



CITY COMMISSION - CITY OF WILDWOOD

Mayor/Commissioner – Ed Wolf – Seat 1

Mayor Pro Tem/Commissioner – Pamala Harrison-Bivins – Seat 2

Joe Elliott – Seat 3

Marcos Flores – Seat 4

Julian Green – Seat 5

Jason McHugh – City Manager

Agenda

Regular Meeting

June 26, 2023 7:00 PM

City Hall Commission Chamber

100 N Main Street

Persons with disabilities or language barriers needing assistance to participate in any of these proceedings should contact the City Clerk's Department, ADA Coordinator, at 352-330-1330, Ext. 102, forty-eight (48) hours in advance of the meeting.

F.S.S. 286.0105A - If a person decides to appeal any decision made by the Commission with respect to any matter considered at this meeting, they will need a record of the proceedings, and that for such purpose they may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. The City of Wildwood DOES NOT provide this verbatim record.

1. Call to Order

2. Consent Agenda/Informational Items

(A consent agenda may be presented by the Mayor at the beginning of a meeting. Items may be removed from the consent agenda at the request of any one Commissioner. Items not removed may be adopted by general consent without debate. Removed items may be either taken up immediately after the consent agenda or placed later on the agenda at the discretion of the Commission.)

A. *EXPENDITURE REPORT*

B. *SP 2108-007 PSL HEADQUARTERS*

C. *SP 2201-010 HOTEL SITE @ LOT 12 (TURKEY RUN)*

- D. *SP 2211-001 TRAILWINDS VILLAGE TARGET*
- E. *SP 2211-007 LIVANO WILDWOOD*
- F. *SP 2212-006 CVC-ASC LOT 9 OXFORD POINTE*
- G. *SP 2301-003 VPSD #46*
- H. *PLAT 2305-002 VOSO UNIT 204 FINAL PLAT*

- 3. **Presentations and/or Proclamations**
- 4. **Public Hearings - Timed - Legislative**
- 5. **Public Hearings - Timed - Quasi-Judicial**
- 6. **Public Forum - 4 minute time limit**
- 7. **Ordinances First Reading Only (No Vote)**

- A. ***ORDINANCE NO. O2022-99 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROPOSING A SMALL SCALE FUTURE LAND USE MAP AMENDMENT TO THE ADOPTED COMPREHENSIVE PLAN AND FUTURE LAND USE MAP IN ACCORDANCE WITH THE COMMUNITY PLANNING ACT OF 2011, AS AMENDED; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

CP 2212-001 Thomas Group Planned Development

PARCEL(S) G33-154

The applicant, Ryan Thompson, representing Thomas Group Investments #1 LLC, seeks approval from the City Commission for a Small-Scale Comprehensive Plan Amendment to change the Future Land Use Map designation from Agricultural (Sumter County) to Commercial (City) for the parcel listed above on 4.86 acres MOL. This request is accompanied by rezoning request RZ 2212-001 and Planned Development agreement PD 2212-001.

Special Magistrate recommends approval of Ordinance Number O2022-99.

- B. ***ORDINANCE NO. O2022-100 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA; PROPOSING A ZONING MAP AMENDMENT TO THE OFFICIAL ZONING MAP IN ACCORDANCE WITH SECTIONS 3.2 AND 3.3 OF THE LAND DEVELOPMENT REGULATIONS; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

RZ 2212-001 Thomas Group Planned Development

PARCEL(S) G33-154

The applicant seeks approval from the City Commission to change the zoning

district from RR-1 & A10C (Sumter County) to C-2 (City) for the parcel listed above on 4.86 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment CP 2212-001 and Planned Development agreement PD 2212-001.

Special Magistrate recommends approval of Ordinance Number O2022-100 subject to the approval of O2022-99, which establishes a Future Land Use appropriate to the proposed zoning.

- C. ***ORDINANCE NO. O2023-19 - AN ORDINANCE OF THE CITY OF WILDWOOD GRANTING A REQUEST FOR A PLANNED DEVELOPMENT PURSUANT TO SECTION 8.6 OF THE LAND DEVELOPMENT REGULATIONS FOR CERTAIN PROPERTY WITHIN THE CITY OF WILDWOOD, FLORIDA; OWNED BY THOMAS GROUP INVESTMENTS #1, LLC; PROVIDING FOR SEVERABILITY; PROVIDING FOR CODIFICATION; AND PROVIDING FOR AN EFFECTIVE DATE***

PD 2212-001 Thomas Group Planned Development

PARCEL G33-154

The applicant, Ryan Thompson of CHW, representing Thomas Group Investments #1 LLC seeks approval from the City Commission for a Planned Development (PD) amendment for the development of a multi-story indoor storage facility, of approximately one hundred-five thousand eight hundred and fifty (105,850) square feet. This request will run concurrently with CP/RZ 2212-001 which seeks to change both the future land use and zoning of the designated parcels.

Special Magistrate recommends approval of Ordinance O2023-19.

- D. ***ORDINANCE NO. O2023-20 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROPOSING A SMALL SCALE FUTURE LAND USE MAP AMENDMENT TO THE ADOPTED COMPREHENSIVE PLAN AND FUTURE LAND USE MAP IN ACCORDANCE WITH THE COMMUNITY PLANNING ACT OF 2011, AS AMENDED; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

CP 2302-002 Lucky U Landholding LLC

PARCEL(S) D29-023 & D29-024

The applicant, Michael Rankin of LPG Urban & Regional Planners Inc, representing Nina Jean Driggers Davis seeks approval from the City Commission for a Small-Scale Comprehensive Plan Amendment to change the Future Land Use Map designation from Industrial (Sumter County) to Commercial (City) for the parcels listed above on 4.45 acres MOL. This request is accompanied by rezoning request RZ 2302-003.

Special Magistrate recommends approval of Ordinance Number O2023-20.

- E. ***ORDINANCE NO. O2023-21 - AN ORDINANCE OF THE CITY OF***

WILDWOOD, FLORIDA; PROPOSING A ZONING MAP AMENDMENT TO THE OFFICIAL ZONING MAP IN ACCORDANCE WITH SECTIONS 3.2 AND 3.3 OF THE LAND DEVELOPMENT REGULATIONS; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

RZ 2302-003 Lucky U Landholding LLC

PARCEL(S) D29-023 & D29-024

The applicant, Michael Rankin of LPG Urban & Regional Planners Inc, representing Nina Jean Driggers Davis is seeking approval from the City Commission to change the zoning district from RR1C, CN, and R2C (Sumter County) to C-3 (City) for the parcel listed above on 4.45 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment CP 2302-002 (O2023-20).

Special Magistrate recommends approval of Ordinance Number O2023-21 subject to the approval of O2023-20, which establishes a Future Land Use appropriate to the proposed zoning.

- F. ***ORDINANCE NO. O2023-22 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROPOSING A SMALL SCALE FUTURE LAND USE MAP AMENDMENT TO THE ADOPTED COMPREHENSIVE PLAN AND FUTURE LAND USE MAP IN ACCORDANCE WITH THE COMMUNITY PLANNING ACT OF 2011, AS AMENDED; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

CP 2304-001 House of Hope

PARCEL(S) D29B001

The applicant seeks approval from the City Commission for a Small-Scale Comprehensive Plan Amendment to change the Future Land Use Map designation from Industrial (City) to Commercial (City) for the parcels listed above on 5.56 acres MOL. This request is accompanied by rezoning request RZ 2304-002.

Special Magistrate recommends approval of Ordinance Number O2023-22.

- G. ***ORDINANCE NO. O2023-23 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA; PROPOSING A ZONING MAP AMENDMENT TO THE OFFICIAL ZONING MAP IN ACCORDANCE WITH SECTIONS 3.2 AND 3.3 OF THE LAND DEVELOPMENT REGULATIONS; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

RZ 2304-002 House of Hope

PARCEL(S) D29B001

The applicant is seeking approval from the City Commission for a Zoning Map

Amendment to change the zoning district from M-1 (City) to C-3 (City) for the parcel listed above on 5.56 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment CP 2304-001 (O2023-22).

Special Magistrate recommends approval of Ordinance Number O2023-23 subject to approval of O2023-22, which establishes a Future Land Use appropriate to the proposed zoning.

- H. ***ORDINANCE NO. O2023-25 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROPOSING A SMALL SCALE FUTURE LAND USE MAP AMENDMENT TO THE ADOPTED COMPREHENSIVE PLAN AND FUTURE LAND USE MAP IN ACCORDANCE WITH THE COMMUNITY PLANNING ACT OF 2011, AS AMENDED; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

CP 2303-002 All County Collision

PARCEL D08A001

The applicant is seeking approval from the City Commission for a Small Scale Comprehensive Plan Amendment to change the Future Land Use Map designation from Rural Residential (Sumter County) to Commercial (City) for the parcels listed above on 1.97 acres MOL. This request is accompanied by rezoning request RZ 2303-004.

Special Magistrate recommends approval of Ordinance Number O2023-25.

- I. ***ORDINANCE NO. O2023-26 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA; PROPOSING A ZONING MAP AMENDMENT TO THE OFFICIAL ZONING MAP IN ACCORDANCE WITH SECTIONS 3.2 AND 3.3 OF THE LAND DEVELOPMENT REGULATIONS; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

RZ 2303-004 All County Collision

PARCEL D08A001

The applicant is seeking approval from the City Commission for a Zoning Map Amendment to change the zoning district from RR1 (Sumter County) to C-3 (City) for the parcel listed above on 1.97 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment CP 2303-002 (O2023-25).

Special Magistrate recommends approval of Ordinance Number O2023-26 (attached) subject to approval of O2023-25, which establishes a Future Land Use appropriate to the proposed zoning.

8. Resolutions for Approval

- A. ***RESOLUTION NO. R2023-12 - A RESOLUTION OF THE CITY COMMISSION***

OF THE CITY OF WILDWOOD, FLORIDA PROVIDING FOR DECREASES TO THE SOLID WASTE USER CHARGE; RESCINDING RESOLUTION NO. R2023-4; PROVIDING FOR AN EFFECTIVE DATE.

Waste Management Rate Adjustment

Staff recommends approval.

9. Financial & Contracts & Agreements

- A. *RFP NO. 2023-10 PROPERTY AND CASUALTY INSURANCE PROGRAM*
- B. *RIGHT OF ENTRY AND ACCESS AGREEMENT FOR STORMWATER PLANNING SERVICES*
- C. *CHANGE ORDER #4 FOR CR 209 WATER MAIN EXTENSION PHASE 1 IN THE AMOUNT OF \$72,377.13*
- D. *INTENT TO AWARD THE ASHLEY WELL NO. 2 PROJECT TO SAWCROSS, INC. IN THE AMOUNT OF \$277,000.00*
- E. *INTENT TO AWARD THE CONTINENTAL COUNTRY CLUB LIFT STATION/SR 44 FORCEMAIN PROJECT TO DB CIVIL CONSTRUCTION IN THE AMOUNT OF \$3,434,899.00*
- F. *RAMP IMPROVEMENTS AT THE BAKER HOUSE IN THE AMOUNT OF \$22,329.83*
- G. *APPROVAL OF RFP NO. 2023-14 FOR CONTINUING PROFESSIONAL ELECTRICAL SERVICES*
- H. *PLEASANTDALE DRIVE ROADWAY REHABILITATION PROJECT CHANGE ORDER NO. 1 IN THE AMOUNT OF \$25,316.20*

10. General Items for Consideration/Discussion and Other Business

11. Appointments

12. City Manager Reports

13. Other Department Reports

- A. *NATIONAL FLOOD INSURANCE PROGRAM (NFIP) FLOODPLAIN MANAGEMENT REGIONAL PLENARY AND COMMUNITY ASSISTANCE VISITS UPDATE*

14. Commission Members Reports

15. City Attorney Reports

16. Adjournment

Upcoming Events

July 3, 2023 - Happy Birthday, America at Millennium Park from 5pm to 9pm

July 10, 2023 - City Commission Meeting at City Hall at 9am

July 22, 2023 - Back-to-School Summer Bash at the Wildwood Community Center
from 10am to 1pm

June 26, 2023 7:00 PM

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:22 PM

Revenue Account Range: First to Last

Expend Account Range: First to Last

Print Zero YTD Activity: No

Include Non-Anticipated: No

Include Non-Budget: No

Year To Date As Of: 06/30/23

Current Period: 06/01/23 to 06/30/23

Prior Year: 06/01/22 to 06/30/22

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
001-311-1000	AD VALOREM TAXES	9,513,015.23	12,767,400.00	57,811.99	12,881,001.85	113,601.85	101
001-312-4100	LOCAL OPTION GAS TAX	521,726.98	550,510.00	0.00	467,808.10	82,701.90 -	85
001-312-6000	DISCRETIONARY/LOCAL GOVT. INFRA	3,000,973.76	2,912,630.00	0.00	2,654,283.45	258,346.55 -	91
001-313-1000	FRANCHISE TAX-/PROGRESS ENERGY S	914,818.57	800,000.00	0.00	663,951.09	136,048.91 -	83
001-313-1010	FRANCHISE TAX- SECO	1,109,792.58	1,071,605.00	122,978.62	1,050,823.55	20,781.45 -	98
001-313-4080	LEESBURG ELECTRIC FRANCHISE FEE	56,759.18	35,000.00	5,523.03	60,352.79	25,352.79	172
001-313-4160	FRANCHISE TAX- TECO/PEOPLES GAS	252,232.71	250,000.00	31,045.31	226,945.02	23,054.98 -	91
001-313-4170	FENNEY WATER CONS AUTHORITY-UTIL	53,537.52	45,000.00	0.00	37,641.19	7,358.81 -	84
001-313-4180	LEESBURG GAS FRANCHISE FEE	50,945.56	45,000.00	5,411.85	47,231.03	2,231.03	105
001-313-4190	SOUTH SUMTER UTILITY COMPANY FR/	370,207.76	275,000.00	0.00	209,071.57	65,928.43 -	76
001-313-5000	FRANCHISE TAX- WASTE MGMNT-REFU	191,455.95	190,000.00	0.00	133,456.48	56,543.52 -	70
001-313-5001	TRI-COUNTY SANITATION FRANCHISE F	239,734.08	250,000.00	0.00	206,212.67	43,787.33 -	82
001-313-5003	FRANCHISE FEE - SEWWC	228,541.29	245,000.00	0.00	195,529.22	49,470.78 -	80
001-314-1000	UTILITY TAX-PROGRESS ENERGY SVCS	800,587.31	690,000.00	0.00	535,902.45	154,097.55 -	78
001-314-1010	UTILITY TAX-SUMTER ELECTRIC	1,022,299.81	930,000.00	93,990.78	808,510.11	121,489.89 -	87
001-314-3000	UTILITY TAX-WATER SALES	116,647.62	110,000.00	0.00	73,865.55	36,134.45 -	67
001-314-3002	THE VILLAGES-5% WATER UTILITY TAX	226,690.03	250,000.00	0.00	147,931.94	102,068.06 -	59
001-314-3003	CENTRAL SUMTER UTILIITY CO. LLC	112,364.85	125,000.00	0.00	117,553.79	7,446.21 -	94
001-314-4000	UTILITY TAX-SUBURBAN PROPANE	14,947.69	15,000.00	1,165.04	12,453.57	2,546.43 -	83
001-314-4030	FERRELLGAS LP	1,603.55	1,000.00	0.00	1,078.73	78.73	108
001-314-4040	CIRCLE K STORES	210.93	200.00	9.20	264.12	64.12	132
001-314-4080	LEESBURG ELECTRIC UTILITY TAX	42,831.63	30,000.00	3,134.34	38,479.15	8,479.15	128
001-314-4081	LEESBURG GAS UTILITY TAX	75,244.67	60,000.00	8,410.98	67,881.54	7,881.54	113
001-314-4100	INTERCONN RESOURCES LLC	27,549.71	30,000.00	759.25	10,348.86	19,651.14 -	34
001-314-4150	CVS	389.42	200.00	25.00	247.48	47.48	124

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:22 PM

<i>Revenue Account</i>	<i>Description</i>	<i>Prior Yr Rev</i>	<i>Anticipated</i>	<i>Curr Rev</i>	<i>YTD Rev</i>	<i>Excess/Deficit</i>	<i>% Real</i>
001-314-4151	AMERIGAS PROPANE	9,864.39	8,000.00	707.59	6,460.10	1,539.90 -	81
001-314-4152	LOWE'S PROPANE TAX	2,426.64	1,500.00	0.00	1,694.63	194.63	113
001-314-4153	BLOSSMAN COMPANIES PROPANE TAX	0.00	0.00	0.00	229.31	229.31	0
001-314-4160	TECO-PEOPLES GAS	262,582.16	250,000.00	0.00	240,121.75	9,878.25 -	96
001-314-4162	GAS SOUTH UTILITY TAX	335.05	300.00	48.22	575.71	275.71	192
001-314-4190	SOUTH SUMTER UTILITY CO UTILITY TA	148,810.50	85,000.00	0.00	81,801.33	3,198.67 -	96
001-314-4191	PUBLIX UTILITY TAX	932.43	500.00	0.00	774.50	274.50	155
001-314-9010	STATE COMMUNICATIONS TAX	499,413.36	500,000.00	0.00	430,001.99	69,998.01 -	86
001-331-5000	FEMA GRANT	0.00	0.00	0.00	65,810.15	65,810.15	0
001-335-1200	STATE REVENUE SHARING	628,683.58	652,660.00	0.00	425,066.60	227,593.40 -	65
001-335-1400	MOBILE HOME LICENSES	16,437.90	10,000.00	262.00	12,450.49	2,450.49	124
001-335-1600	STATE BEVERAGE LICENSES	7,462.21	8,500.00	0.00	7,609.04	890.96 -	90
001-335-1800	1/2 CENT SALES TAX	1,478,361.37	1,508,170.00	0.00	1,334,198.30	173,971.70 -	88
001-339-1000	SOUTH SUMTER UTILITY PILOT FEES	5,582.80	0.00	0.00	0.00	0.00	0
001-341-2006	COMMUNITY DEVELOPMENT SERVICES	844,761.41	500,000.00	23,205.00	439,558.13	60,441.87 -	88
001-341-2010	TREE MITIGATION PERMITS	25,584.00	0.00	0.00	750.00	750.00	0
001-347-5300	BUILDING RENTAL-WILDWOOD COMMU	75,282.78	50,000.00	2,008.69	65,572.77	15,572.77	131
001-347-5304	COMMUNITY CENTER STAFF FEES	150.00 -	100.00	200.00	300.00	200.00	300
001-347-5305	BUILDING RENTAL-OXFORD COMMUNIT	7,747.58	5,000.00	176.40	9,001.25	4,001.25	180
001-347-5306	BUILDING RENTAL-MLK JR COMMUNITY	1,693.87	1,500.00	40.64	1,323.78	176.22 -	88
001-347-5307	OUTDOOR BUILDING RENTALS	46.10	100.00	18.44	75.32	24.68 -	75
001-347-5308	OPEN SPACE RENTALS	354.97	100.00	0.00	1,190.30	1,090.30	***
001-350-1000	FINES	27,251.97	20,000.00	3,295.68	28,633.64	8,633.64	143
001-351-1002	CODE ENFORCEMENT	1,825.29	1,000.00	122.18	1,662.86	662.86	166
001-351-3000	POLICE-2ND DOLLAR FUND	2,900.28	1,500.00	236.81	7,331.56	5,831.56	489
001-361-0000	INTEREST EARNINGS	85,937.51	5,000.00	0.00	125,450.97	120,450.97	***
001-369-0000	OTHER MISCELLANEOUS REVENUE	6,413.14	10,000.00	877.41	13,043.27	3,043.27	130
001-369-0010	STATE HIGHWAY LIGHTING AGREEMEN	17,247.78	17,765.00	0.00	0.00	17,765.00 -	0

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:22 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
001-369-0012	FDOT HIGHWAY MAINTENANCE AGREEI	15,500.08	13,440.00	4,202.25	8,404.50	5,035.50 -	63
001-369-0050	AUCTION PROCEEDS	9,972.00	10,000.00	0.00	25,262.67	15,262.67	253
001-369-0052	SPONSORSHIPS	1,265.00	1,000.00	0.00	0.00	1,000.00 -	0
001-369-0058	DONATIONS	17,515.70	0.00	1,310.00	16,391.00	16,391.00	0
001-369-0075	MULTI-PURPOSE FIELD RENTAL	0.00	100.00	0.00	0.00	100.00 -	0
001-369-0076	BASEBALL FIELD RENTAL	3,329.84	1,000.00	3.90 -	3,210.04	2,210.04	321
001-369-0078	FIELD PREPARATION FEES	345.00	100.00	0.00	479.24	379.24	479
001-369-0792	PROGRAM REGISTRATION FEES	29,002.57	15,000.00	1,473.00 -	35,810.41	20,810.41	239
001-369-0794	CONCESSION / VENDOR FEES	100.00	100.00	0.00	0.00	100.00 -	0
001-369-0796	SPECIAL EVENT REGISTRATION FEES	1,330.00	1,500.00	30.00 -	4,656.50	3,156.50	310
001-369-2100	POLICE DEPT MISCELLANEOUS REVEN	4,794.00	1,500.00	631.33	4,088.46	2,588.46	273
001-369-3700	MISCELLANEOUS POLICE DONATIONS	0.00	100.00	0.00	0.00	100.00 -	0
001-369-3748	MISC. GRANTS/VESTS	2,325.00	0.00	0.00	2,800.00	2,800.00	0
001-369-4000	FUEL TAX REFUND	11,470.88	6,500.00	0.00	3,839.20	2,660.80 -	59
001-380-1000	OTHR FINANCING SOURCE-INSURANCE	67,736.50	0.00	0.00	0.00	0.00	0
001-380-1001	OTHER FINANCING SOURCE-COUNTY R	90,804.00	0.00	0.00	0.00	0.00	0
001-382-1010	TRANSFER FROM INDUSTRIAL PARK	10,000.00	10,000.00	0.00	0.00	10,000.00 -	0
001-382-1013	TRANSFER FROM LAW ENFORCEMENT	412,800.00	412,800.00	0.00	0.00	412,800.00 -	0
001-389-5000	NON-OPERATIONAL CASH FORWARD-G	0.00	5,806,015.00	0.00	0.00	5,806,015.00 -	0
GENERAL FUND Revenue Totals		23,781,188.03	31,594,395.00	366,101.13	24,054,455.07	7,539,939.93 -	76

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-511-00-0000	LEGISLATIVE- CITY COMMISSION:	0.00	0.00	0.00	0.00	0.00	0
001-511-10-1200	SALARIES	42,528.84	48,910.00	4,141.26	36,993.11	11,916.89	76
001-511-10-2100	FICA EXPENSE	3,253.32	3,750.00	316.79	2,829.85	920.15	75
001-511-10-2200	RETIREMENT	22,461.75	27,880.00	2,360.51	20,334.16	7,545.84	73
001-511-10-2300	LIFE & HEALTH INSURANCE	285.00	350.00	23.75	398.24	48.24 -	114
001-511-10-2600	WORKERS COMPENSATION INSURANCE	133.96	150.00	12.02	163.59	13.59 -	109

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:22 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-511-30-3100	PROFESSIONAL SERVICES	2,200.00	6,000.00	0.00	200.00	5,800.00	3
001-511-30-4000	TRAVEL & PER DIEM	6,205.44	7,000.00	0.00	573.96	6,426.04	8
001-511-30-4100	TELEPHONE EXPENSE	1,196.00	2,000.00	90.54	724.66	1,275.34	36
001-511-30-4110	IT LICENSING / EQUIPMENT	4,807.20	8,470.00	0.00	4,857.81	3,612.19	57
001-511-30-4600	REPAIR & MAINTENANCE	0.00	500.00	0.00	0.00	500.00	0
001-511-30-4900	MISC. EXPENSE & OTHER CURRENT	66.37	2,500.00	0.00	2,691.45	191.45 -	108
001-511-30-5100	OFFICE SUPPLIES	39.00	150.00	0.00	0.00	150.00	0
001-511-30-5200	OPERATING SUPPLIES	98.66	400.00	0.00	23.15	376.85	6
001-511-30-5400	SUBSCRIPTIONS/DUES	2,680.00	5,300.00	0.00	4,167.00	1,133.00	79
001-511-30-5500	TRAINING	1,650.00	2,650.00	0.00	0.00	2,650.00	0
001-511-60-6300	CAPITAL IMPROVEMENT-OTHER	5,698.00	0.00	0.00	0.00	0.00	0
511 LEGISLATIVE- CITY COMMISSION:		93,303.54	116,010.00	6,944.87	73,956.98	42,053.02	64
001-512-00-0000	EXECUTIVE- CITY MANAGER:	0.00	0.00	0.00	0.00	0.00	0
001-512-10-1200	SALARIES	283,686.15	448,710.00	30,220.19	295,751.24	152,958.76	66
001-512-10-1300	OVERTIME	69.81	0.00	0.00	0.00	0.00	0
001-512-10-1500	SICK LEAVE	6,172.52	0.00	95.00	2,404.33	2,404.33 -	0
001-512-10-1600	VACATION PAY	12,418.17	0.00	2,017.89	16,853.94	16,853.94 -	0
001-512-10-1800	HOLIDAY PAY	12,853.78	0.00	2,528.79	14,178.77	14,178.77 -	0
001-512-10-2100	FICA EXPENSE	24,024.10	34,330.00	2,651.64	24,540.43	9,789.57	71
001-512-10-2200	RETIREMENT	84,211.65	110,900.00	8,613.58	81,591.25	29,308.75	74
001-512-10-2210	BENEFIT ADMIN FEES	58.50	0.00	0.00	108.00	108.00 -	0
001-512-10-2300	LIFE & HEALTH INSURANCE	24,071.20	46,800.00	2,826.92	32,024.92	14,775.08	68
001-512-10-2600	WORKERS COMPENSATION INSURANCE	446.58	500.00	40.07	545.36	45.36 -	109
001-512-30-3100	PROFESSIONAL SERVICES	53,952.16	125,000.00	7,432.00	45,604.90	79,395.10	36
001-512-30-3450	CLOTHING AND UNIFORMS	0.00	500.00	0.00	183.96	316.04	37
001-512-30-4000	TRAVEL & PER DIEM	7,309.05	10,600.00	536.00	4,649.53	5,950.47	44
001-512-30-4100	TELEPHONE EXPENSE	2,788.94	4,500.00	171.08	2,662.77	1,837.23	59

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:22 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-512-30-4110	IT LICENSING / EQUIPMENT	2,890.83	11,840.00	0.00	11,526.42	313.58	97
001-512-30-4150	ADVERTISING/RECORDING EXPENSE	0.00	4,000.00	26.64	1,519.36	2,480.64	38
001-512-30-4200	POSTAGE/TRANSPORTATION FEES	7.29	500.00	0.00	87.62	412.38	18
001-512-30-4600	REPAIR & MAINTENANCE	946.22	5,800.00	226.45	930.30	4,869.70	16
001-512-30-4900	MISC. EXPENSE & OTHER CURRENT	501.71	1,000.00	0.00	414.79	585.21	41
001-512-30-5100	OFFICE SUPPLIES	338.18	2,000.00	0.00	1,116.51	883.49	56
001-512-30-5200	OPERATING SUPPLIES	593.17	7,250.00	0.00	5,670.76	1,579.24	78
001-512-30-5400	SUBSCRIPTIONS/DUES	3,846.24	5,650.00	0.00	2,346.75	3,303.25	42
001-512-30-5500	TRAINING	2,137.51	9,000.00	0.00	1,960.00	7,040.00	22
001-512-60-6400	CAP. IMPROVEMENT-MACHINERY	0.00	5,200.00	0.00	4,633.40	566.60	89
	512 EXECUTIVE- CITY MANAGER:	523,323.76	834,080.00	57,386.25	551,305.31	282,774.69	66
001-513-00-0000	CLERK/FINANCE DEPARTMENT:	0.00	0.00	0.00	0.00	0.00	0
001-513-10-1200	SALARIES	221,653.11	283,920.00	19,343.20	157,170.68	126,749.32	55
001-513-10-1300	OVERTIME	24.88	500.00	0.00	0.00	500.00	0
001-513-10-1500	SICK LEAVE	6,549.71	0.00	267.69	4,768.10	4,768.10 -	0
001-513-10-1600	VACATION PAY	16,092.88	0.00	999.44	8,746.41	8,746.41 -	0
001-513-10-1800	HOLIDAY PAY	10,401.00	0.00	1,084.76	6,655.19	6,655.19 -	0
001-513-10-2100	FICA EXPENSE	19,486.82	21,760.00	1,659.64	13,566.33	8,193.67	62
001-513-10-2200	RETIREMENT	32,712.84	37,280.00	2,918.20	24,267.45	13,012.55	65
001-513-10-2210	BENEFIT ADMIN FEES	54.00	0.00	0.00	0.00	0.00	0
001-513-10-2300	LIFE & HEALTH INSURANCE	35,524.88	46,800.00	3,599.01	26,647.01	20,152.99	57
001-513-10-2500	UNEMPLOYMENT COMPENSATION	0.00	500.00	0.00	0.00	500.00	0
001-513-10-2600	WORKERS COMPENSATION INSURANCE	893.14	1,000.00	80.14	1,090.71	90.71 -	109
001-513-30-3100	PROFESSIONAL SERVICES	13,361.60	17,750.00	0.00	25.00	17,725.00	0
001-513-30-3200	ACCOUNTING/AUDITING FEE	18,500.00	19,250.00	16,500.00	16,500.00	2,750.00	86
001-513-30-3400	OTHER CONTRACTUAL SERVICES	2,720.05	14,800.00	1,045.17	9,031.32	5,768.68	61
001-513-30-4000	TRAVEL & PER DIEM	0.00	2,000.00	159.61	215.17	1,784.83	11

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-513-30-4100	TELEPHONE EXPENSE	3,480.22	6,300.00	40.27	3,411.47	2,888.53	54
001-513-30-4110	IT LICENSING / EQUIPMENT	32,428.68	37,540.00	1,700.00	31,023.02	6,516.98	83
001-513-30-4150	ADVERTISING/RECORDING EXPENSE	2,857.35	1,580.00	0.00	171.10	1,408.90	11
001-513-30-4200	POSTAGE/TRANSPORTATION FEES	5,000.62	3,150.00	288.58	2,529.24	620.76	80
001-513-30-4300	UTILITIES EXPENSE	18,321.51	27,300.00	1,501.76	11,997.14	15,302.86	44
001-513-30-4400	RENTAL & LEASING	2,995.45	3,900.00	177.40	2,352.95	1,547.05	60
001-513-30-4500	GENERAL INSURANCE	149,199.14	190,000.00	0.00	185,308.13	4,691.87	98
001-513-30-4600	REPAIR & MAINTENANCE	12,369.37	22,470.00	0.00	6,207.84	16,262.16	28
001-513-30-4900	MISC. EXPENSE & OTHER CURRENT	5,655.83	6,000.00	340.93	3,513.37	2,486.63	59
001-513-30-4910	ELECTION EXPENSES	0.00	500.00	0.00	0.00	500.00	0
001-513-30-5100	OFFICE SUPPLIES	4,216.10	3,600.00	210.00	3,003.68	596.32	83
001-513-30-5200	OPERATING SUPPLIES	7,147.80	7,050.00	100.67	4,251.31	2,798.69	60
001-513-30-5400	SUBSCRIPTIONS/DUES	432.50	1,180.00	0.00	187.50	992.50	16
001-513-30-5500	TRAINING	1,818.00	3,360.00	0.00	799.00	2,561.00	24
001-513-60-6300	CAPITAL IMPROVEMENT-OTHER	0.00	7,560.00	0.00	0.00	7,560.00	0
001-513-70-7100	DEBT SERVICE/CITY HALL-PRINCIPAL	109,873.75	112,595.00	0.00	55,952.53	56,642.47	50
001-513-70-7200	DEBT SERVICE/CITY HALL-INTEREST	24,553.79	21,835.00	0.00	11,261.25	10,573.75	52
001-513-70-7500	DEBT SERVICE/POLICE STATION-PRINC	223,552.49	229,425.00	0.00	113,969.00	115,456.00	50
001-513-70-7550	DEBT SERVICE/POLICE STATION-INTERI	68,058.21	62,185.00	0.00	31,836.35	30,348.65	51
001-513-70-7600	DEBT SERV/2018 GEN FUND PROJ LOAN	327,167.69	333,315.00	0.00	333,314.33	0.67	100
001-513-70-7650	DEBT SERV/2018 GEN FUND PROJ LOAN	95,401.31	89,270.00	0.00	89,263.05	6.95	100
	513 CLERK/FINANCE DEPARTMENT:	1,472,504.72	1,615,675.00	52,016.47	1,159,035.63	456,639.37	72
001-516-00-0000	DEVELOPMENT SERVICES:	0.00	0.00	0.00	0.00	0.00	0
001-516-10-1200	SALARIES	477,983.17	707,050.00	42,597.46	366,306.56	340,743.44	52
001-516-10-1300	OVERTIME	1,684.41	1,000.00	130.36	759.49	240.51	76
001-516-10-1500	SICK LEAVE	10,237.69	0.00	779.49	10,246.59	10,246.59 -	0
001-516-10-1600	VACATION PAY	29,637.20	0.00	2,258.64	13,520.55	13,520.55 -	0

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<i>Expenditure Account</i>	<i>Description</i>	<i>Prior Yr Expd</i>	<i>Budgeted</i>	<i>Current Expd</i>	<i>YTD Expended</i>	<i>Balance</i>	<i>% Expd</i>
001-516-10-1800	HOLIDAY PAY	19,472.89	0.00	2,857.55	16,181.42	16,181.42 -	0
001-516-10-2100	FICA EXPENSE	41,234.27	54,170.00	3,719.73	31,136.69	23,033.31	57
001-516-10-2200	RETIREMENT	77,619.65	105,520.00	6,801.65	57,871.35	47,648.65	55
001-516-10-2210	BENEFIT ADMIN FEES	211.50	0.00	0.00	67.50	67.50 -	0
001-516-10-2300	LIFE & HEALTH INSURANCE	70,554.20	107,640.00	7,416.29	58,677.19	48,962.81	55
001-516-10-2600	WORKERS COMPENSATION INSURANCE	1,339.72	1,500.00	120.21	1,636.07	136.07 -	109
001-516-30-3100	PROFESSIONAL SERVICES	502,781.20	525,000.00	1,460.75	309,720.26	215,279.74	59
001-516-30-3400	OTHER CONTRACTUAL SERVICES	1,361.24	14,500.00	0.00	596.75	13,903.25	4
001-516-30-3450	CLOTHING AND UNIFORMS	981.46	2,000.00	0.00	456.92	1,543.08	23
001-516-30-4000	TRAVEL & PER DIEM	4,014.91	24,650.00	55.28	766.38	23,883.62	3
001-516-30-4100	TELEPHONE EXPENSE	9,092.98	8,000.00	166.88	4,829.51	3,170.49	60
001-516-30-4110	IT LICENSING / EQUIPMENT	15,689.09	55,100.00	0.00	28,421.00	26,679.00	52
001-516-30-4150	ADVERTISING/RECORDING EXPENSE	33,762.20	25,000.00	2,039.84	20,511.08	4,488.92	82
001-516-30-4200	POSTAGE/TRANSPORTATION FEES	1,849.68	8,000.00	0.00	971.65	7,028.35	12
001-516-30-4600	REPAIR & MAINTENANCE	3,417.08	6,000.00	253.44	1,442.65	4,557.35	24
001-516-30-4900	MISC. EXPENSE & OTHER CURRENT	273.06	10,000.00	75.86	1,468.07	8,531.93	15
001-516-30-4950	CODE ENFORCEMENT	2,738.41	51,500.00	0.00	3,240.57	48,259.43	6
001-516-30-5100	OFFICE SUPPLIES	2,250.71	10,000.00	21.20	1,598.23	8,401.77	16
001-516-30-5200	OPERATING SUPPLIES	15,236.35	10,000.00	79.36	3,355.10	6,644.90	34
001-516-30-5250	FUEL EXPENSE	1,957.56	2,500.00	103.85	1,087.54	1,412.46	44
001-516-30-5400	SUBSCRIPTIONS/DUES	2,383.95	3,980.00	0.00	665.17	3,314.83	17
001-516-30-5500	TRAINING	7,497.85	19,460.00	723.60	5,137.39	14,322.61	26
001-516-30-5550	LICENSING	10,961.10	0.00	0.00	0.00	0.00	0
001-516-60-6300	CAPITAL IMPROVEMENT-OTHER	0.00	18,000.00	0.00	11,128.33	6,871.67	62
001-516-60-6330	JPA COMP PLAN AMENDMENTS	15,033.63	0.00	0.00	0.00	0.00	0
001-516-60-6400	CAPITAL IMPROV.-MACHINERY/EQUIPMENT	39,090.00	0.00	0.00	0.00	0.00	0
516 DEVELOPMENT SERVICES:		1,400,347.16	1,770,570.00	71,661.44	951,800.01	818,769.99	54

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-518-00-0000	INFORMATION TECHNOLOGY DEPARTM	0.00	0.00	0.00	0.00	0.00	0
001-518-10-1200	SALARIES	112,674.55	190,330.00	11,256.83	100,293.84	90,036.16	53
001-518-10-1300	OVERTIME	41.47	0.00	0.00	0.00	0.00	0
001-518-10-1500	SICK LEAVE	6,520.75	0.00	1,225.52	2,210.32	2,210.32 -	0
001-518-10-1600	VACATION PAY	6,969.13	0.00	176.05	4,632.64	4,632.64 -	0
001-518-10-1800	HOLIDAY PAY	5,224.00	0.00	488.10	2,507.14	2,507.14 -	0
001-518-10-2100	FICA EXPENSE	10,054.87	14,570.00	1,005.70	8,387.79	6,182.21	58
001-518-10-2200	RETIREMENT	14,627.63	22,670.00	1,565.76	13,058.59	9,611.41	58
001-518-10-2210	BENEFIT ADMIN FEES	54.00	0.00	0.00	36.00	36.00 -	0
001-518-10-2300	LIFE & HEALTH INSURANCE	15,172.20	28,080.00	2,040.77	14,565.75	13,514.25	52
001-518-10-2600	WORKERS COMPENSATION INSURANCE	178.65	200.00	16.03	218.13	18.13 -	109
001-518-30-3100	PROFESSIONAL SERVICES	375.00	145,320.00	0.00	25.00	145,295.00	0
001-518-30-3400	OTHER CONTRACTUAL SERVICES	988.66	15,160.00	329.33	2,918.64	12,241.36	19
001-518-30-4000	TRAVEL & PER DIEM	0.00	7,500.00	0.00	0.00	7,500.00	0
001-518-30-4100	TELEPHONE EXPENSE	5,873.59	5,000.00	130.81	4,575.50	424.50	92
001-518-30-4110	IT LICENSING / EQUIPMENT	8,595.85	21,700.00	0.00	6,626.28	15,073.72	31
001-518-30-4200	POSTAGE/TRANSPORTATION FEES	8.26	250.00	0.00	0.00	250.00	0
001-518-30-4300	UTILITIES EXPENSE	1,758.96	2,300.00	190.35	923.16	1,376.84	40
001-518-30-4400	RENTAL & LEASING	0.00	500.00	0.00	0.00	500.00	0
001-518-30-4600	REPAIR & MAINTENANCE	75.01	4,000.00	0.04	20.19	3,979.81	0
001-518-30-4900	MISC. EXPENSE & OTHER CURRENT	0.00	8,000.00	0.00	397.91	7,602.09	5
001-518-30-5100	OFFICE SUPPLIES	203.59	900.00	0.00	352.48	547.52	39
001-518-30-5200	OPERATING SUPPLIES	7,769.60	15,000.00	0.00	1,743.16	13,256.84	12
001-518-30-5400	SUBSCRIPTIONS/DUES	355.00	2,500.00	0.00	200.00	2,300.00	8
001-518-30-5500	TRAINING	1,552.98	8,000.00	350.00	1,605.91	6,394.09	20
001-518-30-5550	LICENSING	47,110.77	30,000.00	0.00	12,565.34	17,434.66	42
001-518-60-6300	CAPITAL IMPROVEMENT-OTHER	13,771.91	0.00	0.00	0.00	0.00	0
001-518-60-6400	CAP. IMPROVEMENTS-MACHINERY/EQU	17,215.00	16,000.00	0.00	0.00	16,000.00	0

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<i>Expenditure Account</i>	<i>Description</i>	<i>Prior Yr Expd</i>	<i>Budgeted</i>	<i>Current Expd</i>	<i>YTD Expended</i>	<i>Balance</i>	<i>% Expd</i>
	518 INFORMATION TECHNOLOGY DEPA	277,171.43	537,980.00	18,775.29	177,863.77	360,116.23	33
001-519-00-0000	HUMAN RESOURCE DEPARTMENT:	0.00	0.00	0.00	0.00	0.00	0
001-519-10-1200	SALARIES	106,595.87	130,420.00	8,971.46	88,343.60	42,076.40	68
001-519-10-1300	OVERTIME	298.61	0.00	0.00	0.00	0.00	0
001-519-10-1500	SICK LEAVE	2,327.18	0.00	0.00	1,529.67	1,529.67 -	0
001-519-10-1600	VACATION PAY	5,570.61	0.00	987.00	4,031.33	4,031.33 -	0
001-519-10-1800	HOLIDAY PAY	4,608.81	0.00	576.08	4,098.04	4,098.04 -	0
001-519-10-2100	FICA EXPENSE	9,134.78	9,980.00	805.88	7,497.23	2,482.77	75
001-519-10-2200	RETIREMENT	13,266.32	15,540.00	1,254.66	11,672.14	3,867.86	75
001-519-10-2210	BENEFIT ADMIN FEES	54.00	0.00	0.00	31.50	31.50 -	0
001-519-10-2300	LIFE & HEALTH INSURANCE	15,291.36	18,720.00	1,445.24	13,007.16	5,712.84	69
001-519-10-2600	WORKERS COMPENSATION INSURANCE	98.26	110.00	8.82	119.99	9.99 -	109
001-519-30-3100	PROFESSIONAL SERVICES	2,216.00	60,000.00	0.00	21,620.00	38,380.00	36
001-519-30-3400	OTHER CONTRACTUAL SERVICES	863.04	6,400.00	329.33	2,928.64	3,471.36	46
001-519-30-4000	TRAVEL & PER DIEM	3,484.89	4,800.00	6.50	461.66	4,338.34	10
001-519-30-4100	TELEPHONE EXPENSE	5,005.64	4,750.00	85.54	2,936.65	1,813.35	62
001-519-30-4110	IT LICENSING / EQUIPMENT	19,496.92	20,530.00	0.00	20,036.69	493.31	98
001-519-30-4150	ADVERTISING/RECRUITING	4,730.00	4,700.00	0.00	1,305.25	3,394.75	28
001-519-30-4200	POSTAGE/TRANSPORTATION FEES	176.50	500.00	0.00	127.13	372.87	25
001-519-30-4300	UTILITIES EXPENSE	2,073.75	2,300.00	190.34	1,151.17	1,148.83	50
001-519-30-4400	RENTAL & LEASING	10.40	60.00	0.00	0.00	60.00	0
001-519-30-4600	REPAIR & MAINTENANCE	2,925.88	3,000.00	0.00	2,019.12	980.88	67
001-519-30-4800	EMPLOYEE PROGRAMS	6,724.51	8,000.00	0.00	5,442.51	2,557.49	68
001-519-30-4900	MISC. EXPENSE & OTHER CURRENT	519.40	1,000.00	0.00	365.37	634.63	37
001-519-30-5100	OFFICE SUPPLIES	1,076.85	2,900.00	75.66	951.36	1,948.64	33
001-519-30-5200	OPERATING SUPPLIES	1,034.38	2,800.00	0.00	1,960.65	839.35	70
001-519-30-5250	FUEL EXPENSE	533.82	700.00	42.90	291.20	408.80	42

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-519-30-5400	SUBSCRIPTIONS/DUES	1,023.24	2,380.00	0.00	1,451.92	928.08	61
001-519-30-5500	TRAINING	4,574.94	4,850.00	350.00	4,655.14	194.86	96
001-519-30-5501	STAFF TRAINING PROGRAMS	1,780.05	5,000.00	0.00	1,685.13	3,314.87	34
	519 HUMAN RESOURCE DEPARTMENT:	215,496.01	309,440.00	15,129.41	199,720.25	109,719.75	65
001-521-00-0000	POLICE DEPARTMENT:	0.00	0.00	0.00	0.00	0.00	0
001-521-10-1200	SALARIES	2,027,045.38	3,539,580.00	201,718.05	1,712,977.31	1,826,602.69	48
001-521-10-1220	UNIFORM ALLOWANCE	13,980.00	14,820.00	1,300.00	10,380.00	4,440.00	70
001-521-10-1250	ON CALL	7,050.00	10,400.00	450.00	4,650.00	5,750.00	45
001-521-10-1260	SHIFT DIFFERENTIAL	14,061.06	20,080.00	1,166.28	9,242.35	10,837.65	46
001-521-10-1300	OVERTIME	117,487.00	157,000.00	4,935.61	90,134.62	66,865.38	57
001-521-10-1500	SICK LEAVE	72,320.99	0.00	3,667.67	41,369.01	41,369.01 -	0
001-521-10-1600	VACATION PAY	101,695.36	0.00	5,500.00	77,730.93	77,730.93 -	0
001-521-10-1700	INCENTIVE PAY	20,290.00	56,000.00	2,220.00	16,830.00	39,170.00	30
001-521-10-1800	HOLIDAY PAY	83,822.11	0.00	11,915.50	73,335.58	73,335.58 -	0
001-521-10-1820	HOLIDAY PREMIUM	73,753.36	82,000.00	7,659.76	58,748.54	23,251.46	72
001-521-10-2100	FICA EXPENSE	194,120.65	295,680.00	18,484.33	160,298.01	135,381.99	54
001-521-10-2200	RETIREMENT	629,058.51	1,103,850.00	62,733.37	546,829.02	557,020.98	50
001-521-10-2210	BENEFIT ADMIN FEES	243.00	0.00	0.00	274.50	274.50 -	0
001-521-10-2300	LIFE & HEALTH INSURANCE	317,222.69	547,560.00	30,063.51	260,644.61	286,915.39	48
001-521-10-2500	UNEMPLOYMENT COMP. REIMBURSEME	2,817.24	0.00	0.00	4,608.24	4,608.24 -	0
001-521-10-2600	WORKERS COMPENSATION INSURANCE	58,053.22	65,000.00	5,208.94	70,894.89	5,894.89 -	109
001-521-30-3100	PROFESSIONAL SERVICES	10,888.21	48,000.00	800.00	12,294.99	35,705.01	26
001-521-30-3400	OTHER CONTRACTUAL SERVICES	12,915.35	26,800.00	2,621.07	26,554.86	245.14	99
001-521-30-3450	CLOTHING AND UNIFORMS	10,568.31	12,000.00	0.00	8,329.13	3,670.87	69
001-521-30-3500	INVESTIGATIONS	7,924.44	15,000.00	775.50	5,493.59	9,506.41	37
001-521-30-4000	TRAVEL & PER DIEM	4,507.60	9,000.00	797.00	4,315.72	4,684.28	48
001-521-30-4100	TELEPHONE EXPENSE	63,838.47	80,000.00	3,964.62	41,714.16	38,285.84	52

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<i>Expenditure Account</i>	<i>Description</i>	<i>Prior Yr Expd</i>	<i>Budgeted</i>	<i>Current Expd</i>	<i>YTD Expended</i>	<i>Balance</i>	<i>% Expd</i>
001-521-30-4110	IT LICENSING / EQUIPMENT	231,419.52	191,600.00	154.03 -	197,689.85	6,089.85 -	103
001-521-30-4200	POSTAGE/TRANSPORTATION FEES	288.24	3,000.00	0.00	93.09	2,906.91	3
001-521-30-4300	UTILITIES EXPENSE	61,711.43	54,000.00	453.84	34,534.70	19,465.30	64
001-521-30-4400	RENTAL & LEASING	2,115.43	10,500.00	149.00	1,581.56	8,918.44	15
001-521-30-4600	REPAIR & MAINTENANCE	56,916.32	70,000.00	1,082.39	50,485.35	19,514.65	72
001-521-30-4900	MISC. EXPENSE & OTHER CURRENT	876.65 -	4,000.00	0.00	65.64	3,934.36	2
001-521-30-4960	BOOT ALLOWANCE	2,127.90	4,600.00	326.34	1,356.13	3,243.87	29
001-521-30-5100	OFFICE SUPPLIES	773.09	5,000.00	293.16	1,389.36	3,610.64	28
001-521-30-5200	OPERATING SUPPLIES	57,147.52	83,000.00	707.12	38,318.61	44,681.39	46
001-521-30-5250	FUEL EXPENSE	161,988.94	195,000.00	12,374.68	95,409.15	99,590.85	49
001-521-30-5400	SUBSCRIPTIONS/DUES	1,343.48	3,000.00	0.00	920.05	2,079.95	31
001-521-30-5500	TRAINING	30,853.06	40,000.00	3,385.61	24,643.95	15,356.05	62
001-521-60-6300	CAPITAL IMPROVEMENT-OTHER	0.00	320,000.00	0.00	7,600.00	312,400.00	2
001-521-60-6400	CAP. IMPROVEMENT-MACHINERY	185,188.49	222,840.00	0.00	116,625.00	106,215.00	52
001-521-70-7100	2018 POLICE CARS CAP LEASE-PRINCIPAL	57,524.09	0.00	0.00	0.00	0.00	0
001-521-70-7200	2018 POLICE CARS CAP LEASE-INTEREST	4,170.32	0.00	0.00	0.00	0.00	0
	521 POLICE DEPARTMENT:	4,696,354.13	7,289,310.00	384,599.32	3,808,362.50	3,480,947.50	52
001-541-00-0000	PUBLIC WORKS/STREET DEPT.	0.00	0.00	0.00	0.00	0.00	0
001-541-10-1200	SALARIES	823,617.11	1,256,900.00	67,655.03	682,978.19	573,921.81	54
001-541-10-1250	ON CALL	3,900.00	3,900.00	300.00	2,850.00	1,050.00	73
001-541-10-1300	OVERTIME	12,544.80	12,000.00	531.71	7,055.55	4,944.45	59
001-541-10-1500	SICK LEAVE	39,374.25	0.00	9,761.67	33,718.83	33,718.83 -	0
001-541-10-1600	VACATION PAY	45,392.03	0.00	3,484.04	43,119.14	43,119.14 -	0
001-541-10-1800	HOLIDAY PAY	35,068.54	0.00	4,833.54	29,790.74	29,790.74 -	0
001-541-10-2100	FICA EXPENSE	73,460.10	97,370.00	6,698.77	61,290.87	36,079.13	63
001-541-10-2200	RETIREMENT	112,253.47	172,760.00	12,549.24	116,684.49	56,075.51	68
001-541-10-2210	BENEFIT ADMIN FEES	27.00	0.00	0.00	0.00	0.00	0

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-541-10-2300	LIFE & HEALTH INSURANCE	137,294.00	234,000.00	14,154.11	120,406.42	113,593.58	51
001-541-10-2500	UNEMPLOYMENT COMPENSATION	0.00	2,000.00	0.00	39.50	1,960.50	2
001-541-10-2600	WORKERS COMPENSATION INSURANCE	17,862.46	20,000.00	1,602.76	21,813.82	1,813.82 -	109
001-541-30-3100	PROFESSIONAL SERVICES	93,620.80	211,580.00	1,619.75	57,230.93	154,349.07	27
001-541-30-3400	OTHER CONTRACTUAL SERVICES	100,675.83	433,100.00	1,395.71	136,103.90	296,996.10	31
001-541-30-3440	RIGHT-OF-WAY MAINTENANCE	108,099.00	265,000.00	0.00	73,402.57	191,597.43	28
001-541-30-3450	CLOTHING AND UNIFORMS	8,393.87	8,000.00	793.40	6,053.44	1,946.56	76
001-541-30-4000	TRAVEL & PER DIEM	591.73	5,500.00	0.00	1,435.34	4,064.66	26
001-541-30-4100	TELEPHONE EXPENSE	17,623.27	24,600.00	0.00	12,334.45	12,265.55	50
001-541-30-4110	IT LICENSING / EQUIPMENT	29,537.40	80,400.00	781.38	22,545.91	57,854.09	28
001-541-30-4200	POSTAGE/TRANSPORTATION FEES	49.14	100.00	0.00	61.22	38.78	61
001-541-30-4300	UTILITIES EXPENSE	24,202.35	23,200.00	1,711.30	14,903.12	8,296.88	64
001-541-30-4350	VILLAGES STREET LIGHTING	446,207.51	470,000.00	41,379.17	333,014.55	136,985.45	71
001-541-30-4400	RENTAL & LEASING	1,685.87	7,575.00	0.00	3,236.38	4,338.62	43
001-541-30-4600	REPAIR & MAINTENANCE	32,147.82	51,200.00	1,156.32	39,564.17	11,635.83	77
001-541-30-4601	REPAIR & MAINTENANCE - BUILDINGS	11,562.67	25,000.00	67.89	2,478.70	22,521.30	10
001-541-30-4900	MISC. EXPENSE & OTHER CURRENT	18.92	3,000.00	0.00	322.10	2,677.90	11
001-541-30-4940	LANDFILL DISPOSAL FEES	2,446.05	5,000.00	0.00	3,234.53	1,765.47	65
001-541-30-4960	BOOT ALLOWANCE	2,493.28	4,025.00	253.21	2,294.87	1,730.13	57
001-541-30-5100	OFFICE SUPPLIES	2,389.14	3,000.00	59.16	2,021.20	978.80	67
001-541-30-5200	OPERATING SUPPLIES	59,736.59	70,000.00	2,909.53	50,775.89	19,224.11	73
001-541-30-5250	FUEL EXPENSE	38,832.19	45,000.00	1,580.48	19,412.61	25,587.39	43
001-541-30-5400	SUBSCRIPTIONS/DUES	1,349.87	9,225.00	0.00	5,204.03	4,020.97	56
001-541-30-5500	TRAINING	13,759.37	19,080.00	275.00	7,159.60	11,920.40	38
001-541-60-6115	CITY HALL / ANNEX REHAB	60,663.05	50,000.00	1,422.94	3,527.36	46,472.64	7
001-541-60-6210	PUBLIC WORKS BUILDING	0.00	9,700.00	0.00	6,308.00	3,392.00	65
001-541-60-6400	CAP. IMPROVEMENT-MACHINERY	106,377.50	369,608.00	0.00	303,139.02	66,468.98	82
001-541-60-6681	PRINCIPAL-EQUIPMENT LEASE	46,316.72	28,200.00	0.00	28,171.17	28.83	100

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-541-60-6691	INTEREST-EQUIPMENT LEASE	4,091.49	2,165.00	0.00	2,160.33	4.67	100
	541 PUBLIC WORKS/STREET DEPT.	2,513,665.19	4,022,188.00	176,976.11	2,255,842.94	1,766,345.06	56
001-549-00-0000	FLEET MAINTENANCE DEPT:	0.00	0.00	0.00	0.00	0.00	0
001-549-10-1200	SALARIES	165,584.51	245,440.00	16,766.57	158,883.71	86,556.29	65
001-549-10-1210	SPECIAL PAY	0.00	1,500.00	0.00	0.00	1,500.00	0
001-549-10-1500	SICK LEAVE	3,984.32	0.00	0.00	4,418.92	4,418.92 -	0
001-549-10-1600	VACATION PAY	12,787.72	0.00	2,169.39	10,796.14	10,796.14 -	0
001-549-10-1800	HOLIDAY PAY	7,001.01	0.00	996.63	7,084.34	7,084.34 -	0
001-549-10-2100	FICA EXPENSE	14,485.54	18,900.00	1,524.83	13,860.51	5,039.49	73
001-549-10-2200	RETIREMENT	21,027.95	29,420.00	2,373.98	21,578.93	7,841.07	73
001-549-10-2210	BENEFIT ADMIN FEES	0.00	0.00	0.00	18.00	18.00 -	0
001-549-10-2300	LIFE & HEALTH INSURANCE	30,260.16	46,800.00	3,587.53	30,155.10	16,644.90	64
001-549-10-2600	WORKERS COMPENSATION INSURANCE	6,966.43	7,800.00	625.08	8,507.44	707.44 -	109
001-549-30-3100	PROFESSIONAL SERVICES	0.00	500.00	0.00	25.00	475.00	5
001-549-30-3400	OTHER CONTRACTUAL SERVICES	220.00	2,800.00	237.00	1,802.64	997.36	64
001-549-30-3450	CLOTHING AND UNIFORMS	2,338.53	3,500.00	0.00	1,071.68	2,428.32	31
001-549-30-4000	TRAVEL & PER DIEM	70.90	100.00	3.84	3.84	96.16	4
001-549-30-4100	TELEPHONE EXPENSE	2,354.52	3,500.00	174.26	2,213.71	1,286.29	63
001-549-30-4110	IT LICENSING / EQUIPMENT	15,463.45	31,500.00	602.64	10,001.48	21,498.52	32
001-549-30-4200	POSTAGE/TRANSPORTATION FEES	0.00	100.00	0.00	0.00	100.00	0
001-549-30-4300	UTILITIES EXPENSE	4,388.52	5,000.00	300.32	3,589.16	1,410.84	72
001-549-30-4400	RENTAL & LEASING	1,580.89	2,500.00	0.00	1,361.50	1,138.50	54
001-549-30-4600	REPAIR & MAINTENANCE	2,896.45	5,000.00	66.54 -	2,731.38	2,268.62	55
001-549-30-4900	MISC. EXPENSE & OTHER CURRENT	0.00	100.00	0.00	0.00	100.00	0
001-549-30-4960	BOOT ALLOWANCE	235.37	700.00	175.00	622.34	77.66	89
001-549-30-5100	OFFICE SUPPLIES	645.01	1,500.00	10.04	1,195.36	304.64	80
001-549-30-5200	OPERATING SUPPLIES	26,334.32	35,000.00	1,261.59	22,333.89	12,666.11	64

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-549-30-5250	FUEL EXPENSE	3,990.54	3,500.00	226.34	2,228.67	1,271.33	64
001-549-30-5400	SUBSCRIPTIONS/DUES	1,069.99	500.00	0.00	0.00	500.00	0
001-549-30-5500	TRAINING	400.00	2,500.00	0.00	1,234.00	1,266.00	49
001-549-60-6400	CAP. IMPROVEMENTS-MACHINERY/EQU	23,626.15	85,900.00	1,353.60	76,608.34	9,291.66	89
	549 FLEET MAINTENANCE DEPT:	347,712.28	534,060.00	32,322.10	382,326.08	151,733.92	72
001-572-00-0000	PARKS & RECREATION:	0.00	0.00	0.00	0.00	0.00	0
001-572-10-1200	SALARIES	438,703.66	711,530.00	47,945.43	371,133.92	340,396.08	52
001-572-10-1250	ON CALL	3,900.00	3,500.00	300.00	2,850.00	650.00	81
001-572-10-1300	OVERTIME	11,767.52	2,000.00	181.35	6,261.50	4,261.50 -	313
001-572-10-1500	SICK LEAVE	15,073.16	0.00	788.25	9,783.35	9,783.35 -	0
001-572-10-1600	VACATION PAY	21,229.69	0.00	1,027.80	12,964.46	12,964.46 -	0
001-572-10-1800	HOLIDAY PAY	16,704.26	0.00	2,308.91	15,188.59	15,188.59 -	0
001-572-10-1820	HOLIDAY PREMIUM	166.00	0.00	0.00	0.00	0.00	0
001-572-10-2100	FICA EXPENSE	38,827.68	54,860.00	4,020.21	32,281.15	22,578.85	59
001-572-10-2200	RETIREMENT	54,034.36	85,405.00	5,731.25	49,277.89	36,127.11	58
001-572-10-2210	BENEFIT ADMIN FEES	0.00	0.00	0.00	4.50	4.50 -	0
001-572-10-2300	LIFE & HEALTH INSURANCE	78,852.42	131,040.00	9,096.61	79,434.30	51,605.70	61
001-572-10-2500	UNEMPLOYMENT COMPENSATION	37.41	0.00	0.00	0.00	0.00	0
001-572-10-2600	WORKERS COMPENSATION INSURANCE	5,358.78	6,000.00	480.83	6,544.18	544.18 -	109
001-572-30-3100	PROFESSIONAL SERVICES	20,650.50	15,750.00	0.00	11,738.39	4,011.61	75
001-572-30-3400	OTHER CONTRACTUAL SERVICES	96,812.20	131,900.00	975.00	59,030.57	72,869.43	45
001-572-30-3450	CLOTHING AND UNIFORMS	3,842.07	7,550.00	0.00	1,511.22	6,038.78	20
001-572-30-4000	TRAVEL & PER DIEM	1,012.59	3,900.00	0.00	22.36	3,877.64	1
001-572-30-4100	TELEPHONE EXPENSE	19,695.91	18,000.00	511.44	13,824.65	4,175.35	77
001-572-30-4110	IT LICENSING / EQUIPMENT	28,329.62	38,500.00	118.44 -	38,688.24	188.24 -	100
001-572-30-4150	ADVERTISING AND PROMOTIONS	23,045.57	34,000.00	720.00	25,642.16	8,357.84	75
001-572-30-4200	POSTAGE/TRANSPORTATION FEES	31.27	200.00	0.00	2.31	197.69	1

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-572-30-4300	UTILITIES EXPENSE	16,082.05	25,100.00	2,899.48	22,303.46	2,796.54	89
001-572-30-4400	RENTAL & LEASING	4,148.21	6,900.00	108.96	2,224.54	4,675.46	32
001-572-30-4600	REPAIR & MAINTENANCE	38,063.27	103,620.00	6.58	26,424.63	77,195.37	26
001-572-30-4601	REPAIR & MAINTENANCE - BUILDINGS	2,955.18	38,500.00	0.00	1,134.74	37,365.26	3
001-572-30-4610	BAKER HOUSE MAINTENANCE	2,506.91	10,000.00	0.00	425.78	9,574.22	4
001-572-30-4620	BAKER HOUSE OPERATIONS-OTHER MI	6,702.16	7,070.00	65.95	4,227.76	2,842.24	60
001-572-30-4630	BAKER HOUSE SPECIAL EVENTS	7,474.65	10,000.00	0.00	10,814.53	814.53 -	108
001-572-30-4900	MISC. EXPENSE & OTHER CURRENT	777.87	5,000.00	0.00	424.19	4,575.81	8
001-572-30-4910	SPECIAL EVENTS	123,526.80	118,500.00	13,477.13	105,295.48	13,204.52	89
001-572-30-4915	PROGRAMS, ACTIVITIES & LEAGUES	76,459.67	110,100.00	8,780.89	68,574.12	41,525.88	62
001-572-30-4920	SUMMER RECREATION PROGRAM	15,547.80	42,500.00	2,359.00	5,114.88	37,385.12	12
001-572-30-4960	BOOT ALLOWANCE	1,122.58	1,575.00	0.00	312.77	1,262.23	20
001-572-30-5100	OFFICE SUPPLIES	2,015.73	2,000.00	276.07	2,862.58	862.58 -	143
001-572-30-5200	OPERATING SUPPLIES	71,356.54	95,600.00	2,365.48	56,950.80	38,649.20	60
001-572-30-5250	FUEL EXPENSE	25,357.37	30,000.00	1,845.03	12,947.85	17,052.15	43
001-572-30-5280	LANDSCAPING	18,306.97	30,000.00	296.09	19,148.82	10,851.18	64
001-572-30-5400	SUBSCRIPTIONS/DUES	410.10	2,610.00	0.00	174.78	2,435.22	7
001-572-30-5500	TRAINING	4,105.00	10,600.00	0.00	1,614.00	8,986.00	15
001-572-60-6200	CAP. IMPROVEMENT-BUILDINGS	0.00	39,100.00	0.00	38,696.00	404.00	99
001-572-60-6300	CAPITAL IMPROVEMENT-OTHER	18,647.65	25,000.00	0.00	0.00	25,000.00	0
001-572-60-6351	MLK PARK PROJECT	224,643.64	103,240.96	0.00	94,686.97	8,553.99	92
001-572-60-6400	CAP. IMPROVEMENT-MACHINERY	75,786.00	149,690.52	0.00	106,759.91	42,930.61	71
	572 PARKS & RECREATION:	1,614,070.82	2,210,841.48	106,449.30	1,317,302.33	893,539.15	60
001-575-00-0000	COMMUNITY CENTER:	0.00	0.00	0.00	0.00	0.00	0
001-575-10-1200	SALARIES	11,311.43	87,450.00	5,190.36	27,691.02	59,758.98	32
001-575-10-1300	OVERTIME	55.69	0.00	0.00	0.00	0.00	0
001-575-10-2100	FICA EXPENSE	869.65	6,690.00	397.08	2,118.41	4,571.59	32

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
001-575-10-2200	RETIREMENT	1,318.13	10,420.00	592.75	3,267.12	7,152.88	31
001-575-10-2300	LIFE & HEALTH INSURANCE	0.00	200.00	0.00	4.75	195.25	2
001-575-30-3100	PROFESSIONAL SERVICES	849.85	3,000.00	0.00	499.85	2,500.15	17
001-575-30-3400	OTHER CONTRACTUAL SERVICES	1,134.70	8,440.00	0.00	1,345.00	7,095.00	16
001-575-30-3450	CLOTHING AND UNIFORMS	220.48	1,200.00	0.00	0.00	1,200.00	0
001-575-30-4100	TELEPHONE EXPENSE	2,835.02	6,680.00	0.00	2,947.13	3,732.87	44
001-575-30-4200	POSTAGE/TRANSPORTATION FEES	17.07	250.00	0.00	131.79	118.21	53
001-575-30-4300	UTILITIES EXPENSE	45,205.90	24,800.00	5,948.36	29,920.35	5,120.35 -	121
001-575-30-4400	RENTAL & LEASING	1,912.19	2,600.00	39.28	716.43	1,883.57	28
001-575-30-4600	REPAIR & MAINTENANCE	12,029.48	30,000.00	0.00	1,843.32	28,156.68	6
001-575-30-5100	OFFICE SUPPLIES	425.01	1,000.00	0.00	809.96	190.04	81
001-575-30-5200	OPERATING SUPPLIES	7,528.12	15,000.00	73.32	2,566.17	12,433.83	17
001-575-30-5400	SUBSCRIPTIONS/DUES	100.00	0.00	0.00	75.00	75.00 -	0
	575 COMMUNITY CENTER:	85,812.72	197,730.00	12,241.15	73,936.30	123,793.70	37
001-580-90-0000	CONTINGENCY	0.00	0.00	0.00	0.00	0.00	0
001-580-90-9901	CONTINGENCY RESERVE-GEN FUND	0.00	1,858,780.52	0.00	0.00	1,858,780.52	0
001-581-00-1040	TRANSFER TO EXPANDED CRA	185,870.00	197,730.00	0.00	0.00	197,730.00	0
001-581-90-3010	TRANSFER TO CAPITAL PROJECT FUND	18,650,000.00	10,100,000.00	0.00	2,100,000.00	8,000,000.00	21
	581 Total	18,835,870.00	10,297,730.00	0.00	2,100,000.00	8,197,730.00	20
GENERAL FUND Expenditure Totals		32,075,631.76	31,594,395.00	934,501.71	13,051,452.10	18,542,942.90	41

001 GENERAL FUND	Prior	Current	YTD
Revenues:	23,781,188.03	366,101.13	24,054,455.07
Expenditures:	32,075,631.76	934,501.71	13,051,452.10
Net Income:	8,294,443.73 -	568,400.58 -	11,003,002.97

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
101-361-1350	INTEREST EARNED	521.29	200.00	0.00	259.31	59.31	130
101-364-1000	CEMETERY LOT SALES	2,100.00	2,100.00	0.00	1,400.00	700.00 -	67
101-366-1350	CONTRIBUTIONS/DUES	2,430.00	2,000.00	0.00	480.00	1,520.00 -	24
101-366-1360	GRAVE OPENING PERMITS	600.00	600.00	0.00	600.00	0.00	100
101-369-0000	OTHER MISCELLANEOUS REVENUE	0.00	100.00	0.00	0.00	100.00 -	0
101-389-5000	NON-OPER/ CEMETERY RESERVES FOF	0.00	57,400.00	0.00	0.00	57,400.00 -	0
CEMETERY FUND Revenue Totals		5,651.29	62,400.00	0.00	2,739.31	59,660.69 -	4

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
101-569-00-0000	GREENWOOD CEMETERY:	0.00	0.00	0.00	0.00	0.00	0
101-569-30-3100	PROFESSIONAL SERVICES	0.00	8,450.00	0.00	0.00	8,450.00	0
101-569-30-4600	REPAIR & MAINTENANCE	0.00	500.00	0.00	0.00	500.00	0
101-569-30-4900	MISC. EXPENSE & OTHER CURRENT	61.37	200.00	0.00	0.00	200.00	0
101-569-30-5200	OPERATING SUPPLIES	0.00	100.00	0.00	0.00	100.00	0
569 GREENWOOD CEMETERY:		61.37	9,250.00	0.00	0.00	9,250.00	0
101-580-90-9999	CONTINGENCY	0.00	53,150.00	0.00	0.00	53,150.00	0
CEMETERY FUND Expenditure Totals		61.37	62,400.00	0.00	0.00	62,400.00	0

101 CEMETERY FUND	Prior	Current	YTD
Revenues:	5,651.29	0.00	2,739.31
Expenditures:	61.37	0.00	0.00
Net Income:	5,589.92	0.00	2,739.31

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<i>Revenue Account</i>	<i>Description</i>	<i>Prior Yr Rev</i>	<i>Anticipated</i>	<i>Curr Rev</i>	<i>YTD Rev</i>	<i>Excess/Deficit</i>	<i>% Real</i>
104-361-0000	INTEREST	8,461.61	0.00	0.00	7,652.11	7,652.11	0
104-369-9000	TAX INCREMENT FINANCING - SUM CTY	369,830.00	368,670.00	0.00	0.00	368,670.00 -	0
104-382-0010	TRANSFER FROM GENERAL	185,870.00	197,730.00	0.00	0.00	197,730.00 -	0
104-389-5006	CASH FORWARD - CRA DISTRICT	0.00	1,007,900.00	0.00	0.00	1,007,900.00 -	0
	COMMUNITY REDEVELOPMENT Revenue	564,161.61	1,574,300.00	0.00	7,652.11	1,566,647.89 -	0

<i>Expenditure Account</i>	<i>Description</i>	<i>Prior Yr Expd</i>	<i>Budgeted</i>	<i>Current Expd</i>	<i>YTD Expended</i>	<i>Balance</i>	<i>% Expd</i>
104-550-00-0000	COMM REDEVELOPMENT DEPT.:	0.00	0.00	0.00	0.00	0.00	0
104-550-10-1200	SALARIES	31,654.31	42,210.00	2,570.19	27,878.73	14,331.27	66
104-550-10-1500	SICK LEAVE	599.30	0.00	0.00	438.97	438.97 -	0
104-550-10-1600	VACATION PAY	2,697.94	0.00	685.38	2,162.94	2,162.94 -	0
104-550-10-1800	HOLIDAY PAY	1,265.58	0.00	171.35	1,156.69	1,156.69 -	0
104-550-10-2100	FICA EXPENSE	2,770.52	3,230.00	262.16	2,420.28	809.72	75
104-550-10-2200	RETIREMENT	4,330.56	5,030.00	1,081.88	9,987.92	4,957.92 -	199
104-550-10-2300	LIFE & HEALTH INSURANCE	3,524.49	3,600.00	293.74	2,643.66	956.34	73
104-550-30-3100	PROFESSIONAL SERVICES	6,875.00	135,000.00	0.00	0.00	135,000.00	0
104-550-30-4000	TRAVEL & PER DIEM	0.00	1,500.00	0.00	0.00	1,500.00	0
104-550-30-5400	SUBSCRIPTIONS/DUES	175.00	175.00	0.00	200.00	25.00 -	114
104-550-30-5500	TRAINING	0.00	4,000.00	0.00	0.00	4,000.00	0
104-550-60-6330	FACADE IMPROVEMENT GRANT	0.00	80,000.00	0.00	0.00	80,000.00	0
104-550-70-7303	DEMOLITIONS	0.00	20,000.00	0.00	0.00	20,000.00	0
104-550-70-7307	MISC. OTHER PROJECTS	70,653.62	55,925.00	0.00	9,825.00	46,100.00	18
104-550-70-7308	DOWNTOWN PARKING IMPROVEMENTS	167,101.15	50,000.00	0.00	0.00	50,000.00	0
	550 COMM REDEVELOPMENT DEPT.:	291,647.47	400,670.00	5,064.70	56,714.19	343,955.81	14

104-580-90-9904	CONTINGENCY - CRA DISTRICT	0.00	1,173,630.00	0.00	0.00	1,173,630.00	0
	COMMUNITY REDEVELOPMENT Expend	291,647.47	1,574,300.00	5,064.70	56,714.19	1,517,585.81	4

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

104 COMMUNITY REDEVELOPMENT	Prior	Current	YTD
Revenues:	564,161.61	0.00	7,652.11
Expenditures:	291,647.47	5,064.70	56,714.19
Net Income:	272,514.14	5,064.70 -	49,062.08 -

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
105-361-0000	INTEREST	162.35	100.00	0.00	54.10	45.90 -	54
105-369-0058	DONATIONS	14,697.00	15,000.00	0.00	23,062.00	8,062.00	154
105-389-5010	CASH FORWARD - BAKER HOUSE	0.00	27,400.00	0.00	0.00	27,400.00 -	0
BAKER HOUSE Revenue Totals		14,859.35	42,500.00	0.00	23,116.10	19,383.90 -	54

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
105-576-00-0000	BAKER HOUSE DEPARTMENT:	0.00	0.00	0.00	0.00	0.00	0
105-576-30-4620	BAKER HOUSE OPERATIONS	103.38	30,000.00	0.00	46.00	29,954.00	0
105-580-90-9910	CONTINGENCY - BAKER HOUSE	0.00	12,500.00	0.00	0.00	12,500.00	0
BAKER HOUSE Expenditure Totals		103.38	42,500.00	0.00	46.00	42,454.00	0

105 BAKER HOUSE	<u>Prior</u>	<u>Current</u>	<u>YTD</u>
Revenues:	14,859.35	0.00	23,116.10
Expenditures:	103.38	0.00	46.00
Net Income:	14,755.97	0.00	23,070.10

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
106-589-5010	CARRY FORWARD - HISTORICAL FUND	0.00	45.00	0.00	0.00	45.00 -	0
	WILDWOOD AREA HISTORICAL ASSOCI	0.00	45.00	0.00	0.00	45.00 -	0

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
106-577-00-0000	WILDWOOD AREA HISTORICAL ASSN	0.00	0.00	0.00	0.00	0.00	0
106-580-90-9911	CONTINGENCY - HISTORICAL ACCT	0.00	45.00	0.00	0.00	45.00	0
	WILDWOOD AREA HISTORICA Expendit	0.00	45.00	0.00	0.00	45.00	0

106 WILDWOOD AREA HISTORICAL AS:	<u>Prior</u>	<u>Current</u>	<u>YTD</u>
Revenues:	0.00	0.00	0.00
Expenditures:	0.00	0.00	0.00
Net Income:	0.00	0.00	0.00

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
107-341-3004	RECREATION IMPACT FEES	241,018.02	225,000.00	57,999.40	334,077.93	109,077.93	148
107-361-0000	INTEREST	2,318.59	0.00	0.00	3,637.54	3,637.54	0
107-389-5004	CASH FORWARD - P & R IMPACT FEE	0.00	275,000.00	0.00	0.00	275,000.00 -	0
	RECREATION IMPACT FEES Revenue To	243,336.61	500,000.00	57,999.40	337,715.47	162,284.53 -	67

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
107-572-00-0000	RECREATION IMPACT FEES:	0.00	0.00	0.00	0.00	0.00	0
107-580-90-9903	CONTINGENCY - P&R IMPACT FEES	0.00	500,000.00	0.00	0.00	500,000.00	0
	RECREATION IMPACT FEES Expenditure	0.00	500,000.00	0.00	0.00	500,000.00	0

107 RECREATION IMPACT FEES	Prior	Current	YTD
Revenues:	243,336.61	57,999.40	337,715.47
Expenditures:	0.00	0.00	0.00
Net Income:	243,336.61	57,999.40	337,715.47

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
108-341-3001	LAW ENFORCEMENT IMPACT FEES	1,416,256.93	1,100,000.00	89,897.78	549,998.19	550,001.81 -	50
108-361-0000	INTEREST	153.73	0.00	0.00	113.56	113.56	0
108-389-5002	CASH FORWARD - POLICE IMPACT FEE	0.00	1,540,500.00	0.00	0.00	1,540,500.00 -	0
	LAW ENFORCEMENT IMPACT FEES Rev	1,416,410.66	2,640,500.00	89,897.78	550,111.75	2,090,388.25 -	21

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
108-521-00-0000	LAW ENFORCEMENT IMPACT FEES:	0.00	0.00	0.00	0.00	0.00	0
108-521-30-4900	MISC. EXPENSE & OTHER CURRENT	389.02	0.00	0.00	229.32	229.32 -	0
108-521-60-6400	CAP. IMPROVEMENT- MACHINERY & EQ	215,588.32	710,400.00	31,328.00 -	95,165.14	615,234.86	13
108-521-70-9105	TRANSFER TO GENERAL FUND - LOAN I	412,800.00	412,800.00	0.00	0.00	412,800.00	0
	521 LAW ENFORCEMENT IMPACT FEES	628,777.34	1,123,200.00	31,328.00 -	95,394.46	1,027,805.54	8
108-580-90-9902	CONTINGENCY -LAW ENFORCEMENT IM	0.00	1,517,300.00	0.00	0.00	1,517,300.00	0
	LAW ENFORCEMENT IMPACT Expenditu	628,777.34	2,640,500.00	31,328.00 -	95,394.46	2,545,105.54	4

108 LAW ENFORCEMENT IMPACT FEES	Prior	Current	YTD
Revenues:	1,416,410.66	89,897.78	550,111.75
Expenditures:	628,777.34	31,328.00 -	95,394.46
Net Income:	787,633.32	121,225.78	454,717.29

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
301-361-0000	INTEREST	77,499.22	100.00	0.00	80,900.27	80,800.27	***
301-382-0010	TRANSFER FROM GENERAL FUND	18,650,000.00	10,100,000.00	0.00	0.00	10,100,000.00 -	0
301-389-5000	NON-OPERATIONAL CASH FORWARD-C	0.00	13,357,100.00	0.00	0.00	13,357,100.00 -	0
	CAPITAL IMPROVEMENT FUND Revenue	18,727,499.22	23,457,200.00	0.00	80,900.27	23,376,299.73 -	0

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
301-500-00-0000	CAPITAL IMPROVEMENT FUND	0.00	0.00	0.00	0.00	0.00	0
301-513-60-6201	CITY HALL HVAC PROJECT	349,579.75	91,581.50	0.00	55,153.13	36,428.37	60
301-516-60-6301	DOWNTOWN MASTER PLAN PROJECTS	53,856.05	125,000.00	3,899.69	16,326.64	108,673.36	13
301-516-60-6302	CITY PARKING FACILITIES REHAB	14,406.65	0.00	0.00	0.00	0.00	0
301-516-60-6303	CITY SIGN AT TRAILWINDS	171,231.00	0.00	0.00	0.00	0.00	0
	516 Total	239,493.70	125,000.00	3,899.69	16,326.64	108,673.36	13

301-521-60-6301	POLICE DEPARTMENT HQ MONUMENT	0.00	50,000.00	0.00	0.00	50,000.00	0
301-541-60-6101	DRAINAGE PROJECT LAND ACQUISITIO	4,247.17	0.00	0.00	14,434.00	14,434.00 -	0
301-541-60-6201	PW BUILDING METAL ROOF REHAB	98,082.26	0.00	0.00	0.00	0.00	0
301-541-60-6202	MUNICIPAL SERVICES COMPLEX PROJE	3,246,835.17	570,445.37	13,809.19	541,851.83	28,593.54	95
301-541-60-6203	PW POLE BARN	0.00	111,000.00	0.00	118,900.00	7,900.00 -	107
301-541-60-6204	PW BUILDING HVAC UPGRADES	0.00	80,000.00	0.00	4,687.50	75,312.50	6
301-541-60-6205	MSC HVAC UPGRADES	0.00	40,000.00	0.00	39,064.60	935.40	98
301-541-60-6301	PLEASANTDALE REHAB	22,550.00	1,316,375.00	0.00	11,675.00	1,304,700.00	1
301-541-60-6302	BARWICK REHAB	99,665.90	366,675.80	0.00	62,875.00	303,800.80	17
301-541-60-6303	OAK GROVE VILLAGE DRAINAGE IMPRC	6,000.00	948,200.00	0.00	95,778.28	852,421.72	10
301-541-60-6304	PW PARKING FACILITIES REHAB	19,773.35	0.00	0.00	0.00	0.00	0
301-541-60-6305	PAVEMENT PRESERVATION PLAN	635,922.82	1,000,000.00	0.00	37,200.00	962,800.00	4
301-541-60-6306	CLAY DRAIN ROAD DESIGN	157,058.00	614,815.00	3,734.00	79,120.00	535,695.00	13
301-541-60-6307	JACKSON ST IMPROVEMENTS	0.00	200,000.00	0.00	0.00	200,000.00	0
301-541-60-6308	HUEY ST IMPROVEMENTS	0.00	280,000.00	0.00	37,510.00	242,490.00	13

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
301-541-60-6309	ST CLAIR STREET IMPROVEMENTS	0.00	200,000.00	0.00	0.00	200,000.00	0
301-541-60-6310	DOWNTOWN PARKING GARAGE	0.00	0.00	36,237.50	221,369.50	221,369.50 -	0
	541 Total	4,290,134.67	5,727,511.17	53,780.69	1,264,465.71	4,463,045.46	22
301-572-60-6201	MLK PARK CONCESSION STAND/RESTR	21,973.94	328,763.00	28.94	198,987.63	129,775.37	61
301-572-60-6202	BAKER HOUSE RESTROOMS	139,425.64	37,135.00	0.00	42,082.63	4,947.63 -	113
301-572-60-6203	LAKE DEATON RESTROOMS	109,499.41	0.00	0.00	0.00	0.00	0
301-572-60-6204	MILLENNIUM PARK STORAGE BARN	7,069.50	0.00	0.00	0.00	0.00	0
301-572-60-6205	RECREATION CENTER AT MLK PARK	0.00	150,000.00	158,487.34	188,277.02	38,277.02 -	126
301-572-60-6206	OXFORD PARK BATHROOMS	0.00	115,000.00	0.00	0.00	115,000.00	0
301-572-60-6207	OUTREACH CENTER RE-ROOF	0.00	45,000.00	0.00	15,590.00	29,410.00	35
301-572-60-6301	LAKE DEATON PARKING FACILITIES REH	10,213.15	0.00	0.00	0.00	0.00	0
301-572-60-6302	MILLENNIUM PARK IMPROVEMENTS	189,928.98	4,044,385.00	6,375.00	155,580.37	3,888,804.63	4
301-572-60-6303	MLK PARK BASKETBALL COURT REHAB	0.00	112,000.00	18,865.60	26,680.00	85,320.00	24
301-572-60-6304	LAKE DEATON PIER IMPROVEMENTS	0.00	132,000.00	0.00	24.40	131,975.60	0
301-572-60-6305	CITY HALL COURTYARD REHAB	0.00	100,000.00	0.00	29,622.69	70,377.31	30
	572 Total	478,110.62	5,064,283.00	183,756.88	656,844.74	4,407,438.26	13
301-575-60-6201	COMMUNITY CENTER HVAC UPGRADES	0.00	400,000.00	0.00	28,447.50	371,552.50	7
301-575-60-6301	COMMUNITY CENTER PARKING REHAB	21,834.35	0.00	0.00	0.00	0.00	0
	575 Total	21,834.35	400,000.00	0.00	28,447.50	371,552.50	7
301-580-90-9901	CONTINGENCY-CAP.IMPROVEMENT FUN	0.00	11,998,824.33	0.00	0.00	11,998,824.33	0
	CAPITAL IMPROVEMENT FUN Expenditu	5,379,153.09	23,457,200.00	241,437.26	2,021,237.72	21,435,962.28	9

301 CAPITAL IMPROVEMENT FUND

	<u>Prior</u>	<u>Current</u>	<u>YTD</u>
Revenues:	18,727,499.22	0.00	80,900.27
Expenditures:	5,379,153.09	241,437.26	2,021,237.72

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

Net Income:	13,348,346.13	241,437.26 -	1,940,337.45 -
--------------------	----------------------	---------------------	-----------------------

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<i>Revenue Account</i>	<i>Description</i>	<i>Prior Yr Rev</i>	<i>Anticipated</i>	<i>Curr Rev</i>	<i>YTD Rev</i>	<i>Excess/Deficit</i>	<i>% Real</i>
401-343-3100	WATER SALES-OPERATING INCOME	3,134,128.65	3,210,000.00	0.00	1,989,884.53	1,220,115.47 -	62
401-343-3500	WATER- METER INSTALLATIONS	140,063.34	180,000.00	26,380.00	246,595.58	66,595.58	137
401-343-3510	WATER- OTHER (ON/OFF FEES)	37,125.00	30,000.00	0.00	24,180.00	5,820.00 -	81
401-343-3520	WATER INCOME-OTHER	14,266.69	10,000.00	25.00	12,094.66	2,094.66	121
401-343-3550	WATER UTILITY TAX	273.60 -	0.00	0.00	0.00	0.00	0
401-343-4151	RE-ROUTE FEE	28.75 -	0.00	0.00	0.00	0.00	0
401-343-5100	SEWER OPERATING INCOME-BILLINGS	4,708,612.04	4,710,000.00	0.00	2,994,311.46	1,715,688.54 -	64
401-343-5510	SEWER OTHER MISC	0.00	12,000.00	0.00	0.00	12,000.00 -	0
401-343-5511	LAND LEASE-TURTLE MOUNT(TOWER)	15,795.50	15,000.00	1,322.50	13,150.50	1,849.50 -	88
401-343-5520	TSS/COD WASTEWATER FEES	783,061.15	800,000.00	0.00	474,352.03	325,647.97 -	59
401-343-6100	REUSE WATER OPERATIONS	108,490.53	100,000.00	0.00	26,327.89	73,672.11 -	26
401-361-0000	INTEREST EARNINGS	87,671.83	75,000.00	0.00	71,741.91	3,258.09 -	96
401-381-1008	TRANSFER FROM WATER CONNECTION	13,820.00	0.00	0.00	0.00	0.00	0
401-381-1011	TRANSFER FROM WATER SDC FUND	219,080.26	0.00	0.00	0.00	0.00	0
401-381-1014	TRANSFER FROM SEWER SDC FUND	357,517.36	0.00	0.00	0.00	0.00	0
401-389-4000	STATE APPROPRIATIONS	0.00	0.00	0.00	100,000.00	100,000.00	0
401-389-5000	Non-Operational-Cash Forward- W/S	0.00	9,170,000.00	0.00	0.00	9,170,000.00 -	0
UTILITY FUND Revenue Totals		9,619,330.00	18,312,000.00	27,727.50	5,952,638.56	12,359,361.44 -	32

<i>Expenditure Account</i>	<i>Description</i>	<i>Prior Yr Expd</i>	<i>Budgeted</i>	<i>Current Expd</i>	<i>YTD Expended</i>	<i>Balance</i>	<i>% Expd</i>
401-530-00-0000	PHYSICAL ENVIRONMENT/ADMIN:	0.00	0.00	0.00	0.00	0.00	0
401-530-10-1200	SALARIES	129,571.91	162,800.00	10,064.27	105,086.88	57,713.12	65
401-530-10-1300	OVERTIME	0.00	1,000.00	0.00	0.00	1,000.00	0
401-530-10-1500	SICK LEAVE	6,659.06	0.00	762.75	5,031.94	5,031.94 -	0
401-530-10-1600	VACATION PAY	7,634.30	0.00	1,454.48	6,303.11	6,303.11 -	0
401-530-10-1800	HOLIDAY PAY	5,638.77	0.00	646.39	4,765.21	4,765.21 -	0
401-530-10-2100	FICA EXPENSE	11,417.42	12,540.00	987.46	9,256.34	3,283.66	74
401-530-10-2200	RETIREMENT	16,612.60	19,350.00	1,539.71	14,433.37	4,916.63	75

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
401-530-10-2210	BENEFIT ADMIN FEES	54.00	0.00	0.00	36.00	36.00 -	0
401-530-10-2300	LIFE & HEALTH INSURANCE	30,150.00	37,440.00	2,756.04	25,804.36	11,635.64	69
401-530-10-2500	UNEMPLOYMENT COMPENSATION	0.00	1,500.00	0.00	0.00	1,500.00	0
401-530-10-2600	WORKERS COMPENSATION INSURANCE	893.14	1,000.00	80.14	1,090.70	90.70 -	109
401-530-30-3100	PROFESSIONAL SERVICES	772.50	4,125.00	0.00	0.00	4,125.00	0
401-530-30-3200	ACCOUNTING & AUDITING FEES	18,500.00	19,250.00	16,500.00	16,500.00	2,750.00	86
401-530-30-3400	OTHER CONTRACTUAL SERVICES	14,475.67	32,410.00	2,265.19	19,488.91	12,921.09	60
401-530-30-4000	TRAVEL & PER DIEM	0.00	1,000.00	0.00	0.00	1,000.00	0
401-530-30-4100	TELEPHONE EXPENSE	4,717.93	5,250.00	0.00	2,940.92	2,309.08	56
401-530-30-4110	IT LICENSING / EQUIPMENT	17,010.09	25,300.00	1,700.00	26,765.11	1,465.11 -	106
401-530-30-4200	POSTAGE/TRANSPORTATION FEES	26,543.62	33,000.00	288.60	16,107.33	16,892.67	49
401-530-30-4300	UTILITIES EXPENSE	17,714.36	25,000.00	15,801.75	24,830.66	169.34	99
401-530-30-4400	RENTAL & LEASING	2,995.44	3,200.00	177.40	2,174.73	1,025.27	68
401-530-30-4500	GENERAL INSURANCE	145,449.13	190,000.00	0.00	185,308.12	4,691.88	98
401-530-30-4600	REPAIR & MAINTENANCE	9,145.94	21,000.00	40.85	2,586.49	18,413.51	12
401-530-30-4900	MISC. EXPENSE & OTHER CURRENT	16,173.73	12,300.00	0.00	7,223.07	5,076.93	59
401-530-30-5100	OFFICE SUPPLIES	887.68	2,000.00	210.00	603.69	1,396.31	30
401-530-30-5200	OPERATING SUPPLIES	4,677.81	5,600.00	149.62	3,030.63	2,569.37	54
401-530-30-5400	SUBSCRIPTIONS/DUES	37.50	450.00	0.00	37.50	412.50	8
401-530-30-5500	TRAINING	2,808.00	2,000.00	0.00	702.00	1,298.00	35
	530 PHYSICAL ENVIRONMENT/ADMIN:	490,540.60	617,515.00	55,424.65	480,107.07	137,407.93	78
401-533-00-0000	WATER DEPARTMENT:	0.00	0.00	0.00	0.00	0.00	0
401-533-10-1200	SALARIES	578,503.25	873,990.00	41,585.63	461,952.30	412,037.70	53
401-533-10-1250	ON CALL	7,950.00	7,800.00	600.00	5,775.00	2,025.00	74
401-533-10-1300	OVERTIME	10,948.00	15,000.00	1,213.58	9,300.82	5,699.18	62
401-533-10-1500	SICK LEAVE	19,901.90	0.00	710.34	17,185.13	17,185.13 -	0
401-533-10-1600	VACATION PAY	27,997.90	0.00	4,640.62	31,526.24	31,526.24 -	0

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<i>Expenditure Account</i>	<i>Description</i>	<i>Prior Yr Expd</i>	<i>Budgeted</i>	<i>Current Expd</i>	<i>YTD Expended</i>	<i>Balance</i>	<i>% Expd</i>
401-533-10-1800	HOLIDAY PAY	23,228.01	0.00	2,370.14	18,654.51	18,654.51 -	0
401-533-10-1820	HOLIDAY PREMIUM	3,128.30	5,000.00	0.00	1,757.44	3,242.56	35
401-533-10-2100	FICA EXPENSE	51,381.52	68,990.00	4,028.38	42,108.57	26,881.43	61
401-533-10-2200	RETIREMENT	74,766.51	107,410.00	6,271.69	65,507.70	41,902.30	61
401-533-10-2210	BENEFIT ADMIN FEES	189.00	0.00	0.00	67.50	67.50 -	0
401-533-10-2300	LIFE & HEALTH INSURANCE	90,475.94	168,480.00	8,161.59	83,282.23	85,197.77	49
401-533-10-2500	UNEMPLOYMENT COMPENSATION	0.00	2,500.00	0.00	0.00	2,500.00	0
401-533-10-2600	WORKERS COMPENSATION INSURANCE	13,396.92	15,000.00	1,202.07	16,360.37	1,360.37 -	109
401-533-30-3100	PROFESSIONAL SERVICES	62,113.51	61,890.00	0.00	43,055.12	18,834.88	70
401-533-30-3400	OTHER CONTRACTUAL SERVICES	50,109.22	180,000.00	1,650.04	45,103.03	134,896.97	25
401-533-30-3450	CLOTHING AND UNIFORMS	5,029.71	9,000.00	184.34	4,135.70	4,864.30	46
401-533-30-4000	TRAVEL & PER DIEM	3,402.39	4,500.00	0.00	5,198.43	698.43 -	116
401-533-30-4100	TELEPHONE EXPENSE	26,647.03	38,600.00	1,594.53	22,049.10	16,550.90	57
401-533-30-4110	IT LICENSING / EQUIPMENT	14,033.94	64,200.00	5,540.36	42,857.26	21,342.74	67
401-533-30-4200	POSTAGE/TRANSPORTATION FEES	2,045.46	2,500.00	0.00	51.82	2,448.18	2
401-533-30-4300	UTILITIES EXPENSE	151,616.77	130,000.00	18,587.94	131,647.57	1,647.57 -	101
401-533-30-4400	RENTAL & LEASING	8,001.54	9,000.00	8,308.54	13,407.95	4,407.95 -	149
401-533-30-4600	REPAIR & MAINTENANCE	162,692.01	150,000.00	682.27	52,713.97	97,286.03	35
401-533-30-4900	MISC. EXPENSE & OTHER CURRENT	0.00	5,000.00	0.00	0.00	5,000.00	0
401-533-30-4960	BOOT ALLOWANCE	1,024.79	2,400.00	0.00	887.16	1,512.84	37
401-533-30-5010	BAD DEBT EXPENSE	0.00	0.00	0.00	60.19	60.19 -	0
401-533-30-5100	OFFICE SUPPLIES	3,980.89	4,000.00	35.32	5,067.07	1,067.07 -	127
401-533-30-5200	OPERATING SUPPLIES	319,165.14	250,000.00	9,744.50	264,172.24	14,172.24 -	106
401-533-30-5220	WATER METERS	0.00	460,000.00	4,742.20	247,647.63	212,352.37	54
401-533-30-5250	FUEL EXPENSE	49,450.92	45,000.00	3,317.72	27,949.09	17,050.91	62
401-533-30-5260	CHEMICALS	205,896.28	225,000.00	23,205.75	178,847.69	46,152.31	79
401-533-30-5270	LABORATORY SAMPLES	14,140.00	50,000.00	2,784.00	30,159.00	19,841.00	60
401-533-30-5400	SUBSCRIPTIONS/DUES	5,264.00	9,000.00	0.00	1,808.80	7,191.20	20

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<i>Expenditure Account</i>	<i>Description</i>	<i>Prior Yr Expd</i>	<i>Budgeted</i>	<i>Current Expd</i>	<i>YTD Expended</i>	<i>Balance</i>	<i>% Expd</i>
401-533-30-5500	TRAINING	4,644.09	7,600.00	350.00	3,380.00	4,220.00	44
401-533-60-6200	CAP. IMPROVEMENT-BUILDINGS	4.00	25,334.00	0.00	25,334.00	0.00	100
401-533-60-6300	CAPITAL IMPROVEMENT-OTHER	33,999.55	123,000.00	7,489.00	32,058.35	90,941.65	26
401-533-60-6301	METER CHANGE OUT PROGRAM	18,396.00	206,600.00	0.00	81,600.00	125,000.00	40
401-533-60-6350	LOOP/UPGRADE WATER MAINS	122,750.39	350,000.00	0.00	23,880.00	326,120.00	7
401-533-60-6400	CAP. IMPROVEMENT-MACHINERY	15,939.00	178,000.00	0.00	0.00	178,000.00	0
401-533-60-6681	LEASE PURCHASE PRINCIPAL PMT	0.00	18,450.00	0.00	18,446.55	3.45	100
401-533-60-6691	LEASE PURCHASE INTEREST PMT	0.00	3,155.00	0.00	3,151.86	3.14	100
401-533-70-7319	CR 209 WATER MAIN EXTENSION	3,543.84	540,213.81	153,015.32	693,229.13	153,015.32 -	128
	533 WATER DEPARTMENT:	2,185,757.72	4,416,612.81	312,015.87	2,751,376.52	1,665,236.29	62
401-535-00-0000	WASTEWATER DEPARTMENT:	0.00	0.00	0.00	0.00	0.00	0
401-535-10-1200	SALARIES	698,401.38	1,126,740.00	66,014.43	546,042.95	580,697.05	48
401-535-10-1250	ON CALL	11,325.00	11,700.00	900.00	8,475.00	3,225.00	72
401-535-10-1300	OVERTIME	11,504.15	15,000.00	1,559.00	12,253.42	2,746.58	82
401-535-10-1500	SICK LEAVE	41,969.86	0.00	705.68	13,958.47	13,958.47 -	0
401-535-10-1600	VACATION PAY	47,271.59	0.00	4,090.35	36,125.98	36,125.98 -	0
401-535-10-1800	HOLIDAY PAY	28,565.32	0.00	3,504.29	19,360.70	19,360.70 -	0
401-535-10-1820	HOLIDAY PREMIUM	7,594.27	9,000.00	848.95	7,968.32	1,031.68	89
401-535-10-2100	FICA EXPENSE	65,544.19	88,930.00	6,055.81	49,608.06	39,321.94	56
401-535-10-2200	RETIREMENT	97,095.04	138,450.00	9,428.11	77,923.69	60,526.31	56
401-535-10-2210	BENEFIT ADMIN FEES	184.50	0.00	0.00	67.50	67.50 -	0
401-535-10-2300	LIFE & HEALTH INSURANCE	121,399.96	215,280.00	12,276.93	98,122.52	117,157.48	46
401-535-10-2500	UNEMPLOYMENT COMPENSATION	0.00	2,500.00	0.00	0.00	2,500.00	0
401-535-10-2600	WORKERS COMPENSATION INSURANCE	26,793.74	30,000.00	2,404.14	32,720.75	2,720.75 -	109
401-535-30-3100	PROFESSIONAL SERVICES	85,900.40	82,087.50	0.00	54,978.58	27,108.92	67
401-535-30-3400	OTHER CONTRACTUAL SERVICES	70,454.05	175,000.00	725.08	69,381.15	105,618.85	40
401-535-30-3450	CLOTHING AND UNIFORMS	7,867.83	11,000.00	171.90	4,194.45	6,805.55	38

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
401-535-30-4000	TRAVEL & PER DIEM	998.89 -	4,500.00	270.30	2,554.34	1,945.66	57
401-535-30-4100	TELEPHONE EXPENSE	13,811.03	15,000.00	570.42	12,193.40	2,806.60	81
401-535-30-4110	IT LICENSING / EQUIPMENT	24,462.53	57,900.00	5,774.91	36,774.32	21,125.68	64
401-535-30-4200	POSTAGE/TRANSPORTATION FEES	416.05	1,500.00	0.00	801.26	698.74	53
401-535-30-4300	UTILITIES EXPENSE	340,898.82	270,000.00	37,877.88	278,930.53	8,930.53 -	103
401-535-30-4400	RENTAL & LEASING	2,594.22	2,000.00	9.00	1,258.79	741.21	63
401-535-30-4600	REPAIR & MAINTENANCE	382,839.96	360,200.00	479.33	280,230.37	79,969.63	78
401-535-30-4900	MISC. EXPENSE & OTHER CURRENT	1,740.11	5,000.00	0.00	353.36	4,646.64	7
401-535-30-4940	LANDFILL DISPOSAL FEES	88,413.44	115,000.00	7,056.00	118,550.76	3,550.76 -	103
401-535-30-4960	BOOT ALLOWANCE	1,179.46	3,500.00	0.00	967.35	2,532.65	28
401-535-30-5100	OFFICE SUPPLIES	3,766.83	4,000.00	111.18	3,240.37	759.63	81
401-535-30-5200	OPERATING SUPPLIES	190,152.02	200,000.00	8,156.80	172,310.92	27,689.08	86
401-535-30-5250	FUEL EXPENSE	40,619.27	50,000.00	5,582.78	41,457.33	8,542.67	83
401-535-30-5260	CHEMICALS	96,327.40	200,000.00	13,558.04	140,358.13	59,641.87	70
401-535-30-5270	LABORATORY SAMPLES	45,002.42	65,000.00	0.00	36,500.00	28,500.00	56
401-535-30-5400	SUBSCRIPTIONS/DUES	370.00	4,000.00	0.00	1,146.85	2,853.15	29
401-535-30-5500	TRAINING	1,440.00	7,600.00	0.00	1,317.83	6,282.17	17
401-535-60-6200	CAP. IMPROVEMENT-BUILDINGS	6,830.00	30,000.00	0.00	21,562.00	8,438.00	72
401-535-60-6250	LIFT STATION UPGRADES	261,846.00	576,420.00	0.00	48,760.00	527,660.00	8
401-535-60-6300	CAPITAL IMPROVEMENT-OTHER	193,432.00	227,000.00	0.00	142,489.35	84,510.65	63
401-535-60-6310	MILLENNIUM PARK PROJECT	0.00	243,100.00	0.00	44,750.00	198,350.00	18
401-535-60-6400	CAP. IMPROVEMENT-MACHINERY	4,324.00	1,036,207.00	0.00	481,122.31	555,084.69	46
401-535-60-6610	SEWER SYSTEM RENEWAL AND REPLA	400,175.10	374,700.00	0.00	218,835.00	155,865.00	58
401-535-60-6681	LEASE PURCHASE PRINCIPAL PMT	0.00	75,620.00	0.00	75,617.58	2.42	100
401-535-60-6691	LEASE PURCHASE INTEREST PMT	13,107.50	8,985.00	0.00	8,981.09	3.91	100
401-535-60-6770	SR 44 FM / CCC DECOMMISSIONING	136,242.25	2,500,000.00	0.00	13,786.25	2,486,213.75	1
401-535-70-7302	BUENA VISTA FORCEMAIN	0.00	350,000.00	0.00	300,270.00	49,730.00	86
401-535-70-7303	WILDWOOD ESTATES LS	0.37 -	338,301.37	0.00	265,344.97	72,956.40	78

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<i>Expenditure Account</i>	<i>Description</i>	<i>Prior Yr Expd</i>	<i>Budgeted</i>	<i>Current Expd</i>	<i>YTD Expended</i>	<i>Balance</i>	<i>% Expd</i>
	535 WASTEWATER DEPARTMENT:	3,570,862.43	9,031,220.87	188,131.31	3,781,646.00	5,249,574.87	42
401-580-90-0000	CONTINGENCY:	0.00	0.00	0.00	0.00	0.00	0
401-580-90-9912	CONTIN- WATER SEWER-REFUSE	0.00	3,552,121.32	0.00	0.00	3,552,121.32	0
401-582-00-0000	DEBT SERVICE:	0.00	0.00	0.00	0.00	0.00	0
401-582-30-5900	DEPRECIATION	2,457,368.00	0.00	0.00	0.00	0.00	0
401-582-30-5920	BAD DEBT EXPENSE	29,120.00	0.00	0.00	0.00	0.00	0
401-582-70-7100	SUMTER SCHOOL BOARD LEASE PURC	0.00	170,000.00	0.00	170,000.00	0.00	100
401-582-70-7103	DBT SRV.-SRF LOAN PRIN-2007	0.00	340,810.00	0.00	169,523.38	171,286.62	50
401-582-70-7106	DEBT SERV-2016 CONTINENTAL LOAN (I	0.00	107,755.00	0.00	107,755.08	0.08 -	100
401-582-70-7204	INT EXP.-SRF LOAN-3 (2007)	46,084.86	39,105.00	0.00	20,434.06	18,670.94	52
401-582-70-7205	DEBT SVC.-INTEREST-2013 REFINANCE	2,315.30	0.00	0.00	0.00	0.00	0
401-582-70-7206	DEBT SERV-INTERST-2016 CONTINENTA	29,566.42	26,860.00	0.00	26,859.96	0.04	100
	582 DEBT SERVICE:	2,564,454.58	684,530.00	0.00	494,572.48	189,957.52	72
	UTILITY FUND Expenditure Totals	8,811,615.33	18,302,000.00	555,571.83	7,507,702.07	10,794,297.93	41

401 UTILITY FUND	Prior	Current	YTD
Revenues:	9,619,330.00	27,727.50	5,952,638.56
Expenditures:	8,811,615.33	555,571.83	7,507,702.07
Net Income:	807,714.67	527,844.33 -	1,555,063.51 -

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
402-334-3102	STATE APPROPRIATION - CR 209 WATEF	197,033.60	0.00	0.00	0.00	0.00	0
402-361-0000	INTEREST	24,160.51	1,000.00	0.00	35,127.25	34,127.25	***
402-389-5000	CASH FORWARD	0.00	4,000,000.00	0.00	0.00	4,000,000.00 -	0
	CAPITAL PROJECTS (LOAN/GRANT) Re	221,194.11	4,001,000.00	0.00	35,127.25	3,965,872.75 -	1

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
402-536-70-7353	WWTP PROJECT	0.00	3,000,000.00	200,596.00	200,596.00	2,799,404.00	7
402-580-90-9913	CONTINGENCY - CONSTRUCTION FUND	0.00	1,001,000.00	0.00	0.00	1,001,000.00	0
	CAPITAL PROJECTS (LOAN/ Expenditur	0.00	4,001,000.00	200,596.00	200,596.00	3,800,404.00	5

402 CAPITAL PROJECTS (LOAN/GRANT

	<u>Prior</u>	<u>Current</u>	<u>YTD</u>
Revenues:	221,194.11	0.00	35,127.25
Expenditures:	0.00	200,596.00	200,596.00
Net Income:	221,194.11	200,596.00 -	165,468.75 -

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
403-361-0000	INTEREST EARNINGS	557.21	100.00	0.00	403.77	303.77	404
403-389-5000	NON-OPERATIONAL-CASH FORWARD	0.00	72,500.00	0.00	0.00	72,500.00 -	0
INDUSTRIAL FUND Revenue Totals		557.21	72,600.00	0.00	403.77	72,196.23 -	1

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
403-552-00-0000	INDUSTRIAL PARK:	0.00	0.00	0.00	0.00	0.00	0
403-552-30-3100	PROFESSIONAL SERVICES	0.00	1,000.00	0.00	0.00	1,000.00	0
403-552-30-4900	MISC. EXPENSE & OTHER CURRENT	13.19	0.00	0.00	0.00	0.00	0
403-552-30-4980	DEPRECIATION EXPENSE	6,607.00	0.00	0.00	0.00	0.00	0
552 INDUSTRIAL PARK:		6,620.19	1,000.00	0.00	0.00	1,000.00	0
403-580-90-9999	CONTINGENCY	0.00	61,600.00	0.00	0.00	61,600.00	0
403-581-00-0000	INDUSTRIAL PARK:	0.00	0.00	0.00	0.00	0.00	0
403-581-00-0100	TRANSFER TO GENERAL FUND	10,000.00	10,000.00	0.00	0.00	10,000.00	0
INDUSTRIAL FUND Expenditure Totals		16,620.19	72,600.00	0.00	0.00	72,600.00	0

403 INDUSTRIAL FUND	Prior	Current	YTD
Revenues:	557.21	0.00	403.77
Expenditures:	16,620.19	0.00	0.00
Net Income:	16,062.98 -	0.00	403.77

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
404-343-3501	WATER SYSTEM CONNECTION FEES	7,412.21	7,000.00	0.00	0.00	7,000.00 -	0
404-361-0000	INTEREST	49.41	0.00	0.00	27.08	27.08	0
404-389-5002	CASH FORWARD - WATER CONNECTION	0.00	383,800.00	0.00	0.00	383,800.00 -	0
	WATER CONNECTION FEES Revenue To	7,461.62	390,800.00	0.00	27.08	390,772.92 -	0

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
404-533-30-4900	MISC. EXPENSE & OTHER CURRENT	361.77	0.00	0.00	210.57	210.57 -	0
404-533-70-7352	ASHLEY WTP PROJECT	0.25	390,000.00	0.00	67,028.05	322,971.95	17
	533 Total	362.02	390,000.00	0.00	67,238.62	322,761.38	17
404-580-90-9909	CONTINGENCY - WATER CONNECTION I	0.00	800.00	0.00	0.00	800.00	0
404-581-90-9101	TRANSFER TO W/S FUND	13,820.00	0.00	0.00	0.00	0.00	0
	WATER CONNECTION FEES Expenditure	14,182.02	390,800.00	0.00	67,238.62	323,561.38	17

404 WATER CONNECTION FEES

	<u>Prior</u>	<u>Current</u>	<u>YTD</u>
Revenues:	7,461.62	0.00	27.08
Expenditures:	14,182.02	0.00	67,238.62
Net Income:	6,720.40 -	0.00	67,211.54 -

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
406-343-5500	SEWER TAP CONNECTION FEES	15,731.69	5,000.00	0.00	0.00	5,000.00 -	0
406-361-0000	INTEREST	38.24	0.00	0.00	18.53	18.53	0
406-389-5006	CASH FORWARD - WASTEWATER CONN	0.00	383,950.00	0.00	0.00	383,950.00 -	0
	WASTEWATER CONNECTION FEES Rev	15,769.93	388,950.00	0.00	18.53	388,931.47 -	0

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
406-535-00-0000	SEWER TAP CONNECTION FEES:	0.00	0.00	0.00	0.00	0.00	0
406-535-30-4900	MISC. EXPENSE & OTHER CURRENT	361.20	0.00	0.00	210.38	210.38 -	0
406-535-60-6392	WWTF CLARIFIER DEMO/CONSTRUCTIC	0.00	100,000.00	0.00	0.00	100,000.00	0
406-535-60-6393	WILDWOOD ESTATES LS	0.00	228,589.90	0.00	199,623.00	28,966.90	87
	535 SEWER TAP CONNECTION FEES:	361.20	328,589.90	0.00	199,833.38	128,756.52	61

406-580-90-5006	CONTINGENCY - WASTEWATER CONNE	0.00	60,360.10	0.00	0.00	60,360.10	0
	WASTEWATER CONNECTION F Expendi	361.20	388,950.00	0.00	199,833.38	189,116.62	51

406 WASTEWATER CONNECTION FEES

	<u>Prior</u>	<u>Current</u>	<u>YTD</u>
Revenues:	15,769.93	0.00	18.53
Expenditures:	361.20	0.00	199,833.38
Net Income:	15,408.73	0.00	199,814.85 -

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
408-343-3560	WATER SDC FEES	1,717,366.25	1,500,000.00	444,491.84	1,212,782.52	287,217.48 -	81
408-361-0000	INTEREST EARNED	306.43	100.00	0.00	231.76	131.76	232
408-389-5012	CASH FORWARD - WATER SDC	0.00	3,427,000.00	0.00	0.00	3,427,000.00 -	0
WATER SDC FEES Revenue Totals		1,717,672.68	4,927,100.00	444,491.84	1,213,014.28	3,714,085.72 -	25

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
408-533-30-4900	MISC. EXPENSE & OTHER CURRENT	378.48	0.00	0.00	222.11	222.11 -	0
408-533-70-7352	ASHLEY WTP UPGRADES	0.00	80,000.00	0.00	0.00	80,000.00	0
408-533-70-7354	CR 209 WATER MAIN EXT PHASE 1	0.00	800,000.00	0.00	0.00	800,000.00	0
533 Total		378.48	880,000.00	0.00	222.11	879,777.89	0

408-580-90-9914	CONTINGENCY - WATER SDC FUND	0.00	3,791,070.00	0.00	0.00	3,791,070.00	0
408-581-90-9101	TRANSFER TO W/S FUND	219,080.26	0.00	0.00	0.00	0.00	0
408-582-70-7107	SRF PRINCIPAL - OXFORD WTP	0.00	221,015.00	0.00	110,263.62	110,751.38	50
408-582-70-7207	SRF INTEREST - OXFORD WTP	36,949.34	35,015.00	0.00	17,751.18	17,263.82	51
582 Total		36,949.34	256,030.00	0.00	128,014.80	128,015.20	50

WATER SDC FEES Expenditure Totals		256,408.08	4,927,100.00	0.00	128,236.91	4,798,863.09	3
--	--	-------------------	---------------------	-------------	-------------------	---------------------	----------

408 WATER SDC FEES	Prior	Current	YTD
Revenues:	1,717,672.68	444,491.84	1,213,014.28
Expenditures:	256,408.08	0.00	128,236.91
Net Income:	1,461,264.60	444,491.84	1,084,777.37

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
409-343-5560	WASTEWATER SDC FEES	3,022,260.92	2,650,000.00	776,448.14	2,899,550.26	249,550.26	109
409-361-0000	INTEREST EARNED	615.64	100.00	0.00	462.32	362.32	462
409-389-5013	CASH FORWARD	0.00	6,890,000.00	0.00	0.00	6,890,000.00 -	0
WASTEWATER SDC FEES Revenue Tota		3,022,876.56	9,540,100.00	776,448.14	2,900,012.58	6,640,087.42 -	30

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
409-535-30-4900	MISC. EXPENSE & OTHER CURRENT	385.11	0.00	0.00	225.54	225.54 -	0
409-535-70-7346	WWTP FACILITY PLAN	0.25	7,821,443.75	0.00	460,321.54	7,361,122.21	6
409-535-70-7349	MISC CAPACITY IMPROVEMENTS	124,293.00	0.00	0.00	0.00	0.00	0
409-535-70-7355	BRIDGE CROSSING PROJECT	0.00	788,600.00	0.00	0.00	788,600.00	0
409-535-70-7359	GRAVITY COLLECTION SYS CONDITION	0.00	250,000.00	0.00	0.00	250,000.00	0
535 Total		124,678.36	8,860,043.75	0.00	460,547.08	8,399,496.67	5

409-580-90-9915	CONTINGENCY - WASTEWATER SDC FU	0.00	604,471.25	0.00	0.00	604,471.25	0
409-581-90-9101	TRANSFER TO W/S REVENUE FUND	357,517.36	0.00	0.00	0.00	0.00	0
409-582-70-7101	DBT SERV-SRF CRC09 FORCEMAIN DES	0.00	4,390.00	0.00	2,186.42	2,203.58	50
409-582-70-7102	DBT SRV-SRF CR209 FM CONSTRUCTIO	0.00	69,788.00	34,896.76	69,788.29	0.29 -	100
409-582-70-7200	INTEREST EXPENSE-CR209 FM SRF CO	351.43	332.00	162.64	330.51	1.49	100
409-582-70-7202	INT EXP.-SRF DESIGN LOAN-CR209 FOR	1,147.23	1,075.00	0.00	546.69	528.31	51
582 Total		1,498.66	75,585.00	35,059.40	72,851.91	2,733.09	96

WASTEWATER SDC FEES Expenditure T		483,694.38	9,540,100.00	35,059.40	533,398.99	9,006,701.01	6
--	--	-------------------	---------------------	------------------	-------------------	---------------------	----------

409 WASTEWATER SDC FEES

	<u>Prior</u>	<u>Current</u>	<u>YTD</u>
Revenues:	3,022,876.56	776,448.14	2,900,012.58
Expenditures:	483,694.38	35,059.40	533,398.99
Net Income:	2,539,182.18	741,388.74	2,366,613.59

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

<u>Revenue Account</u>	<u>Description</u>	<u>Prior Yr Rev</u>	<u>Anticipated</u>	<u>Curr Rev</u>	<u>YTD Rev</u>	<u>Excess/Deficit</u>	<u>% Real</u>
601-351-2000	CONFISCATED PROPERTY	0.00	1,500.00	0.00	0.00	1,500.00 -	0
601-361-0000	INTEREST	352.92	10.00	0.00	209.72	199.72	***
LAW ENFORCEMENT FUND Revenue To		352.92	1,510.00	0.00	209.72	1,300.28 -	14

<u>Expenditure Account</u>	<u>Description</u>	<u>Prior Yr Expd</u>	<u>Budgeted</u>	<u>Current Expd</u>	<u>YTD Expended</u>	<u>Balance</u>	<u>% Expd</u>
601-521-00-0000	LAW ENFORCEMENT TRUST:	0.00	0.00	0.00	0.00	0.00	0
601-521-30-4900	MISC. EXPENSE & OTHER CURRENT	36.22	0.00	0.00	0.00	0.00	0
601-580-90-9999	CONTINGENCY	0.00	51,695.00	0.00	0.00	51,695.00	0
LAW ENFORCEMENT FUND Expenditure		36.22	51,695.00	0.00	0.00	51,695.00	0

601 LAW ENFORCEMENT FUND	Prior	Current	YTD
Revenues:	352.92	0.00	209.72
Expenditures:	36.22	0.00	0.00
Net Income:	316.70	0.00	209.72

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING JUNE 26 2023

06/21/2023
04:23 PM

Grand Totals	Prior	Current	YTD
Revenues:	59,358,321.80	1,762,665.79	35,158,141.85
Expenditures:	47,958,291.83	1,940,902.90	23,861,850.44
Net Income:	11,400,029.97	178,237.11 -	11,296,291.41

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: SP 2108-007 PSL Headquarters

REQUESTED ACTION: Special Magistrate recommends approval.

CONTRACT: Vendor/Entity:
Effective Date: Termination Date:
Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

CASE NO.: SP 2108-007 PSL Headquarters

PARCEL NUMBER(S): G07-095

ACREAGE: 0.49 +/-

PROPERTY LOCATION: The subject property is generally located east of N. US 301 & E Kentucky Avenue

OWNER: PSL Properties, LLC

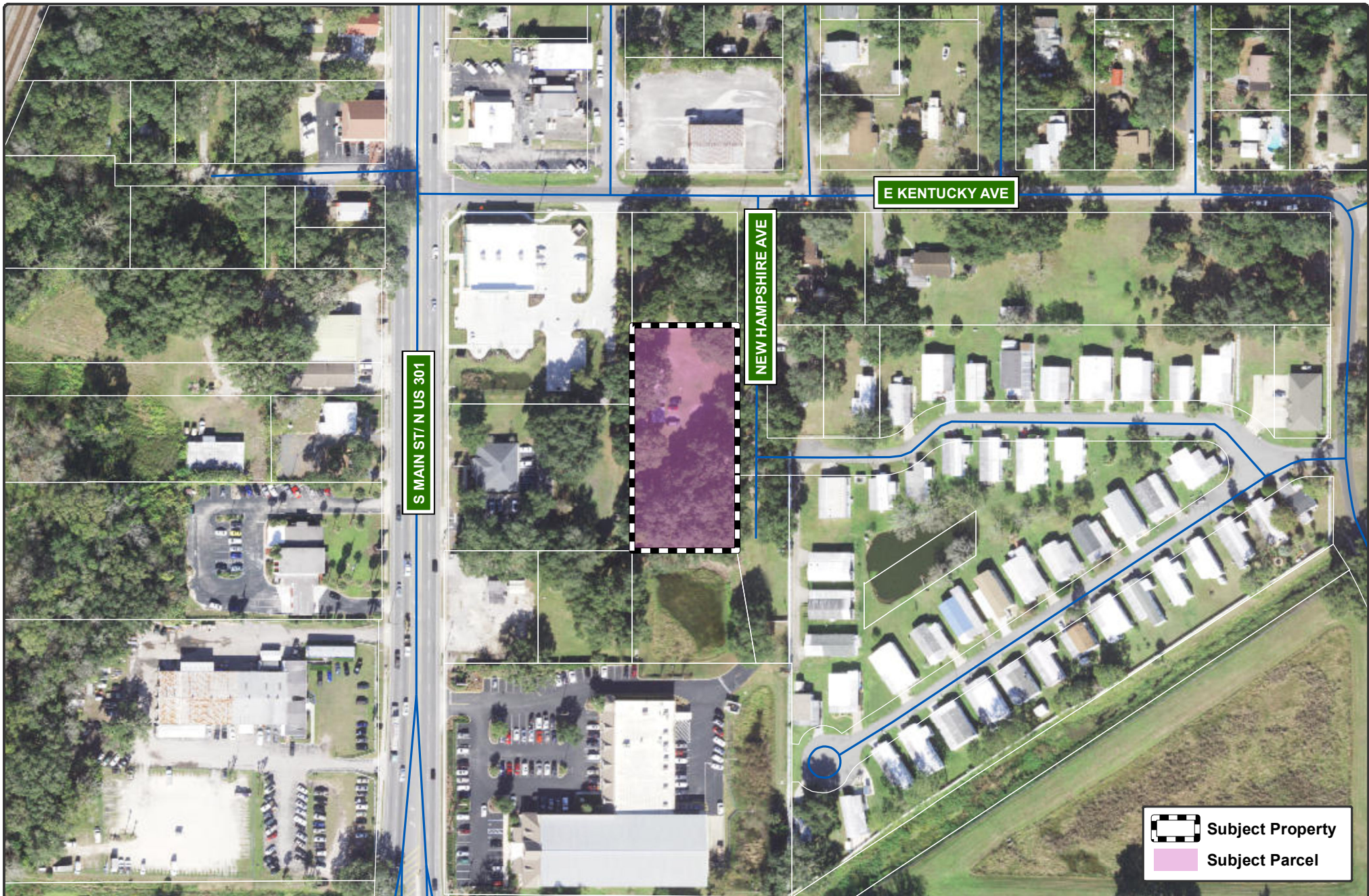
APPLICANT: PSL Construction, LLC

The applicant is seeking approval from the City Commission, for a 3,148 sq. ft. office and storage warehouse.

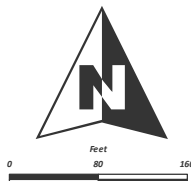
Project SP 2108-007 is in compliance with the Land Development Regulations and Design District Standards.

DATED: 06/20/2023


Terri O'Neal
Planning Manager, Development Services



**CITY OF
WILDWOOD**
100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



SP 2108-007
PSL HEADQUARTERS
PARCEL G07-095

 **Subject Property**
 **Subject Parcel**

MAP 1B

**LOCATION
MAP**

**SEPTEMBER
2021**

PSL CONSTRUCTION **OFFICE AND WAREHOUSE - SITE PLAN** **805 NEW HAMPSHIRE ST.** **WILDWOOD, FLORIDA** **DOWNTOWN DESIGN DISTRICT**

SITE NOTES:

- Storm water Erosion and Sedimentation Controls to be installed before any land disturbing activities commence.
- Stabilized Construction Entrance/Exit shall be located at the same intended location of the Finalized parking entrance/exit, and shall be in the form of stabilize and compacted rocks of various size.
- Silt fence and erosion control measures are to be used around perimeter of construction site.

Pre-Development Impervious:

Block Building, 12x18 = 216 sf
 Residential Structure = 318 sf
 Pole Barn = 315 sf
 Driveway = 354 sf
 Total = 2260 sf

Post-Development Proposed Impervious:

Parking and Driveway = 325 sf
 Buildings = 1621 (storage) + 1521 (office) + 216 (block bld) = 3358 sf
 Total = 6604 sf
 Net Increase Impervious = 4344 sf

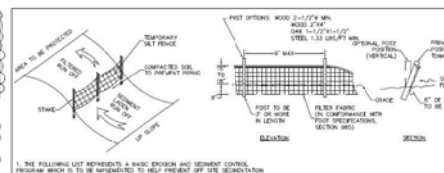
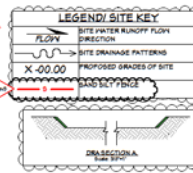
FIRE HYDRANT
 LOCATED @ CORNER OF NEW HAMPSHIRE
 AVE. & KENTUCKY AVE. WITHIN 225 FT.
 FROM PROPERTY AND LESS THAN 500'
 FROM THE PROPOSED STRUCTURE.
 BUILDING CONSTRUCTION TYPE V-3150 SF
 REQUIRED FIRE FLOW = 1300 GPM @ 20 PSI
 RESIDUAL FOR 2 HOURS DURATION
 PROVIDED BY CITY OF WILDWOOD

**6" STABILIZED LIMEROCK -
 STABILIZED CONSTRUCTION
 ENTRANCE DETAIL**

**SHAWN AVENUE
 (50' WIDE RIGHT OF WAY)**

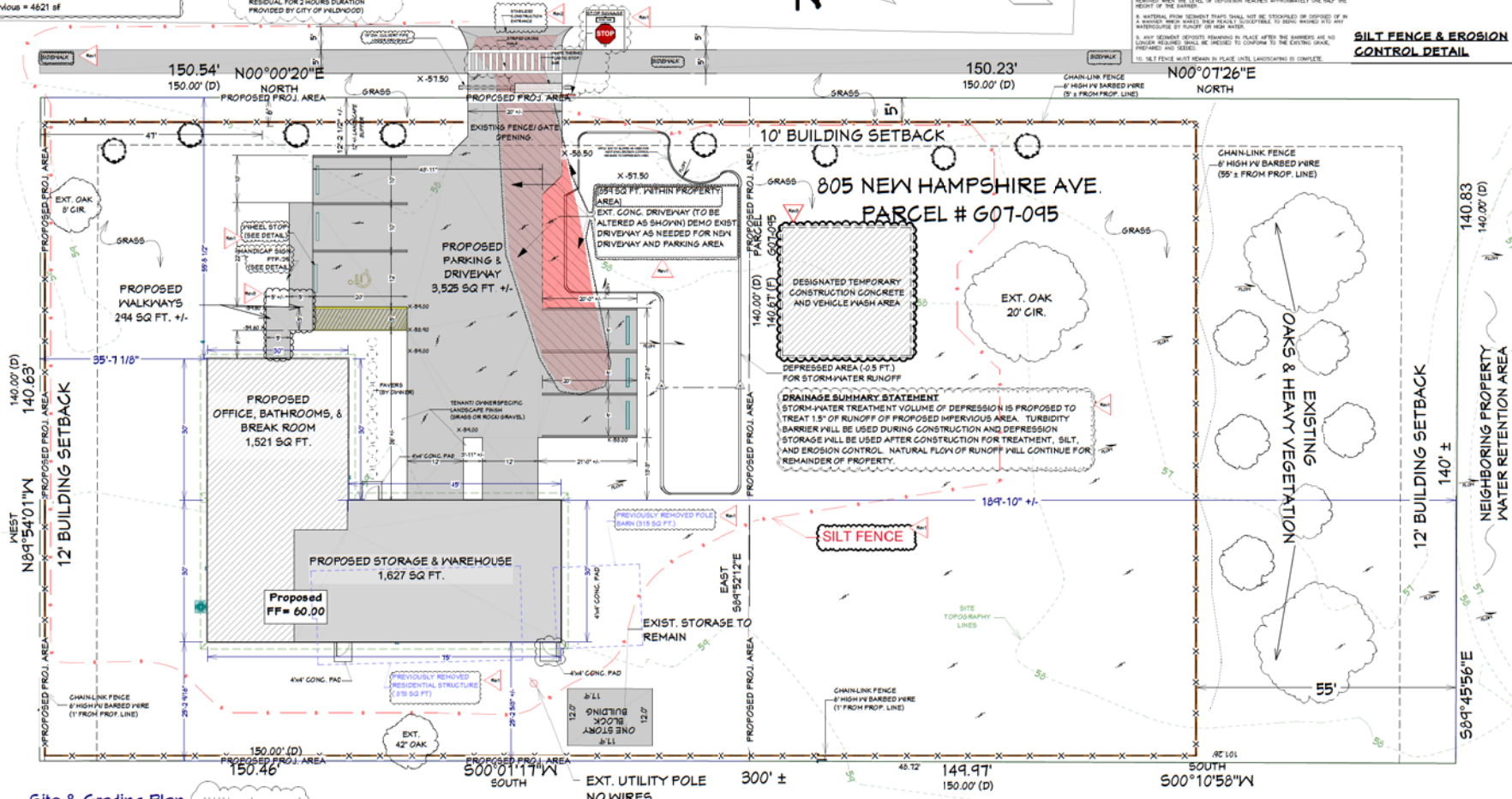
**NEW HAMPSHIRE AVENUE
 (40' WIDE RIGHT OF WAY)**

N



1. THE FOLLOWING LIST REPRESENTS A BASIC EROSION AND SEDIMENT CONTROL MEASURES TO BE INSTALLED BEFORE ANY LAND DISTURBING ACTIVITIES COMMENCE.
2. TEMPORARY EROSION CONTROL TO BE INSTALLED DURING CONSTRUCTION IT SHALL BE MAINTAINED AT ALL TIMES. THESE MEASURES SHALL BE MAINTAINED UNTIL THE FINAL CONSTRUCTION IS COMPLETED. ANY EROSION CONTROL MEASURES SHALL BE MAINTAINED AT ALL TIMES.
3. PERMANENT EROSION AND SEDIMENT CONTROL MEASURES SHALL BE INSTALLED AT THE EARLIEST PRACTICAL TIME CONSIDERING THE CONSTRUCTION SCHEDULE. ONE OF THE FIRST CONSTRUCTION ACTIVITIES SHALL BE THE PLACEMENT OF PERMANENT AND TEMPORARY EROSION AND SEDIMENT CONTROL MEASURES AROUND THE PERIMETER OF THE PROJECT ON THE FINAL WORK AREA TO PREVENT THE PROJECT ADJACENT PROPERTIES AND WATER RESOURCES.
4. TEMPORARY EROSION AND SEDIMENT CONTROL MEASURES SHALL BE CONSTRUCTED WITH PERMANENT MEASURES TO AVOID EROSION, SEDIMENT AND CONSTRUCTION MATERIALS FROM ENTERING ADJACENT PROPERTIES OR WATER RESOURCES.
5. EROSION AND SEDIMENT CONTROL MEASURES SHALL BE MAINTAINED THROUGHOUT THE CONSTRUCTION PERIOD. TEMPORARY MEASURES SHALL NOT BE CONSTRUCTED FOR EXISTENCE IN LIEU OF PERMANENT MEASURES.
6. NECESSARY REPAIRS TO BARRIERS OR REPLACEMENT OF BARRIERS SHALL BE COMPLETED PROMPTLY.
7. SEDIMENT DEPOSITS SHALL BE REMOVED AFTER EACH RAINFALL. THEY MUST BE REMOVED WHEN THE LEVEL OF SEDIMENT EXCEEDS THE MAXIMUM HEIGHT OF THE BARRIER.
8. WATER MUST BE KEPT FROM RUNOFF TO PREVENT IT FROM BEING IN CONTACT WITH THE BARRIER OR FROM BEING IN CONTACT WITH THE BARRIER.
9. ANY SEDIMENT DEPOSITS REMAINING IN PLACE AFTER THE BARRIERS ARE MAINTAINED SHALL BE REMOVED TO PREVENT IT FROM BEING IN CONTACT WITH THE BARRIER.
10. SILT FENCE MUST REMAIN IN PLACE UNTIL LANDSCAPING IS COMPLETE.

**SILT FENCE & EROSION
 CONTROL DETAIL**



City of Wildwood, Florida

Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant is seeking a favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for a 3,148 square foot office/storage warehouse on 0.49 acres MOL. The subject property is generally located east of N. US 301 & E Kentucky Avenue.

Case: SP 2108-007 PSL Headquarters

Parcel: G07-095

Owner: PSL Properties, LLC

Applicant: PSL Construction, LLC

Under Land Development Regulation (LDR) § 1.7(B)(1), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed site plans.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 4.4, the Special Magistrate recommends approval.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate, City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: SP 2201-010 Hotel Site @ Lot 12 (Turkey Run)

REQUESTED ACTION: Special Magistrate recommends approval with the understanding of fire department restrictions.

CONTRACT: Vendor/Entity:
Effective Date: Termination Date:
Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

CASE NUMBER	SP 2201-010 Hotel Site @ Lot 12 (Turkey Run)
PARCEL NUMBER	G05V012
ACREAGE	5.03 +/-
PROPERTY LOCATION	The property is generally located approximately 0.07 miles north of C 466A and approximately 0.07 miles west of E C 462.
OWNER	Turkey Run, LLC
APPLICANT	Sunshine Fund Villages, LLC

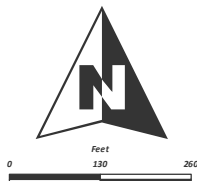
The applicant is seeking approval from the City Commission for the construction of two, four-story hotel buildings totaling 112,034 SF. The westerly building will contain 92 rooms and the easterly building will contain 124 rooms. Connection to the proposed Inspiration Drive for secondary ingress/egress is shown on the site plan. The Turkey Run Planned Development Agreement requires the construction of Inspiration Drive upon the development of Lot 3. However, to ensure compliance with NFPA 1141:Table 5.1.4.1(a), Inspiration Drive will need to be constructed prior to the issuance of a certificate of occupancy for the easterly hotel building (Lot 12A).

SP 2201-010 meets the criteria set forth in the Turkey Run Planned Development, Land Development Regulations, and Design District Standards.


DATED: 06/13/2023
Amanda Bush
Planner, Development Services



**CITY OF
WILDWOOD**
100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov

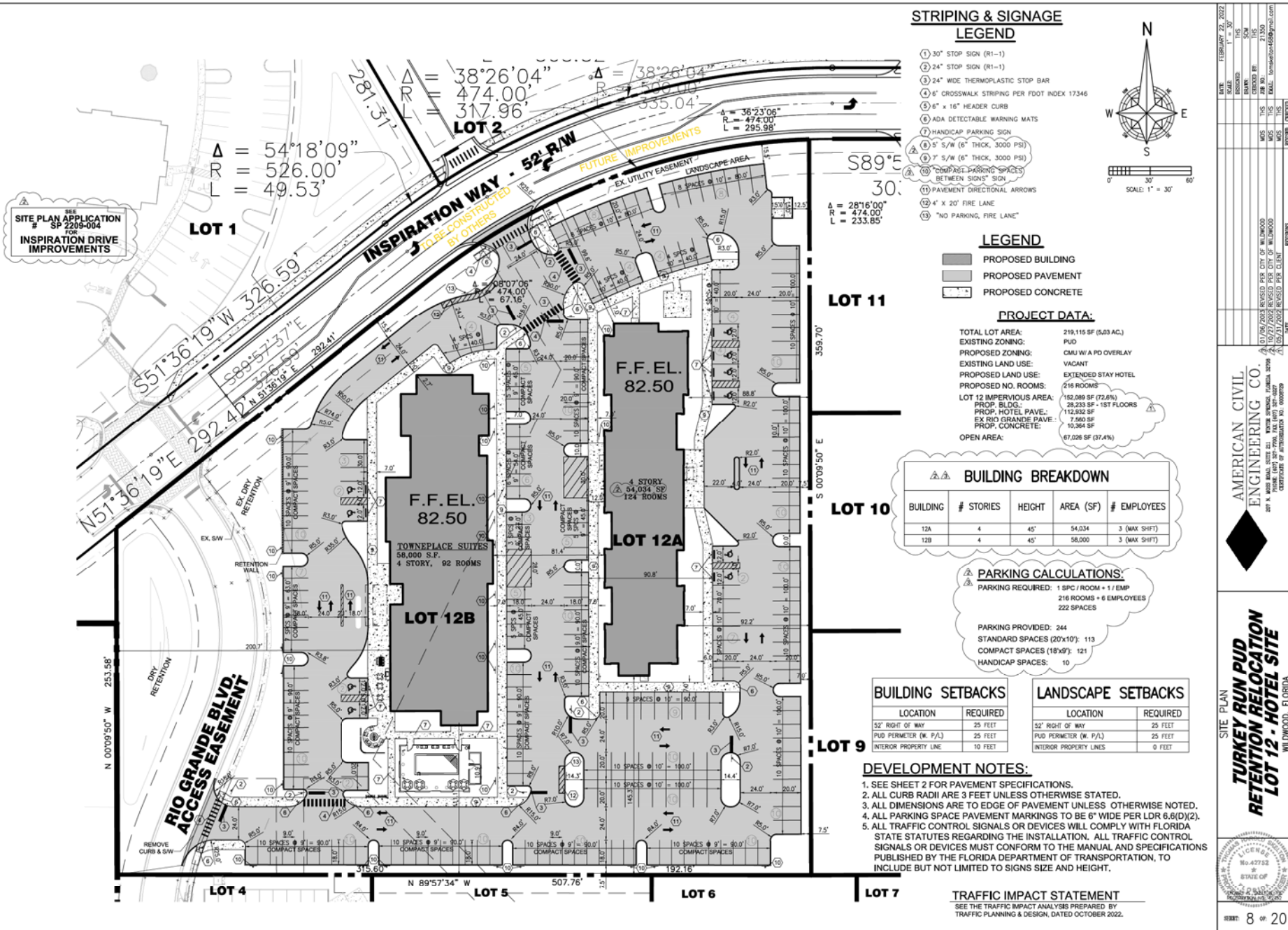


SP 2201-010
HOTEL SITE @ LOT 12 - TURKEY RUN PUD
PARCEL G05V012

MAP 1B

**LOCATION
MAP**

**FEBRUARY
2022**



City of Wildwood, Florida

Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant is seeking a favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for the construction of two, four-story hotel buildings totaling, 112,034 sq ft. The westerly building will contain 92 rooms and the easterly building will contain 124 rooms on 5.03 acres MOL. Connection to the proposed Inspiration Drive for secondary ingress/egress is shown on the site plan. The Turkey Run Planned Development Agreement requires the construction of Inspiration Drive upon the development of Lot 3. However, to ensure compliance with NFPA 1141:Table 5.1.4.1(a), Inspiration Drive will need to be constructed prior to the issuance of a certificate of occupancy for the Easterly hotel building (Lot 12A). The subject property is generally located approximately 0.07 miles north of C 466A and approximately 0.07 miles west of E C 462.

Case: SP 2201-010 Hotel Site @ Lot 12 (Turkey Run)

Parcel: G05V012

Owner: Turkey Run, LLC

Applicant: Sunshine Fund Villages, LLC

Under Land Development Regulation (LDR) § 1.7(B)(1), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed site plans.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 4.4, the Special Magistrate recommends approval with the understanding of the fire department restrictions.

Dated: June 13, 2023


Lindsay C.T. Holt
Special Magistrate, City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: SP 2211-001 Trailwinds Village Target

REQUESTED ACTION: Special Magistrate recommends approval of the proposed site plan.

CONTRACT: Vendor/Entity:
Effective Date: Termination Date:
Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case No: SP 2211-001 Trailwinds Village Target

Parcel Number(s): G04LOF-002 and G04LOF-001

Acreage: 12.21 +/-

Property Location: The subject property is generally located at the intersection of Spanish Harbor Dr and Little Rock Dr, approximately 0.08 miles north of C 466A.

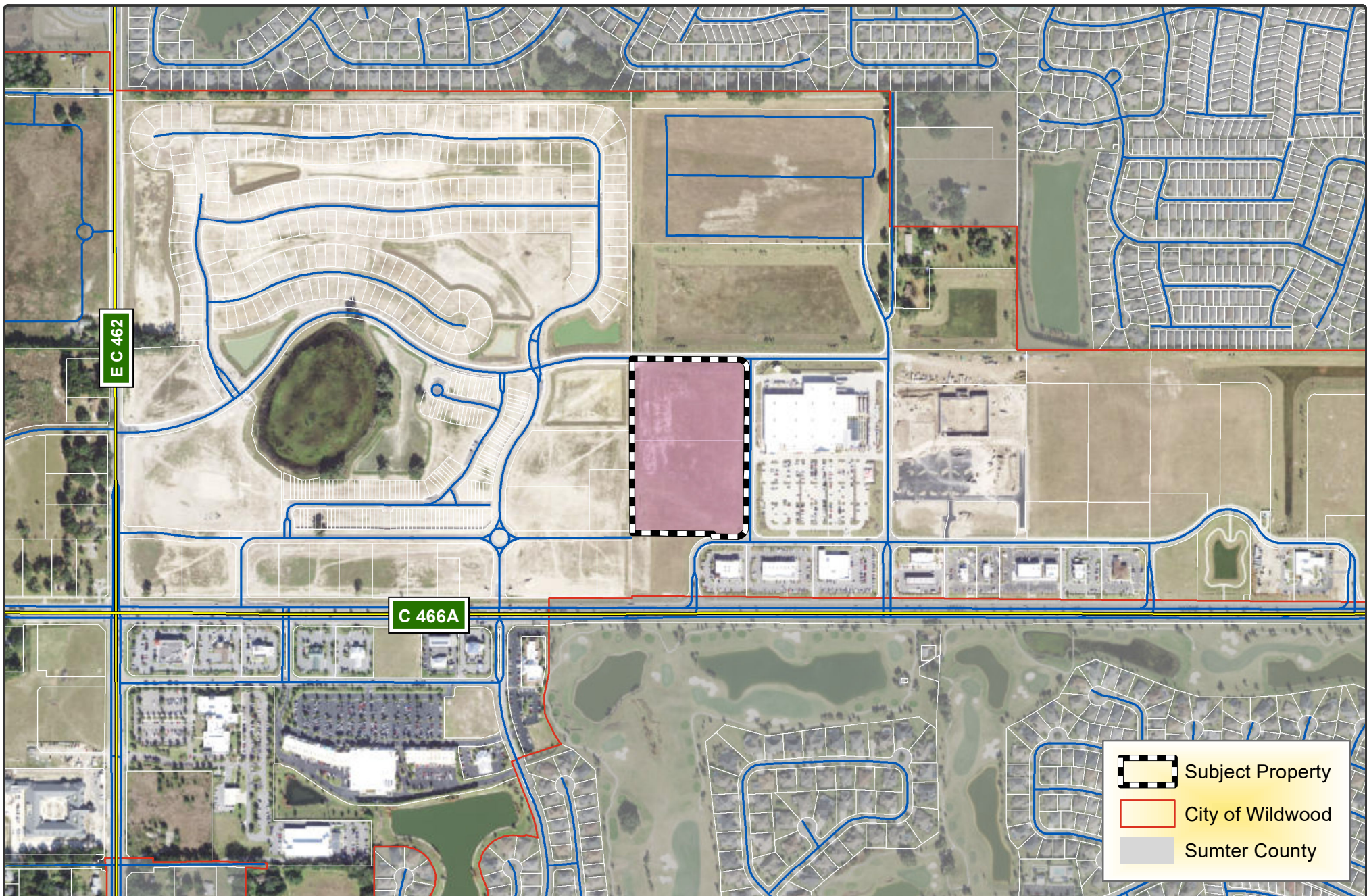
Owner/Applicant: Word Family, LLC

The applicant is seeking approval from the City Commission for the construction of a one hundred thirty-six thousand and six hundred eighty-five (136,685) square foot commercial retail building and associated infrastructure improvements, parking, and drive aisles.

SP 2211-001 meets the criteria set forth within the Land Development Regulations and the Design District Standards.



DATED: 06/19/2023
Shaun Raja
Planner I, Development Services



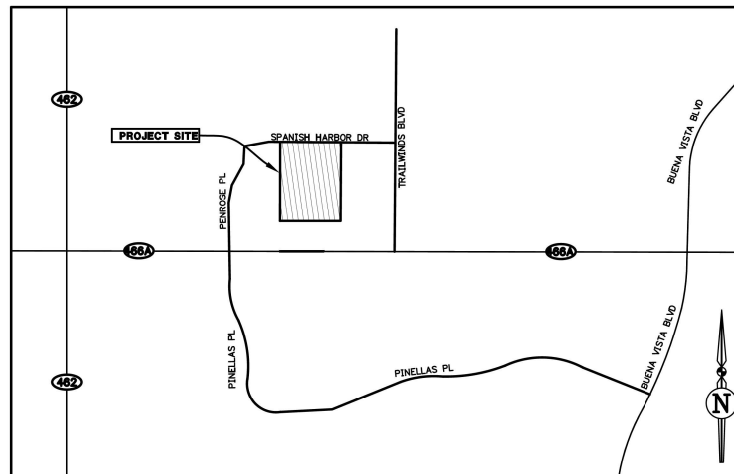
 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 Feet 0 330 660	SP 2211-001 TRAILWINDS VILLAGE - TARGET PARCELS G04LOF-001 & G04LOF-002	MAP 1B LOCATION MAP MAY 2023
--	---	---	--	--

1. PROJECT DESCRIPTION: ADDITION OF 136,000 SF COMMERCIAL RETAIL BUILDING AND ASSOCIATED INFRASTRUCTURE IMPROVEMENTS

2. OWNER: WORD FAMILY, LLC
ADDRESS: 1211 N WESTSHORE BLVD, SUITE 801, TAMPA FL 33607
PHONE NUMBER: (813) 392-7584
EMAIL: JHART@CARLAYGROUP.COM

3. AUTHORIZED AGENT: LOGAN PETERS, P.E.
ADDRESS: 3530 NW 43RD ST, GAINESVILLE, FL 32606
PHONE NUMBER: (352) 375-8999
EMAIL: LOGAN.PETERS@UBPRO.COM

STRAILWINDS VILLAGE - TARGET	
SHEET INDEX	
SHEET NO.	TITLE
C0.C	COVER SHEET
C1.C	LEGEND, ABBREVIATIONS, & NOTES
C1.1	STORMWATER POLLUTION PREVENTION PLAN
C1.2	STAGING PLAN
C1.3	EROSION, EROSION, AND SEDIMENTATION CONTROL PLAN
C1.4	EXISTING SOIL CONDITIONS PLAN
C2.C	MASTER SITE PLAN
C2.1	BUILDING WALK AROUND PLAN
C2.2	MASTER DRAINAGE PLAN
C3.1	PAVING GRADING & DRAINAGE PLAN - SOUTH
C3.2	PAVING GRADING & DRAINAGE PLAN - CENTRAL
C3.3	PAVING GRADING & DRAINAGE PLAN - NORTH
C4.C	MASTER UTILITY PLAN
C4.1	TRUCK ACCESS AND LOADING DOOR MANUEVER
C4.2	TRUCK ACCESS AND LOADING DOOR MANUEVER
C6.C	DETAILS AND NOTES
C6.1	DETAILS AND NOTES
C6.2	UTILITY DETAILS AND NOTES
C6.3	UTILITY DETAILS AND NOTES
C6.4	UTILITY DETAILS AND NOTES
C6.5	UTILITY DETAILS AND NOTES
C001-4141	ARCHITECTURAL PLANS
LS-1 - 1B-5	LANDSCAPE AND IRRIGATION PLANS
LS-1 - 1B-5	LANDSCAPE AND IRRIGATION PLANS



LOCATION MAP
T = 1280'

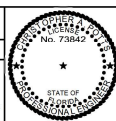
AGENCY	PERMIT #	SUBMITTED	STATUS
CITY OF WILDWOOD		3/2/2023	UNDER REVIEW
S.W.F.W.M.D.			TO BE SUBMITTED
F.D.E.P.			TO BE SUBMITTED

LEGAL DESCRIPTION PER TITLE COMMITMENT

PARCELS OF 1-AND OF 20 TRAILWAYS VINEY REPLIT ONE, ACCORDING TO THE MAPOR PLAT THEREOF RECORDED IN PLAT BOOKS 17, PAGES 44 THROUGH 448 OF THE PUBLIC RECORDS OF SUMMIT COUNTY, UTAH, TOGETHER WITH NON-EXCLUSIVE PERPETUAL EASEMENTS OVER AND ACROSS THE COMMON AREAS PURSUANT TO SECTION 2.1; UTILITY EASEMENTS PURSUANT TO SECTION 2.7; ACCESS AREAS EASEMENTS PURSUANT TO SECTION 2.8; AND RION EASEMENTS PURSUANT TO SECTION 2.9; OF, OR CERTAIN PORTIONS OF, THE LANDS DESCRIBED IN THE MAPOR PLAT THEREOF RECORDED IN PLAT BOOKS 17, PAGES 44 THROUGH 448 OF THE PUBLIC RECORDS BOOK 326B, PAGE 328 AND THE AMENDMENTS THERETO RECORDED IN OFFICIAL RECORDS BOOK 326C, PAGE 568. OFFICIAL RECORDS BOOK 326F, PAGE 328 AND THE AMENDMENTS THERETO RECORDED IN OFFICIAL RECORDS BOOK 326G, PAGE 568. OFFICIAL RECORDS BOOK 326I, PAGE 485. OFFICIAL RECORDS BOOK 325J, PAGE 242. OFFICIAL RECORDS BOOK 325K, PAGE 261. OFFICIAL RECORDS BOOK 325L, PAGE 267. OFFICIAL RECORDS BOOK 325M, PAGE 267 AND OFFICIAL RECORDS BOOK 365J, PAGE 102, ALL OF THE PUBLIC RECORDS OF SUMMIT COUNTY, UTAH, CONTAINING 12.91 ACRES MORE OR LESS.

[illegible]

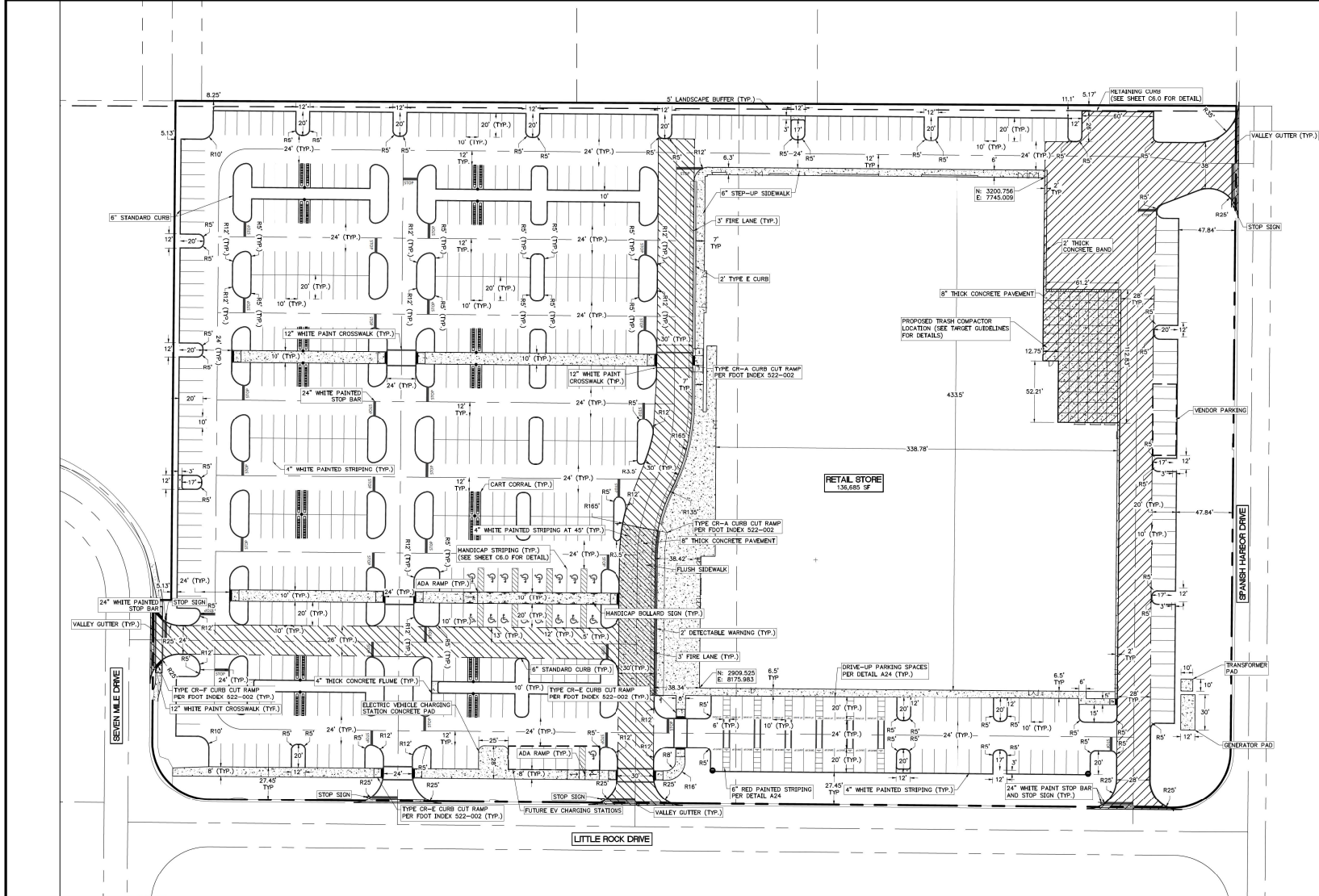
Christopher A Potts DESIGNATED A Public Utility or ADVISES REGULATORY GROUP FOR: ADVISES REGULATORY GROUP DATE: 2023-02-22 14:09:45 -0500	
ENGINEER OF RECORD:	CHRISTOPHER A. POTTS, P.E. FLORIDA LICENSE NO. 73842
THIS DOCUMENT HAS BEEN ELECTRONICALLY SIGNED AND SEALED BY CHRISTOPHER A. POTTS, P. ON MAR 22, 2023 USING A DIGITAL SIGNATURE. PRINTED COPIES OF THIS DOCUMENT ARE NOT CONSIDERED SIGNED AND SEALED, AND THE SIGNA MUST BE VERIFIED ON ANY ELECTRONIC COPIES.	



JBPro
CIVIL ENGINEERING | LAND PLANNING
SURVEYING | CONSTRUCTION SERVICES

Gainesville: (352) 375-8999 | St. Augustine: (904) 789-8999
Toll Free: (844) Go-JBPro | E-mail: contact@jbpro.com

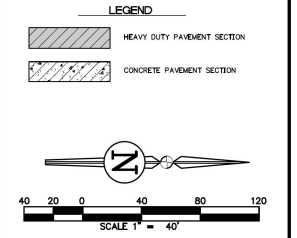
SHEET TITLE:		DATE:	
COVER SHEET		MARCH 2023	
		PROJECT NO:	
CLIENT:		PROJECT:	
BARCLAY GROUP WILDWOOD, FLORIDA		TRAILWINDS VILLAGE - TARGET	
		SHEET NO:	
		C0.0	



- DIMENSION NOTES**
1. THE PROPOSED DESIGN IS PARALLEL AND PERPENDICULAR TO THE SPANISH HARBOR DRIVE ROW LINE ALONG THE NORTH SIDE PROPERTY LINE.
 2. REFER TO PROJECT BOUNDARY AND TOPOGRAPHIC SURVEYS PREPARED BY SPMS DATED 3/17/2022 FOR MORE DETAILED SURVEY INFORMATION OF THE SUBJECT PARCEL.
 3. CONTRACTOR SHALL FAMILIARIZE THEMSELVES WITH THE PROJECT SURVEY AND RECORD DRAWINGS, AND SHALL VERIFY EXISTING SITE CONDITIONS. ANY APPARENT DISCREPANCIES OR ADDITIONAL PERTINENT INFORMATION SHALL BE BROUGHT TO THE PROJECT ENGINEER'S ATTENTION IMMEDIATELY.
 4. ALL DIMENSIONS AND RADII SHOWN ARE DIMENSIONED TO EDGE OF PAVEMENT OR FACE OF CURB, UNLESS OTHERWISE SPECIFIED.

- STRIPING NOTES**
1. PARKING LOT STRIPING SHALL BE TRAFFIC PAINT CONFORMING TO FOOT INDEX NO. 711-001.
 2. ALL STRIPING SHALL BE IN ACCORDANCE WITH FOOT INDEX NO. 711-001.
 3. ALL PARKING & STRIPING SHALL MEET THE LATEST FLORIDA HANDICAP ACCESSIBILITY CODE & THE LATEST FOOT AND MUTCO STANDARDS. SEE DETAIL SHEET FOR HANDICAP STRIPING DETAIL.

- CONCRETE JOINTING NOTES**
1. 6" THICK CONCRETE SHALL REQUIRE 10'X10' JOINT CONTROL.
 2. SAW CUT DEPTH OF 2" IS RECOMMENDED.

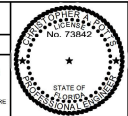


REVISIONS			
NO.	DATE	DESCRIPTION	DRWN

ENGINEER
OF RECORD
CHRISTOPHER A. POTTS, P.E.
FLORIDA LICENSE NO. 73842

THIS DOCUMENT HAS BEEN ELECTRONICALLY
SIGNED AND SEALED BY CHRISTOPHER A. POTTS, PE
ON MARCH 22, 2023 USING A DIGITAL SIGNATURE.

PRINTED COPIES OF THIS DOCUMENT ARE NOT
CONSIDERED SIGNED AND SEALED, AND THE SIGNATURE
MUST BE VERIFIED ON ANY ELECTRONIC COPIES.



JBPro

CIVIL ENGINEERING | LAND PLANNING
SURVEYING | CONSTRUCTION SERVICES

3530 NW 43rd Street | Gainesville, Florida 32606
4420 US-1 S, Suite 1 | St. Augustine, Florida 32086

Gainesville: (352) 375-8999 | St. Augustine: (904) 789-8999
Toll Free: (844) 60-JBPro | E-mail: contact@jbpro.com

SHEET TITLE: MASTER SITE PLAN		DATE: MARCH 2023
CLIENT: BARCLAY GROUP WILDWOOD, FLORIDA	PROJECT: TRAILWINDS VILLAGE - TARGET	PROJECT NO.: 450-22-04
		SHEET NO.: C2.0

City of Wildwood, Florida

Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant is seeking a favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for the construction of a one hundred thirty-six thousand and six hundred eighty-five (136,685) square foot commercial retail building and associated infrastructure improvements, parking, and drive aisles on 12.21 acres, MOL. The subject property is generally located at the intersection of Spanish Harbor Dr and Little Rock Dr, approximately 0.08 miles north of C 466A.

Case: SP 2211-001 Trailwinds Village Target

Parcels: G04LOF-002 & G04LOF-001

Owner: Word Family, LLC

Applicant: Logan B. Peters (JBPro)

Under Land Development Regulation (LDR) § 1.7(B)(1), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed site plans.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 4.4, the Special Magistrate recommends approval.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate, City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: SP 2211-007 Livano Wildwood

REQUESTED ACTION: Special Magistrate recommends approval of the proposed site plan, contingent upon the city attorney's approval of the utility easement.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case No:

SP 2211-007 Livano Wildwood

Parcel Number(s):

D08F003 and D08F005

Acreage:

21.31 +/-

Property Location:

The subject property is generally located along Bellwether Lane, approximately 0.29 miles east of CR 103

Owner/Applicant:

Oxford Land LLC and Sumter Retirement Cottages LLC

The applicant is seeking approval from the City Commission for 248 residential units (5 four-story multi-family buildings), a six thousand three hundred fifty-seven square foot clubhouse, a dog park, and a pool area, with associated parking and drive aisles.

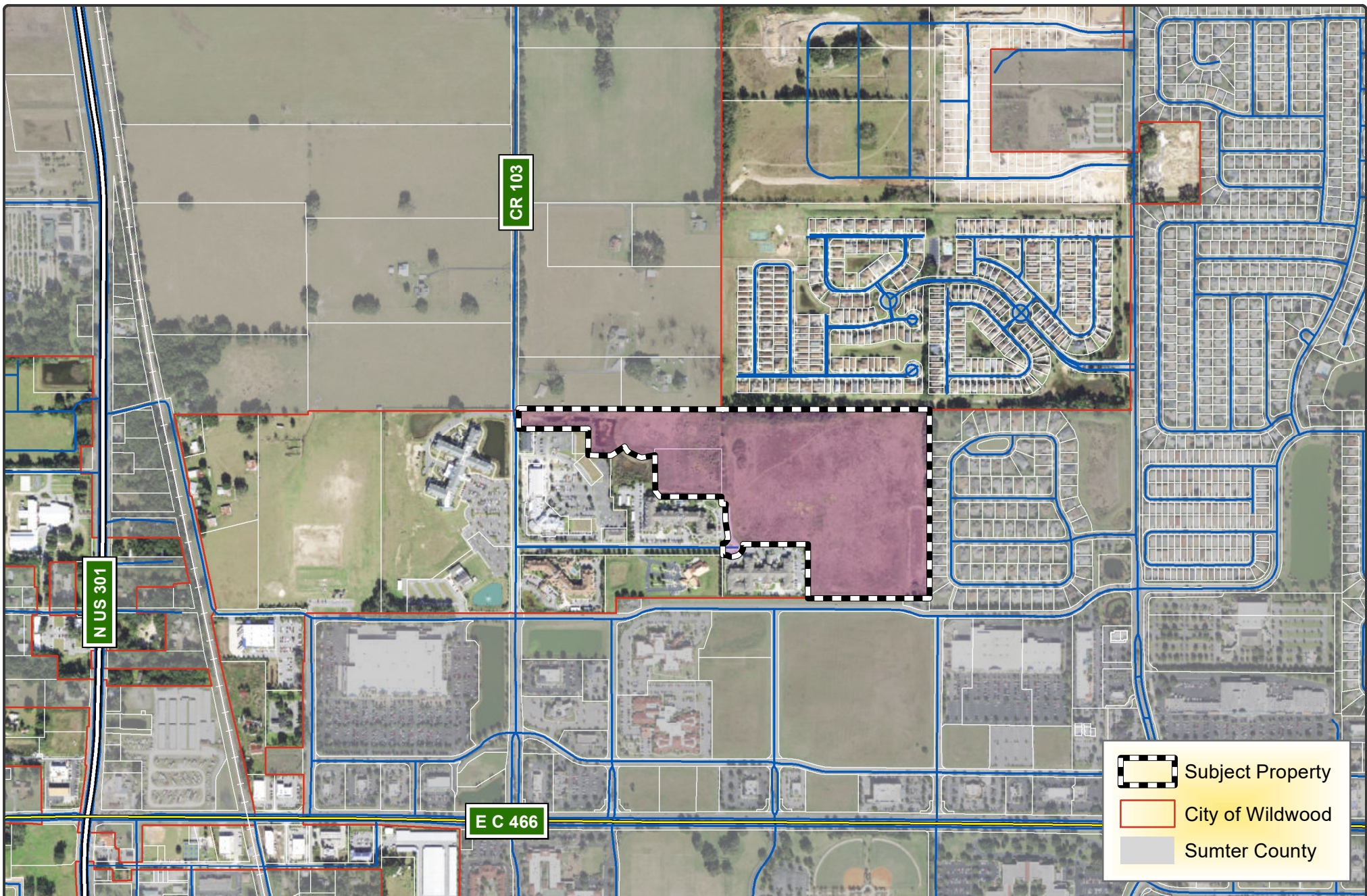
SP 2211-007 meets the criteria set forth within the Land Development Regulations and the Design District Standards.

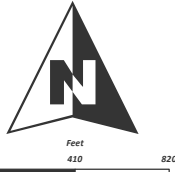


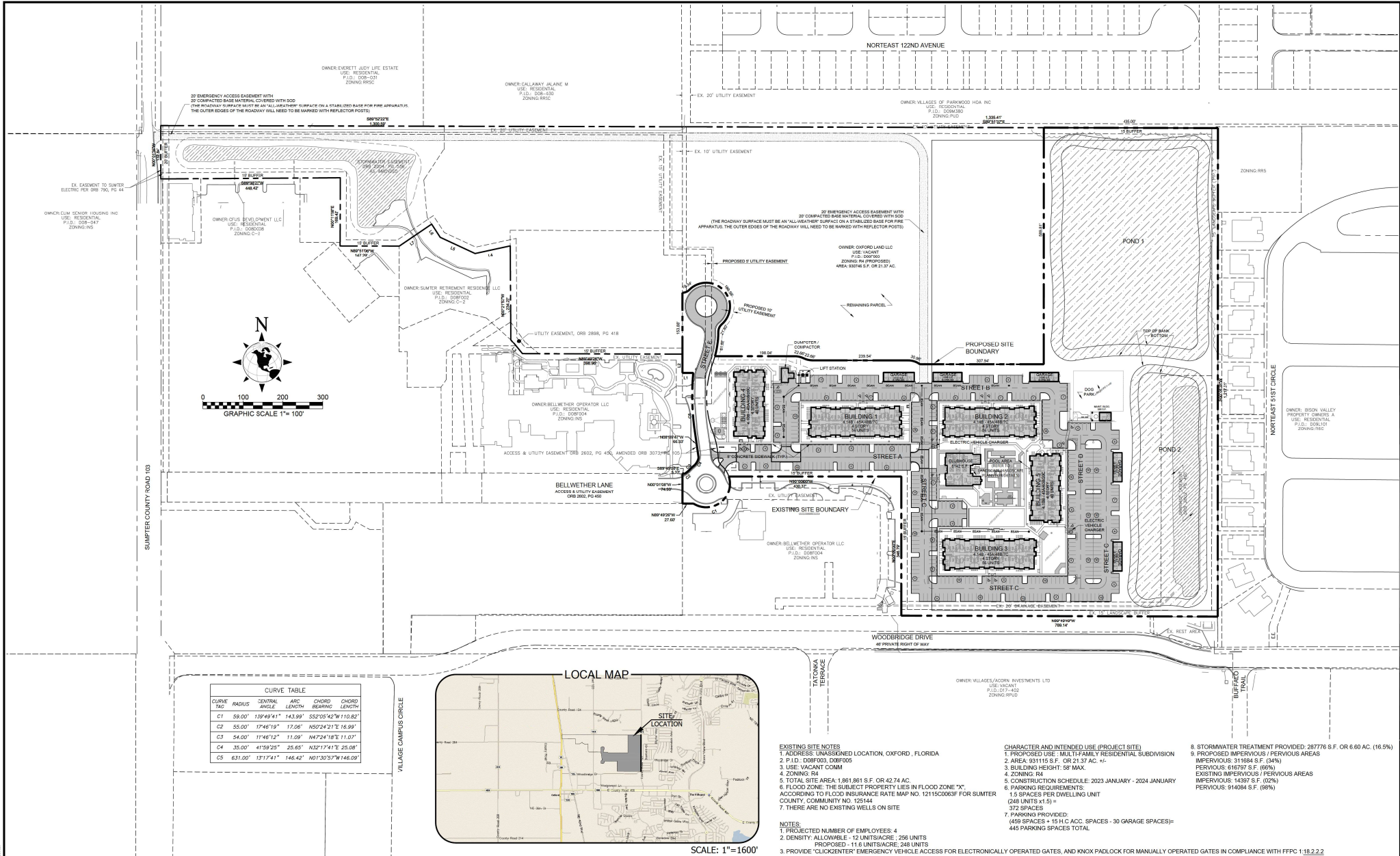
DATED: 06/19/2023

Shaun Raja

Planner I, Development Services



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov		SP 2211-007 LIVANO - WILDWOOD PARCELS D08F003 & D08F005	MAP 1B LOCATION MAP MAY 2023
--	---	---	---	---



STAMP		DATE 08-22-2022		PROJECT DW		DRAWING SP		DRAWN SPM		CHECKED BMM		SCALE 1"=100'		SHEET 5		OF 29	
02-24-23		MISC. REVISIONS PER COMMENTS		SPM													
01-26-23		MISC. REVISIONS PER COMMENTS		SPM													
NO.		DATE		REVISION DESCRIPTION		BY											

M

MORRIS ENGINEERING AND CONSULTING, LLC
Civil Engineering and Land Development Consulting
8977 Professional Parkway East, Suite B, Lakewood Ranch, Florida 34201 C.A.S. 350 941-446-0441 www.morrisengineering.com

City of Wildwood, Florida

Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant is seeking a favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for 248 residential units (5 four-story multi-family buildings), a six thousand three hundred fifty-seven square foot clubhouse, a dog park, a pool area, associated parking, and drive aisles on 21.31 acres, MOL. The subject property is generally located along Bellwether Lane, approximately 0.29 miles east of CR 103.

Case: SP 2211-007 Livano Wildwood

Parcels: D08F003 & D08F005

Owner: Oxford Land LLC and Sumter Retirement Cottages LLC

Applicant: Jason Bailey – LIV Development LLC

Under Land Development Regulation (LDR) § 1.7(B)(1), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed site plans.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 4.4, the Special Magistrate recommends approval.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate, City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: SP 2212-006 CVC-ASC Lot 9 Oxford Pointe

REQUESTED ACTION: Special Magistrate recommends approval.

CONTRACT: Vendor/Entity:
Effective Date: Termination Date:
Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

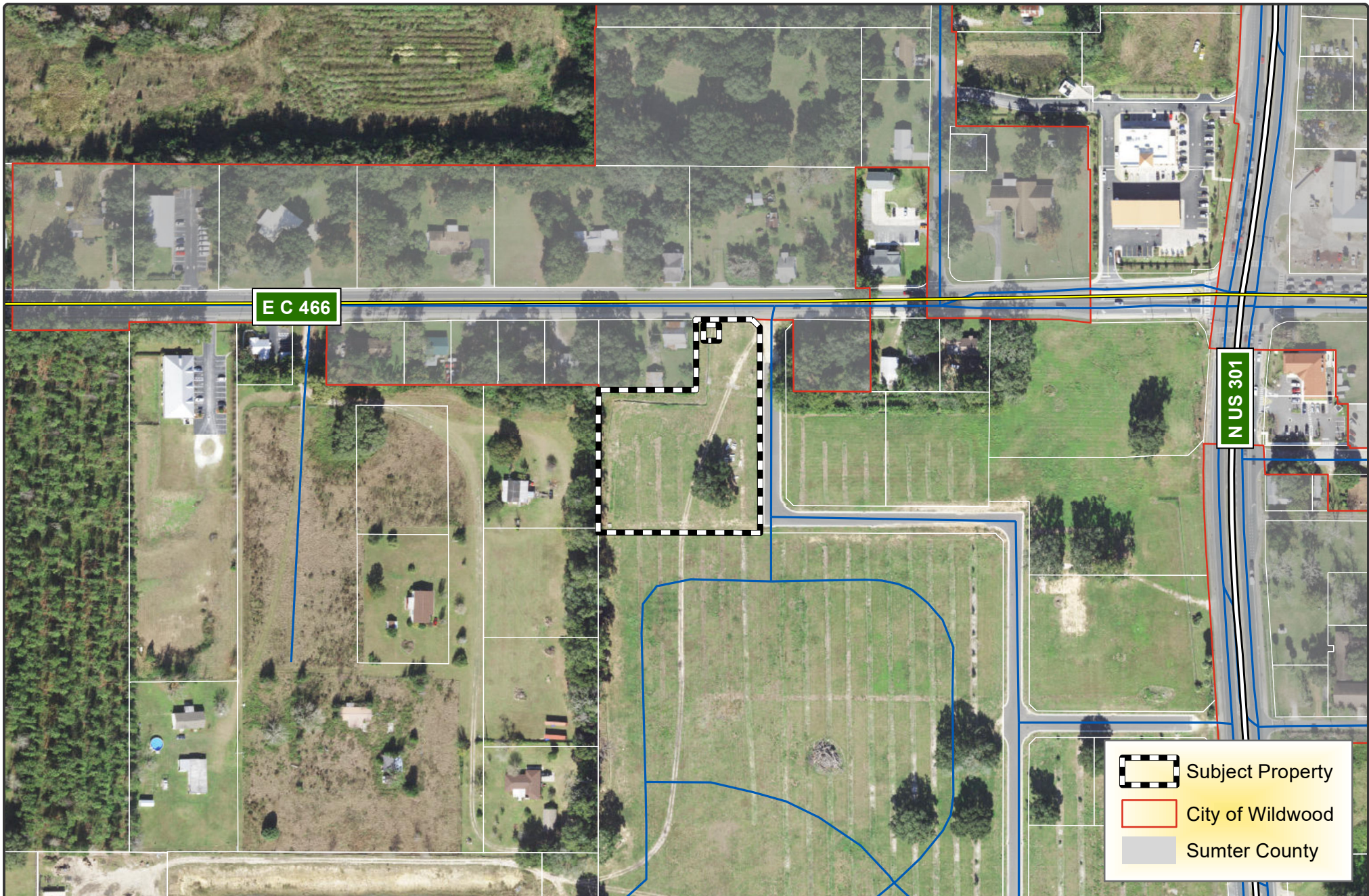
CASE NUMBER	SP 2212-006 CVC-ASC Lot 9 Oxford Pointe
PARCEL NUMBER(S)	D18E009
ACREAGE	2.32 +/-
PROPERTY LOCATION	The subject property is generally located at the southwest corner of E C 466 and Milton Lane, approximately 0.17 miles west of N US 301.
OWNER	Oxford Surgery Center Limited Liability Company
APPLICANT	Simon Abbott

The applicant is seeking approval from the City Commission for the construction of an 8,805 sq ft medical facility.

SP 2212-006 meets the criteria set forth in the Land Development Regulations and the Design District Standards.



DATED: 06/13/2023
Amanda Bush
Planner, Development Services



-  Subject Property
-  City of Wildwood
-  Sumter County



**CITY OF
WILDWOOD**
100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



SP 2212-006
CVC-ASC
PARCEL D18E009

MAP 1B
LOCATION
MAP
FEBRUARY
2023

City of Wildwood, Florida

Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant is seeking a favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for the construction of an 8,805 sq ft medical facility on 2.32 acres MOL. The subject property is generally located at the southwest corner of E C 466 and Milton Lane, approximately 0.17 miles west of N US 301.

Case: SP 2212-006 CVC-ASC Lot 9 Oxford Pointe
Parcel: D18E009
Owner: Oxford Surgery Center Limited Liability Company
Applicant: Simon Abbott

Under Land Development Regulation (LDR) § 1.7(B)(1), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed site plans.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 4.4, the Special Magistrate recommends approval.

Dated: June 13, 2023


Lindsay C.T. Holt
Special Magistrate, City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: SP 2301-003 VPSD #46

REQUESTED ACTION: Special Magistrate recommends approval of the proposed site plan.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case No: SP 2301-003 VPSD #46

Parcel Number(s): G32-008 and G32-027

Acreage: 0.99 +/-

Property Location: The subject property is generally located along CR 509 and Warm Springs Ave, approximately 1 mile east of N US 301

Owner/Applicant: Village Center Community Development District

The applicant is seeking approval from the City Commission for the construction of a nine thousand thirty-six (9,036) square foot public safety building and associated infrastructure improvements, parking, and drive aisles.

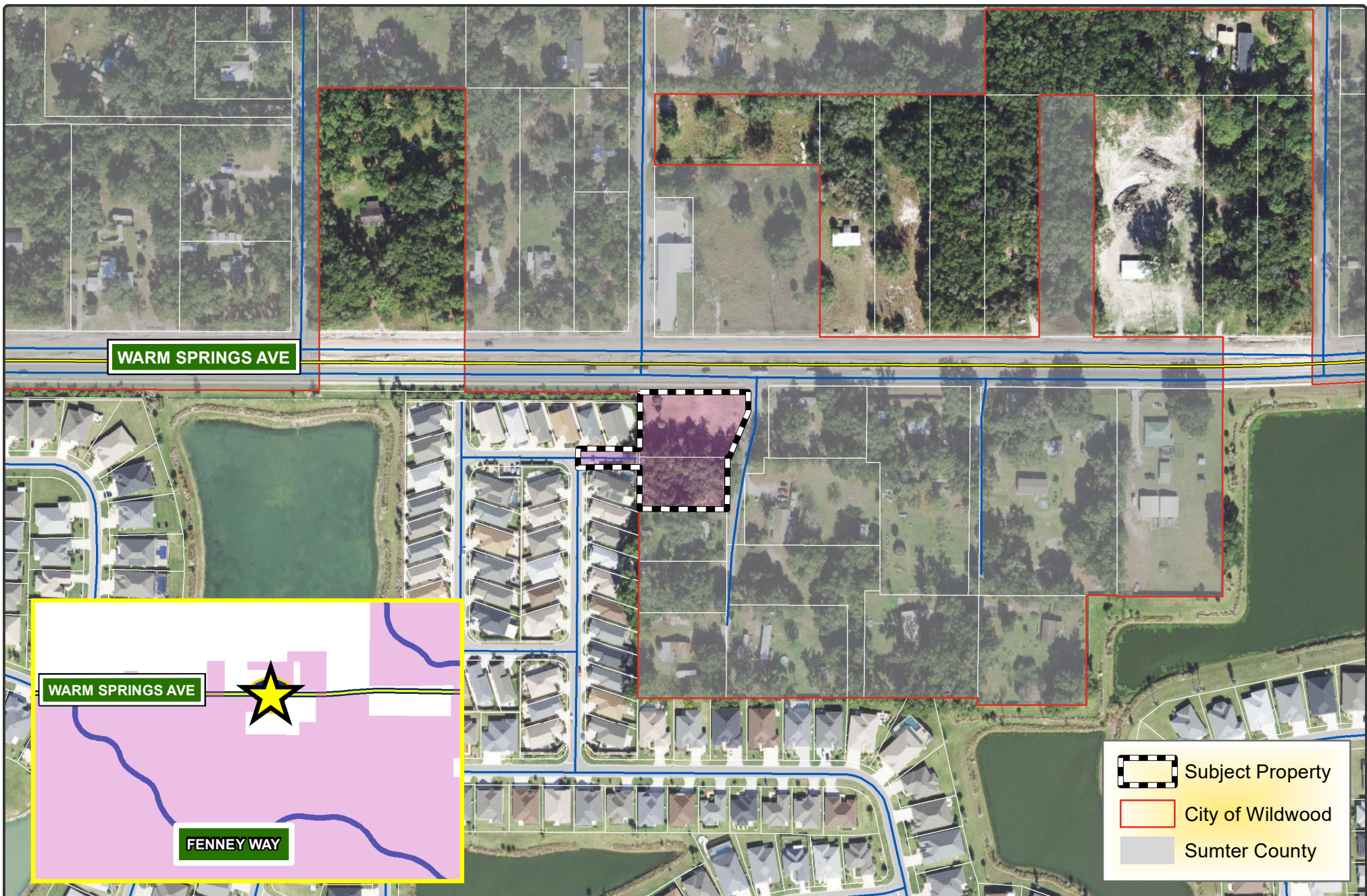
SP 2301-003 meets the criteria set forth within the Land Development Regulations and the Design District Standards.



DATED: 06/19/2023

Shaun Raja

Planner I, Development Services



**CITY OF
WILDWOOD**

100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



SP 2301-003

VPD #46

PARCELS G32-008 & G32-027

MAP 1B

**LOCATION
MAP**

**MAY
2023**

AGENCY	PERMIT #	SUBMITTED	STATUS
CITY OF WILDWOOD			IN REVIEW
SWFWMD	ERP# 43032972.107	01/10/2023	UNDER REVIEW
FDEP NPDES			UNDER REVIEW
FDEP WATER			UNDER REVIEW
FDEP SEWER			UNDER REVIEW



The Villages®

Community Development Districts

MAJOR SITE PLAN FOR VILLAGES PUBLIC SAFETY DEPT. (VPSD) STATION #46

Stephen M.
campbell

Digitally signed by Stephen
M. Campbell
Date: 2023.02.24 09:24:16
-05'00'

DATE	REVISIONS	BY
2/22/2023	CITY OF WILDWOOD COMMENTS #1	DMD

LEGAL DESCRIPTION

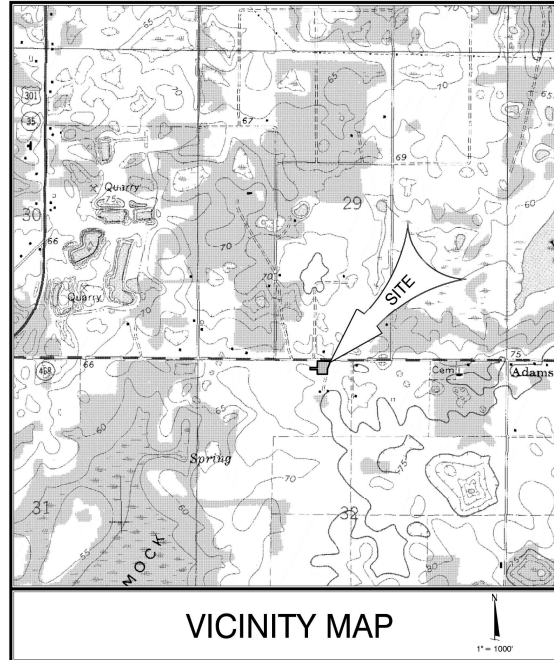
A PARCEL OF LAND LYING IN THE NE 1/4 OF THE NE 1/4 OF THE NW 1/4 OF SECTION 32, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGIN AT THE NORTHEAST CORNER OF TRACT "D" OF VILLAGE OF FENNEY BOUGAINVILLE VILLAS AS RECORDED IN PLAT BOOK 16, PAGES 11 & 11A OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE RUN SOUTH 89°42'01" EAST, ALONG THE SOUTH RIGHT-OF-WAY LINE OF COUNTY ROAD 488 / WARM SPRINGS AVENUE (A 115 FOOT WIDE PUBLIC RIGHT-OF-WAY), A DISTANCE OF 210.00 FEET TO A POINT ON THE EAST BOUNDARY OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 3006, PAGE 258 OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SOUTH RIGHT-OF-WAY LINE, RUN SOUTH 07°23'19" WEST, ALONG THE EAST BOUNDARY OF SAID LANDS, A DISTANCE OF 37.91 FEET; THENCE DEPARTING SAID EAST BOUNDARY, RUN SOUTH 22°42'39" WEST, A DISTANCE OF 12.48 FEET TO THE NORTHEAST CORNER OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 3233, PAGE 314 OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE RUN SOUTH 07°23'21" WEST, ALONG THE EAST BOUNDARY OF SAID LANDS, A DISTANCE OF 89.86 FEET TO THE SOUTHEAST CORNER OF SAID LANDS; THENCE DEPARTING SAID EAST BOUNDARY, RUN NORTH 89°36'59" WEST, ALONG THE SOUTH BOUNDARY OF SAID LANDS, A DISTANCE OF 171.00 FEET TO THE SOUTHWEST CORNER OF SAID LANDS; THENCE DEPARTING SAID SOUTH BOUNDARY, RUN NORTH 07°23'21" EAST, ALONG THE EAST LINE OF AFOREMENTIONED VILLAGE OF FENNEY BOUGAINVILLE VILLAS AS RECORDED IN PLAT BOOK 16, PAGES 11 & 11A, A DISTANCE OF 87.43 FEET TO THE SOUTHEAST CORNER OF TRACT "P" OF SAID VILLAGE OF FENNEY BOUGAINVILLE VILLAS; THENCE DEPARTING SAID EAST LINE, RUN NORTH 89°42'01" WEST, ALONG THE SOUTH LINE OF SAID TRACT "P", THE SOUTH RIGHT-OF-WAY LINE OF REDBUD LANE AND THE WESTERLY EXTENSION THEREOF, A DISTANCE OF 122.48 FEET; THENCE DEPARTING SAID WESTERLY EXTENSION, RUN NORTH 00°17'59" EAST, A DISTANCE OF 35.00 FEET TO A POINT ON THE NORTH RIGHT-OF-WAY LINE OF SAID REDBUD LANE; THENCE RUN SOUTH 89°42'01" EAST, ALONG SAID NORTH RIGHT-OF-WAY LINE AND THE NORTH LINE OF AFORESAID TRACT "P", A DISTANCE OF 122.53 FEET TO THE NORTHEAST CORNER OF SAID TRACT "P"; THENCE DEPARTING SAID NORTH LINE, RUN NORTH 0°23'21" EAST, ALONG AFORESAID EAST LINE OF VILLAGE OF FENNEY BOUGAINVILLE VILLAS, A DISTANCE OF 110.00 FEET TO THE POINT OF BEGINNING.

SAID LANDS CONTAINING 1.088 ACRES, MORE OR LESS.

NOTE:

THE LEGAL DESCRIPTION PROVIDED HEREON IS FOR PERMITTING AND/OR CONSTRUCTION PURPOSES ONLY AND SHOULD NOT BE USED FOR TRANSFER OF RIGHT, TITLE OR INTEREST.



SECTION 32; TOWNSHIP 19 SOUTH; RANGE 23 EAST
SUMTER COUNTY, FLORIDA
VERTICAL DATUM - NAVD 1988

Sheet List Table

01	COVER
02	MASTER DEVELOPMENT PLAN
03	DEMOLITION PLAN
04	SITE PLAN
05	GRADING PLAN
06	DRAINAGE PLAN
07	SANITARY SEWER PLAN
08	WATER AND IRRIGATION PLAN
09	SITE DETAILS
10	SITE DETAILS (2)
11	SITE DETAILS (3)
12	UTILITY DETAILS
13	EROSION CONTROL PLAN

NOTES:

1. THE STANDARD DETAILS FOR THIS PROJECT SHALL BE FOUND IN "THE VILLAGES, CONSTRUCTION & DEVELOPMENT MANUAL", DATED JULY 2022, PREPARED BY DIZIUR & ASSOCIATES, OR AS AMENDED BY THESE PLANS.
2. ALL UTILITY CONSTRUCTION SHALL BE TO FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION (FDEP) AND WILDOOD UTILITY DEPENDENT DISTRICT - SOUTH SUMTER UTILITY (WWUD-SSU) REQUIREMENTS.
3. ALL WATER AND SANITARY SEWER UTILITIES WITHIN UTILITY EASEMENTS SHALL BE OWNED & MAINTAINED BY WWUD-SSU.
4. ALL IRRIGATION UTILITIES SHALL BE OWNED AND MAINTAINED BY WILDOOD UTILITY DEPENDENT DISTRICT - FENNEY WATER CONSERVATION AUTHORITY (WWUD-FWCA).

WATER AND WASTE WATER UTILITIES
WILDOOD UTILITY DEPENDENT DISTRICT
SOUTH SUMTER UTILITY (WWUD-SSU)
884 OLD MILL RUN
THE VILLAGES, FL 32182
(352) 751-3899

ELECTRICAL POWER UTILITIES
DUKE ENERGY
4359 SE MARICAMP ROAD
OCALA, FL 34429
(352) 684-8500

IRRIGATION UTILITIES
WILDOOD UTILITY DEPENDENT DISTRICT
FENNEY WATER CONSERVATION AUTHORITY
(WWUD-FWCA)
884 OLD MILL RUN
THE VILLAGES, FL 32182
(352) 751-3899

SOLID WASTE COLLECTION
CITY OF WILDWOOD APPROVED FRANCHISE

CABLE TELEVISION/INTERNET
NEXT LINK COMMUNICATION, LLC
c/o MCDONOUGH DEVELOPMENT SERVICES
4450 NE 83RD ROAD
WILDOOD, FL 34785
(352) 748-6119

LANDSCAPE ARCHITECT
MICHAEL PAPE AND ASSOCIATES, P.A.
2351 S.E. 17TH STREET
OCALA, FL 34471
SUZANNE STANGL
(352) 351-3500

NATURAL GAS UTILITIES
TECO PEOPLES GAS
316 SW 33RD AVENUE
OCALA, FL 34474
(352) 401-3118

OWNER/DEVELOPER
VILLAGE CENTER COMMUNITY
DEVELOPMENT DISTRICT
884 OLD MILL RUN
THE VILLAGES, FL 32182
KENNETH BLOCKER, MANAGER
(352) 763-4022

ENGINEER
CLYMER FARNER BARLEY, Inc.
4450 NE 83RD ROAD
WILDOOD, FL 34785
STEPHEN M. CAMPBELL, P.E.
FL LIC. NO. 83530
(352) 748-3126

SURVEYOR
CLYMER FARNER BARLEY, Inc.
4450 NE 83RD ROAD
WILDOOD, FL 34785
KAYE JAMESON, PSM
FL REG. NO. 9912
(352) 748-3126

Stephen M. Campbell, State of Florida, Professional Engineer, License No. 83530. This item has been electronically signed and sealed by Stephen M. Campbell on the date indicated here using a SHA authentication code. Printed copies of this document are not considered signed and sealed and the SHA authentication code must be verified on any electronic copies.



CFB

CLYMER
FARNER
BARLEY

CLYMER FARNER BARLEY, Inc.
4450 NE 83RD RD, WILDOOD, FL 34785
(352) 748-3126

City of Wildwood, Florida

Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant is seeking a favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for the construction of a nine thousand thirty-six (9,036) square foot public safety building and associated infrastructure improvements, parking, and drive aisles on 0.99 acres, MOL. The subject property is generally located along CR 509 and Warm Springs Ave, approximately 1 mile east of N US 301.

Case: SP 2301-003 VPSD #46

Parcels: G32-008 & G32-027

Owner: Village Center Community Development District

Applicant: Village Center Community Development District

Under Land Development Regulation (LDR) § 1.7(B)(1), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed site plans.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 4.4, the Special Magistrate recommends approval.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate, City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: PLAT 2305-002 VOSO Unit 204 Final Plat

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

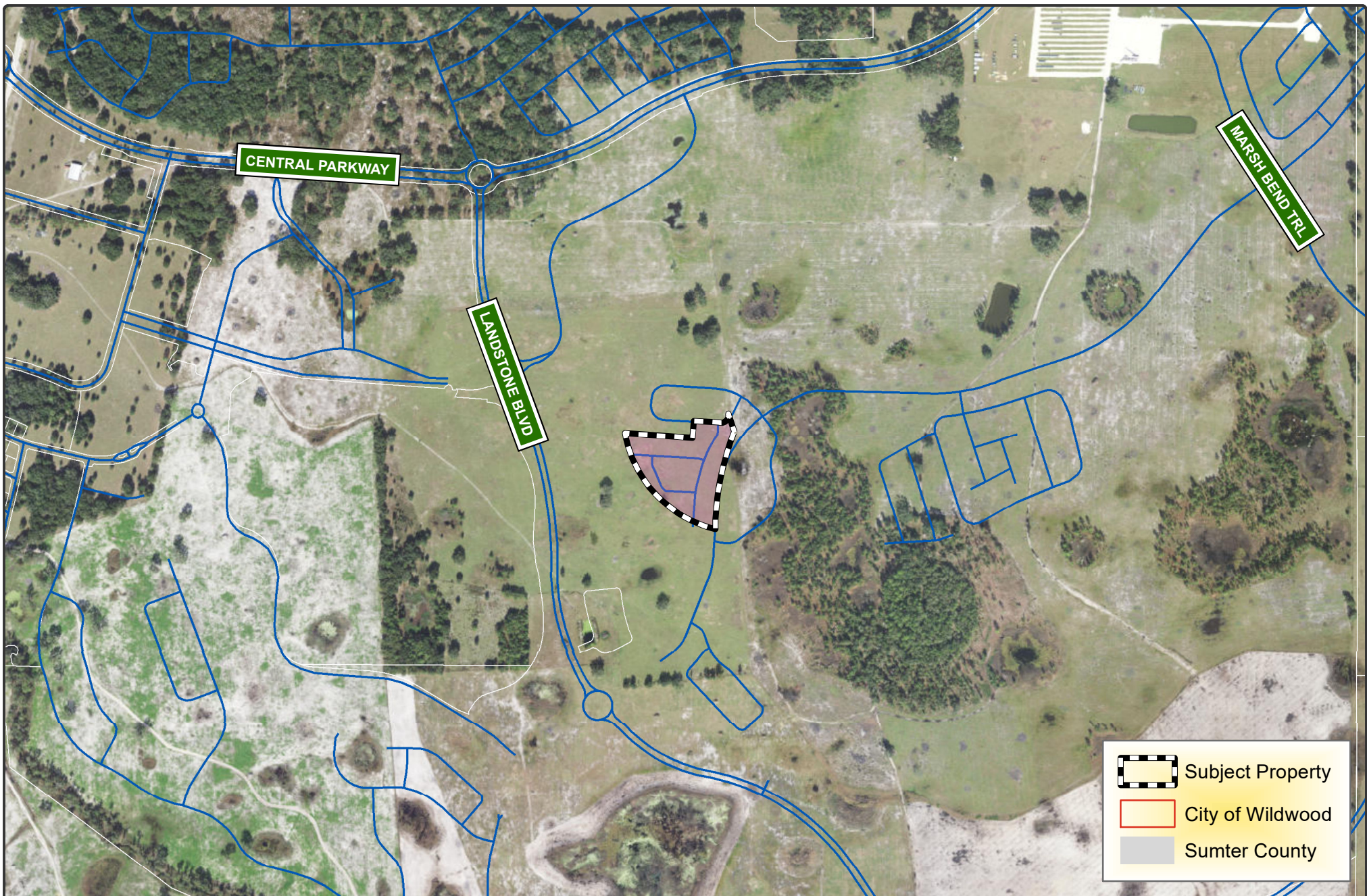
The Villages Development Company, LLC is seeking approval from the City Commission for VOSO Unit 204 Final Plat, a subdivision consisting of 34 single-family dwelling units, on 6.93 acres MOL.

PLAT 2305-002 conforms with F.S 177 and the City of Wildwood's Land Development Regulations section 5.6.

DATED: 06/06/2023



Anarquis Frias
Planner I, Development Services



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 Feet 0 425 850	PLAT 2305-002 VOSO UNIT 204 FINAL PLAT PORTION OF PARCEL K15-006	MAP 1B LOCATION MAP JUNE 2023
--	---	---	--	---

CONVEYANCE, CONDITIONS, RESTRICTIONS AND EASEMENTS OF THIS SUBDIVISION ARE SHOWN ON THE PLAT BOOK AND RECORDS OF SUMTER COUNTY, FLORIDA.

VILLAGES OF SOUTHERN OAKS UNIT NO. 204

SECTION 15, TOWNSHIP 20 SOUTH, RANGE 23 EAST,
CITY OF WILDWOOD, SUMTER COUNTY, FLORIDA.

SHEET 1 OF 2

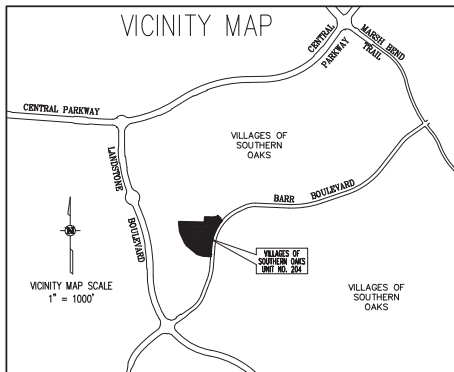
PLAT BOOK
PAGE

LEGAL DESCRIPTION

A PARCEL OF LAND LYING WITHIN THE SOUTHWEST 1/4 OF SECTION 15, TOWNSHIP 20 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, DESCRIBED AS FOLLOWS:

COMMENCE AT THE NORTHWEST CORNER OF THE NORTHWEST 1/4 OF AFORESAID SECTION 15; THENCE ALONG THE NORTH LINE THEREOF RUN S89°44'47"E, 260.69 FEET; THENCE DEPARTING S4D NORTH LINE RUN S00°16'13"W, 386.07 FEET TO THE POINT OF BEGINNING; THENCE S89°53'52"E, 440.45 FEET; THENCE N07°28'25"E, 80.00 FEET; THENCE S89°53'52"E, 143.11 FEET TO THE POINT OF CURVATURE OF A CURVE CONCAVE NORTHERLY AND HAVING A RADIUS OF 117.50 FEET; THENCE EASTERLY ALONG THE ARC OF SAID CURVE THROUGH A CENTRAL ANGLE OF 47°54'47", AN ARC DISTANCE OF 84.50 FEET; THENCE ALONG A RADIAL LINE RUN S37°44'47"E, 86.35 FEET; THENCE S50°08'37"E, 10.00 FEET TO A POINT ON THE ARC OF A NON-TANGENT CURVE CONCAVE EASTERLY, HAVING A RADIUS OF 780.00 FEET AND A CHORD BEARING AND DISTANCE OF S27°33'59"W, 472.55 FEET TO WHICH A RADIAL LINE BEARS N50°08'37"E; THENCE SOUTHERLY ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 30°15'59", AN ARC DISTANCE OF 480.10 FEET TO THE POINT OF TANGENCY; THENCE S04°35'30"W, 172.30 FEET; THENCE N82°24'30"W, 135.00 FEET; THENCE N73°50'30"W, 17.94 FEET; THENCE N05°20'35"W, 272.30 FEET; THENCE N38°04'51"W, 75.49 FEET; THENCE N28°38'45"W, 176.96 FEET; THENCE N15°01'24"W, 50.49 FEET; THENCE N05°30'35"W, 146.17 FEET TO THE POINT OF BEGINNING.

CONTAINING 6.93 ACRES, MORE OR LESS.



34 LOTS - 5 TRACTS

NOTE: THIS PLAT, AS RECORDED IN ITS GRAPHIC FORM, IS THE OFFICIAL DEPICTION OF THE SUBDIVIDED LANDS DESCRIBED HEREIN AND WILL IN NO CIRCUMSTANCES BE SUPERPLANTED IN AUTHORITY BY ANY OTHER GRAPHIC OR DIGITAL FORM OF THE PLAT. THERE MAY BE ADDITIONAL RESTRICTIONS THAT ARE NOT RECORDED ON THIS PLAT THAT MAY BE FOUND IN THE PUBLIC RECORDS OF THIS COUNTY.

VILLAGES OF SOUTHERN OAKS UNIT NO. 204 CONVEYANCE AND GRANT OF EASEMENTS TO VILLAGE COMMUNITY DEVELOPMENT DISTRICT NO. 15

ALL RIGHT, TITLE AND INTEREST OF THE VILLAGES DEVELOPMENT COMPANY, LLC (THE DEVELOPER) IN TRACTS "A", "B", "C", "D", "E", "F", "G", "H", "I", "J", "K", "L", "M", "N", "O", "P", "Q", "R", "S", "T", "U", "V", "W", "X", "Y", "Z" AND THE ROADWAYS SHOWN ON THIS PLAT OF VILLAGES OF SOUTHERN OAKS UNIT NO. 204, IS HEREBY SOLD, CONVEYED AND SET OVER TO VILLAGE COMMUNITY DEVELOPMENT DISTRICT NO. 15 (THE DISTRICT); (1) RESERVING UNTO THE DEVELOPER AND ITS ASSIGNS, AND EACH OF THEIR SUCCESSORS, TENANTS, INVITEES, AND GUESTS PERPETUAL EASEMENTS FOR INGRESS AND EGRESS AND THE CONSTRUCTION, INSTALLATION, MAINTENANCE AND OPERATION OF UNDERGROUND ELECTRIC, TELEPHONE, CABLE, GAS AND OTHER UTILITIES, IRRIGATION FACILITIES, POTABLE WATER, SANITARY SEWER AND STORM WATER FACILITIES, LANDSCAPED AREAS, FENCES, WALLS, ENTRY FACILITIES, INCLUDING ELECTRONIC CARD READING EQUIPMENT, GOLF CART AND PEDESTRIAN PATHS, SIGNAGE, ENJOYMENT IMPROVEMENTS AND GOLF CART AND PEDESTRIAN BRIDGES; AND (2) SUBJECT TO THE RESTRICTION THAT ALL ADDITIONS OF, REMOVAL OF, AND CHANGES TO IMPROVEMENTS LOCATED ON SUCH TRACTS AND ROADWAYS (INCLUDING, WITHOUT LIMITATION, ALL THOSE IMPROVEMENTS DESCRIBED ABOVE), MUST FIRST BE APPROVED IN ADVANCE BY THE DEVELOPER.

THE DEVELOPER ALSO GRANTS TO THE DISTRICT NON-EXCLUSIVE, PERPETUAL EASEMENTS OVER, ACROSS AND UPON ANY SPECIAL EASEMENTS SHOWN HEREON FOR THE PURPOSE OF MAINTAINING DRAINAGE FACILITIES LOCATED THEREON.

THE DISTRICT, BY EXECUTING THE DEDICATION CONTAINED ON THIS PLAT, ACCEPTS THIS CONVEYANCE AND AGREES TO MAINTAIN THE TRACTS LISTED ABOVE, INCLUDING ALL IMPROVEMENTS CONSTRUCTED THEREON AND DRAINAGE FACILITIES LOCATED WITHIN ANY SPECIAL EASEMENTS PERPETUALLY, AND MAINTAIN THE ROADWAYS AND DRAINAGE FEATURES LYING WITHIN SUCH ROADWAYS FOR TWO YEARS AFTER THE CITY ENGINEER HAS CERTIFIED THE CONSTRUCTION HAS BEEN COMPLETED.

WITNESSES AS TO ALL

THE VILLAGES DEVELOPMENT COMPANY, LLC,
A FLORIDA LIMITED LIABILITY COMPANY
BY: VDC MANAGER, LLC,
A FLORIDA LIMITED LIABILITY COMPANY,
ITS MANAGER

SIGNATURE
PRINT NAME
SIGNATURE
PRINT NAME

BY: MARTIN L. DZURO, MANAGER

STATE OF FLORIDA
COUNTY OF SUMTER

THE FOREGOING INSTRUMENT WAS ACKNOWLEDGED BEFORE ME, BY MEANS OF ☐ PHYSICAL PRESENCE OR ☐ ONLINE NOTARIZATION, THIS ____ DAY OF _____, 20____, BY MARTIN L. DZURO, AS MANAGER OF AND ON BEHALF OF VDC MANAGER, LLC, A FLORIDA LIMITED LIABILITY COMPANY, THE MANAGER OF THE VILLAGES DEVELOPMENT COMPANY, LLC, A FLORIDA LIMITED LIABILITY COMPANY, FOR THE PURPOSES EXPRESSED HEREIN, WHO IS PERSONALLY KNOWN TO ME AND WHO DID NOT TAKE AN OATH.

NOTARY PUBLIC - STATE OF FLORIDA
PRINT NAME: _____
COMMISSION NO.: _____
COMMISSION EXPIRES: _____

SEAL

PREPARED BY:



CFB
SURVEYING
4400 NE 83RD ROAD - WILDWOOD, FL 34785
(904) 463-1018 (LOCAL)

**CLYMER
FARMER
BARLEY**

REVIEWING SURVEYOR'S CERTIFICATE

PURSUANT TO SECTION 177.081, FLORIDA STATUTES, I HEREBY CERTIFY THAT I HAVE PERFORMED A REVIEW OF THIS PLAT FOR CONFORMITY TO CHAPTER 177, FLORIDA STATUTES AND THAT SAID PLAT COMPLIES WITH THE TECHNICAL REQUIREMENTS OF THAT CHAPTER; PROVIDED, HOWEVER, THAT MY REVIEW AND CERTIFICATION DOES NOT INCLUDE FIELD VERIFICATION OF ANY POINTS OR MEASUREMENTS SHOWN ON THIS PLAT.

SIGNATURE DATE
RONALD W. HERR, P.L.S. 4907
WIDE SURVEYING, INC. REGISTRATION NO.

SEAL

NOTES:

- 1.) BEARINGS ARE BASED ON THE NORTH LINE OF THE NORTHWEST 1/4 OF SECTION 15, TOWNSHIP 20 SOUTH, RANGE 23 EAST AS BEING S89°43'47"E.
- 2.) ALL PLATTED UTILITY EASEMENTS SHALL PROVIDE THAT SUCH EASEMENTS SHALL ALSO BE EASEMENTS FOR THE CONSTRUCTION, INSTALLATION, MAINTENANCE, AND OPERATION OF CABLE TELEVISION SERVICES; PROVIDED, HOWEVER, NO SUCH CONSTRUCTION, INSTALLATION, MAINTENANCE, AND OPERATION OF CABLE TELEVISION SERVICES SHALL INTERFERE WITH THE FACILITIES AND SERVICES OF AN ELECTRIC, TELEPHONE, GAS, OR OTHER PUBLIC UTILITY. IN THE EVENT A CABLE TELEVISION COMPANY DAMAGES THE FACILITIES OF A PUBLIC UTILITY, IT SHALL BE SOLELY RESPONSIBLE FOR THE DAMAGES. THIS SECTION SHALL NOT APPLY TO THOSE PRIVATE EASEMENTS GRANTED TO OR OBTAINED BY A PARTICULAR ELECTRIC, TELEPHONE, GAS, OR OTHER PUBLIC UTILITY. SUCH CONSTRUCTION, INSTALLATION, MAINTENANCE, AND OPERATION SHALL COMPLY WITH THE NATIONAL ELECTRICAL SAFETY CODE AS ADOPTED BY THE FLORIDA PUBLIC SERVICE COMMISSION.
- 3.) ALL DISTANCES SHOWN ARE IN FEET.
- 4.) WITH REFERENCE TO CURVILINEAR LOTS, RADIAL LINES HAVE BEEN DESIGNATED BY (R) ALL OTHER LINES ARE NON-RADIAL.
- 5.) LOT CORNERS WILL BE SET PRIOR TO THE TRANSFER OF ANY LOT OR PRIOR TO THE EXPIRATION OF THE BOND OR OTHER SURETY.
- 6.) PERMANENT CONTROL POINTS (P.C.P.'S) WILL BE SET WITHIN ONE YEAR OF THE DATE THIS PLAT WAS RECORDED OR PRIOR TO THE EXPIRATION OF THE BOND OR SURETY.
- 7.) ALL PERMANENT REFERENCE MONUMENTS (P.R.M.'S) HAVE BEEN SET IN ACCORDANCE WITH THE REQUIREMENTS OF CHAPTER 177, FLORIDA STATUTES.
- 8.) TRACTS "A", "D" AND "E" ARE FOR ANY PURPOSE PERMITTED BY APPLICABLE LAW AND APPROVED IN WRITING BY DEVELOPER.
- 9.) TRACTS "D" AND "E" ARE FOR ANY PURPOSE PERMITTED BY APPLICABLE LAW AND APPROVED IN WRITING BY DEVELOPER. NO INGRESS OR EGRESS IS PERMITTED WITHOUT THE DEVELOPER'S CONSENT.
- 10.) THE DISTRICT FINDS IT IN THE PUBLIC INTEREST, AND HEREBY AGREES TO PROVIDE THE FOLLOWING SERVICES: (A) MAINTENANCE AND REPAIR OF AREAS OWNED BY THE DISTRICT OR DEDICATED TO THE USE AND ENJOYMENT OF THE RESIDENTS OF THE DISTRICT, THE SUBDIVISION, OR THE PUBLIC; (B) PAY FOR THE COST OF WATER AND SEWER PROVIDED BY GREEN PLACE UTILITY COMPANY, LLC, OR ITS ASSIGNS, TOGETHER WITH THE COST OF GARAGE, ELECTRICAL, LIGHTING, TELEPHONE, GAS AND OTHER NECESSARY UTILITY SERVICE FOR AREAS OWNED BY THE DISTRICT OR DEDICATED TO THE USE AND ENJOYMENT OF THE RESIDENTS OF THE DISTRICT, SUBDIVISION, OR THE PUBLIC; (C) MAINTENANCE AND REPAIR OF THE STORM WATER RUNOFF DRAINAGE SYSTEM INCLUDING DRAINAGE EASEMENTS AND SEWER PIPES NOT MAINTAINED BY GREEN PLACE WATER CONSERVATION AUTHORITY, LLC, OR ITS ASSIGNS, OR THE CITY OF WILDWOOD; AND (D) MAINTENANCE AND REPAIR OF THE LANDSCAPING AND IRRIGATION ON ISLANDS AND CUL-DE-SACS LOCATED WITHIN THE ROADWAYS, IF ANY; (E) MAINTENANCE AND REPAIR TO THE TOP AND EXTERIOR OF THE WALLS AND/OR FENCES LOCATED ON OR ADJACENT TO TRACTS A AND B OF THE SUBDIVISION; (F) MAINTENANCE AND REPAIR TO THE EXTERIOR OF THE WALLS, BUT NOT ANY RAILINGS, LOCATED ON OR ADJACENT TO TRACT C OF THE SUBDIVISION; AND (G) MAINTENANCE AND REPAIR, INCLUDING STRUCTURAL REPAIR, TO THE WALLS AND/OR FENCES LOCATED ON OR ADJACENT TO TRACTS D AND E OF THE SUBDIVISION.
- 11.) THE TITLE OPINION FOR THIS PLAT HAS BEEN SUBMITTED BY SEPARATE DOCUMENT.

CERTIFICATE OF APPROVAL BY CITY OFFICIALS

THIS CERTIFIES THAT THIS PLAT HAS BEEN REVIEWED FOR CONFORMITY TO F.S. CHAPTER 177, AS CERTIFIED BY THE REVIEWING SURVEYOR SHOWN BELOW.

MELANIE D. PEAVY
DEVELOPMENT SERVICES DIRECTOR

THIS CERTIFIES THAT THIS PLAT WAS PRESENTED TO THE COMMISSION OF THE CITY OF WILDWOOD, SUMTER COUNTY, FLORIDA, AND WAS APPROVED BY THE COMMISSION FOR RECORD ON THIS ____ DAY OF ____ 20____.

SUSAN PATTERSON ED WOLF
CITY CLERK MAYOR

THIS CERTIFIES THAT THIS PLAT WAS PRESENTED TO THE ATTORNEY FOR THE CITY OF WILDWOOD, SUMTER COUNTY, FLORIDA, AND APPROVED BY HIM OR HER AS TO FORM AND LEGALITY ON THIS ____ DAY OF ____ 20____.

PRINT NAME SIGNATURE
CITY OF WILDWOOD, ATTORNEY CITY OF WILDWOOD, ATTORNEY

DEVELOPMENT SERVICES DIRECTOR PUBLIC WORKS DIRECTOR
MELANIE D. PEAVY JEREMY HOOKENBURY

PRINT NAME SIGNATURE
CITY OF WILDWOOD, ENGINEER CITY OF WILDWOOD, ENGINEER

DEDICATION

KNOW ALL MEN BY THESE PRESENTS, THAT THE UNDERSIGNED, THE VILLAGES DEVELOPMENT COMPANY, LLC (THE DEVELOPER) HAS CAUSED TO BE MADE THIS PLAT, VILLAGES OF SOUTHERN OAKS UNIT NO. 204, A SUBDIVISION OF LAND HEREIN DESCRIBED AND JOINS WITH VILLAGE COMMUNITY DEVELOPMENT DISTRICT NO. 15 (THE DISTRICT) TO HEREBY DEDICATE THE ROADWAYS SHOWN HEREON TO THE CITY OF WILDWOOD AND THE PERPETUAL USE OF THE PUBLIC, AND DEDICATES TRACTS "A", "B", "C", "D" AND "E" TO VILLAGE COMMUNITY DEVELOPMENT DISTRICT NO. 15.

WITNESSES: THE VILLAGES DEVELOPMENT COMPANY, LLC,
A FLORIDA LIMITED LIABILITY COMPANY
BY: VDC MANAGER, LLC,
A FLORIDA LIMITED LIABILITY COMPANY,
ITS MANAGER

(1) SIGNATURE BY: _____
PRINT NAME NAME: MARTIN L. DZURO
TITLE: MANAGER

(2) SIGNATURE
PRINT NAME

WITNESSES: VILLAGE COMMUNITY DEVELOPMENT
DISTRICT NO. 15
BY: SPENCER R. NOVAK, CHAIR

(1) SIGNATURE
PRINT NAME
(2) SIGNATURE
PRINT NAME

STATE OF FLORIDA
COUNTY OF SUMTER

THE FOREGOING INSTRUMENT WAS ACKNOWLEDGED BEFORE ME, BY MEANS OF ☐ PHYSICAL PRESENCE OR ☐ ONLINE NOTARIZATION, THIS ____ DAY OF _____, 20____, BY MARTIN L. DZURO, AS MANAGER OF AND ON BEHALF OF VDC MANAGER, LLC, A FLORIDA LIMITED LIABILITY COMPANY, THE MANAGER OF THE VILLAGES DEVELOPMENT COMPANY, LLC, A FLORIDA LIMITED LIABILITY COMPANY, FOR THE PURPOSES EXPRESSED HEREIN, WHO IS PERSONALLY KNOWN TO ME AND WHO DID NOT TAKE AN OATH.

NOTARY PUBLIC - STATE OF FLORIDA

PRINT NAME: _____
COMMISSION NO.: _____
COMMISSION EXPIRES: _____

STATE OF FLORIDA
COUNTY OF SUMTER

THE FOREGOING INSTRUMENT WAS ACKNOWLEDGED BEFORE ME, BY MEANS OF ☐ PHYSICAL PRESENCE OR ☐ ONLINE NOTARIZATION, THIS ____ DAY OF _____, 20____, BY SPENCER R. NOVAK, CHAIR OF VILLAGE COMMUNITY DEVELOPMENT DISTRICT NO. 15, ON BEHALF OF THE DISTRICT, WHO IS PERSONALLY KNOWN TO ME AND WHO DID NOT TAKE AN OATH.

NOTARY PUBLIC - STATE OF FLORIDA

PRINT NAME: _____
COMMISSION NO.: _____
COMMISSION EXPIRES: _____

CERTIFICATE OF SURVEYOR

I HEREBY CERTIFY THAT THIS PLAT OF VILLAGES OF SOUTHERN OAKS UNIT NO. 204, WAS PREPARED UNDER MY DIRECTION AND SUPERVISION; AND THAT THE PERMANENT REFERENCE MONUMENTS AS SHOWN THEREON WERE PLACED ON THE ____ DAY OF ____ 20____. I FURTHER CERTIFY THAT THIS PLAT COMPLIES WITH THE REQUIREMENTS OF CHAPTER 177, FLORIDA STATUTES.

CLYMER FARMER BARLEY SURVEYING, LLC
4400 NE 83RD ROAD
WILDWOOD, FLORIDA 34785
LICENSED BUSINESS NO. 8498

KAYE M. JAMESON DATE
REGISTRATION NO. 5912

CERTIFICATE OF CLERK

I HEREBY CERTIFY THAT I HAVE EXAMINED THIS PLAT AND FIND THAT IT COMPLIES IN FORM WITH ALL THE REQUIREMENTS OF CHAPTER 177, FLORIDA STATUTES AND WAS FILED FOR RECORD ON ____ DAY OF ____ 20____ AT ____ FILE NUMBER ____ PLAT BOOK ____ PAGE ____.

CLERK OF THE COURT IN AND
FOR SUMTER COUNTY, FLORIDA

PRINT NAME SIGNATURE
DEPUTY CLERK DEPUTY CLERK

VILLAGES OF SOUTHERN OAKS

UNIT NO. 204

SHEET 2 OF 2

PLAT BOOK
PAGE

SECTION 15, TOWNSHIP 20 SOUTH, RANGE 23 EAST,
CITY OF WILDWOOD, SUMTER COUNTY, FLORIDA.

CURVE	LENGTH	RADIUS	DELTA	CHORD BNG.	CHORD
C1	47.53	89.07	30°35'46"	N16°46'21"E	46.86
C2	430.44	897.50	27°28'44"	S18°19'53"W	436.33
C3	153.78	897.50	9°49'02"	S27°09'44"W	153.59
C4	221.86	897.50	14°09'48"	S15°01'19"W	221.29
C5	54.80	897.50	3°29'55"	S06°20'22"W	54.79
C6	47.38	42.50	63°52'44"	S56°35'10"E	44.97
C7	19.38	42.50	26°07'16"	S11°32'10"E	19.21
C8	29.54	20.00	84°36'11"	N46°12'26"W	26.93
C9	1.87	20.00	5°21'49"	N01°12'26"W	1.87
C10	25.89	20.00	74°10'24"	S38°33'40"W	24.12
C11	32.46	117.50	15°49'36"	N83°33'40"E	32.35
C12	52.06	117.50	25°37'07"	N62°51'19"E	51.63
C13	65.20	127.50	29°17'54"	N45°44'43"E	64.49
C14	38.16	71.50	30°35'46"	N16°46'21"E	37.73
C15	25.15	915.00	1°34'29"	S31°17'00"W	25.15
C16	106.17	915.00	6°38'53"	S27°10'19"W	106.11
C17	23.61	20.00	67°37'35"	N57°39'41"E	22.26
C18	23.56	15.00	90°00'00"	N43°31'32"W	21.21
C19	27.23	60.00	26°00'24"	N13°31'43"E	27.00
C20	0.12	60.00	0°06'52"	S24°35'21"E	0.12
C21	61.76	60.00	58°56'43"	S54°08'09"E	59.07
C22	5.13	60.00	4°54'01"	S86°04'31"E	5.13
C23	24.71	15.00	94°22'20"	N41°20'21"W	22.01
C24	46.87	880.00	33°37'06"	S06°07'03"W	46.86
C25	39.01	790.00	2°49'44"	S06°00'22"W	39.00
C26	59.76	790.00	4°20'04"	S09°35'16"W	59.75
C27	66.57	880.00	4°20'04"	S09°48'38"W	66.56
C28	66.55	880.00	4°19'59"	S14°08'40"W	66.54
C29	59.75	790.00	4°19'59"	S13°55'18"W	59.73
C30	59.74	790.00	4°19'59"	S18°15'17"W	59.73
C31	66.55	880.00	4°19'59"	S18°28'39"W	66.54
C32	66.53	880.00	4°19'55"	S22°48'36"W	66.52
C33	59.73	790.00	4°19'55"	S22°35'19"W	59.72
C34	59.80	790.00	4°20'13"	S26°55'18"W	59.78
C35	66.61	880.00	4°20'12"	S27°06'40"W	66.59
C36	42.36	880.00	2°45'28"	S30°41'39"W	42.35
C37	12.43	106.50	6°41'07"	N28°43'30"E	12.42
C38	108.95	790.00	7°54'06"	S33°02'28"W	108.86
C39	39.51	790.00	2°51'57"	S38°25'30"W	39.51
C40	44.44	106.50	2°54'36"	N13°25'46"E	44.12
C41	486.25	790.00	35°15'58"	S22°13'29"W	478.61

POINT OF COMMENCEMENT
NORTHWEST CORNER OF
THE NORTHWEST 1/4 OF
SECTION 15-20-23
FOUND NAIL AND DISK
LB #4709

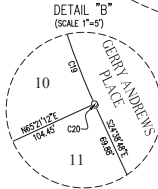
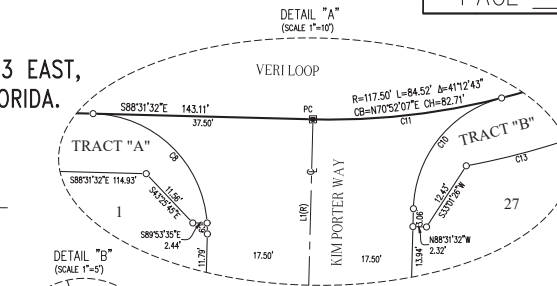
NORTH LINE OF THE NORTHWEST 1/4
OF SECTION 15-20-23
(BEARING BASIS)

CURVE	LENGTH	RADIUS	DELTA	CHORD BNG.	CHORD
C42	70.22	915.00	4°23'49"	S12°36'08"W	70.20
C43	35.37	25.00	81°04'15"	N50°56'21"E	32.50
C44	27.87	25.00	63°52'44"	S56°35'10"E	26.45
C45	11.40	25.00	28°07'16"	S11°35'10"E	11.30
C46	39.27	25.00	90°00'00"	S46°28'28"W	35.36
C47	37.52	20.00	107°29'00"	N34°47'02"W	32.25
C48	66.39	915.00	4°09'26"	S16°52'45"W	66.38
C49	20.04	915.00	1°15'18"	S05°13'09"W	20.04

DETAIL "C"
(SCALE 1"=5')

DETAIL "D"
(SCALE 1"=10')

DETAIL "E"
(SCALE 1"=10')



LINE	LENGTH	BEARING
L1	31.79	N12°28'28"E

TRACT	SG FT	ACREAGE
A	1,224	0.028
B	709	0.016
C	6,555	0.150
D	71	0.002
E	70	0.002

LEGEND

- INDICATES 4" x 4" x 24" CONCRETE PERMANENT REFERENCE MONUMENT (P.R.M.) FOUND (LB #4709), UNLESS OTHERWISE NOTED.
- INDICATES 4" x 4" x 24" CONCRETE PERMANENT REFERENCE MONUMENT (P.R.M.) OR 5/8" IRON PIN AND CAP SET LB #4880 & LB #4709
- INDICATES P.V. NAIL AND DISK PERMANENT CONTROL POINT (P.C.P.) LB #4880 & LB #4709 TO BE SET WITHIN ONE YEAR OF THE DATE THIS PLAT IS RECORDED.
- INDICATES 5/8" IRON PIN AND CAP TO BE SET IN ACCORDANCE WITH SECTION 177.09(1) FLORIDA STATUTES.
- (SEE NOTE #3)
- INDICATES CURVE NUMBER IN CURVE TABLE
- INDICATES LINE NUMBER IN LINE TABLE
- INDICATES CENTERLINE
- INDICATES DELTA (CENTRAL ANGLE OF CURVE)
- INDICATES CHORD BEARING
- INDICATES CHORD DISTANCE
- INDICATES ARC LENGTH
- INDICATES UNLICENSED BUSINESS
- INDICATES NUMBER
- INDICATES OFFICIAL RECORDS BOOK
- INDICATES POINT OF CURVATURE
- INDICATES POINT ON CURVE
- INDICATES POINT OF COMPOUND CURVATURE
- INDICATES POINT OF REVERSE CURVATURE
- INDICATES POINT OF TANGENCY
- INDICATES RADIAL LINE
- INDICATES DRAINAGE RETENTION AREA FOR STORMWATER MANAGEMENT INCLUDING CONVEYING PIPES
- INDICATES GATE FACILITIES EASEMENT (RESERVED BY THE DEVELOPER AND ITS ASSIGNS)
- INDICATES SPECIAL EASEMENT RESERVED BY DEVELOPER AND ITS ASSIGNS, FOR LANDSCAPING, INSTALLATION, MAINTENANCE AND OPERATION OF WATER, SANITARY SEWER, ELECTRIC, TELEPHONE, GAS OR OTHER UTILITIES AND/OR DRAINAGE FACILITIES AND/OR WALL FENCING AND/OR SOIL CARBON PAVING. DEVELOPER CONVEYANCES FUTURE HVAC AND SIMILAR EQUIPMENT WITHIN THE EASEMENT AREA. UTILITY PROVIDERS UTILIZING SUCH EASEMENT AREA CONVEYANCE, AS A CONDITION OF THE RIGHT TO USE SUCH EASEMENT, NOT TO INTERFERE OR DISRUPT SUCH EQUIPMENT INSTALLED WITHIN THE EASEMENT AREA.
- INDICATES PLAT BOOK
- INDICATES PAGE
- INDICATES PAGES
- SG FT INDICATES SQUARE FEET
- LB/W INDICATES POUNDS-PER-SQUARE FOOT

POINT OF BEGINNING

UNPLATTED VILLAGES OF SOUTHERN OAKS UNIT NO. 205 (PROPOSED)

TRACT "D" SEE DETAIL "D"

TRACT "E" SEE DETAIL "E"

TRACT "F" SEE DETAIL "F"

TRACT "G" SEE DETAIL "G"

TRACT "H" SEE DETAIL "H"

TRACT "I" SEE DETAIL "I"

TRACT "J" SEE DETAIL "J"

TRACT "K" SEE DETAIL "K"

TRACT "L" SEE DETAIL "L"

TRACT "M" SEE DETAIL "M"

TRACT "N" SEE DETAIL "N"

TRACT "O" SEE DETAIL "O"

TRACT "P" SEE DETAIL "P"

TRACT "Q" SEE DETAIL "Q"

TRACT "R" SEE DETAIL "R"

TRACT "S" SEE DETAIL "S"

TRACT "T" SEE DETAIL "T"

TRACT "U" SEE DETAIL "U"

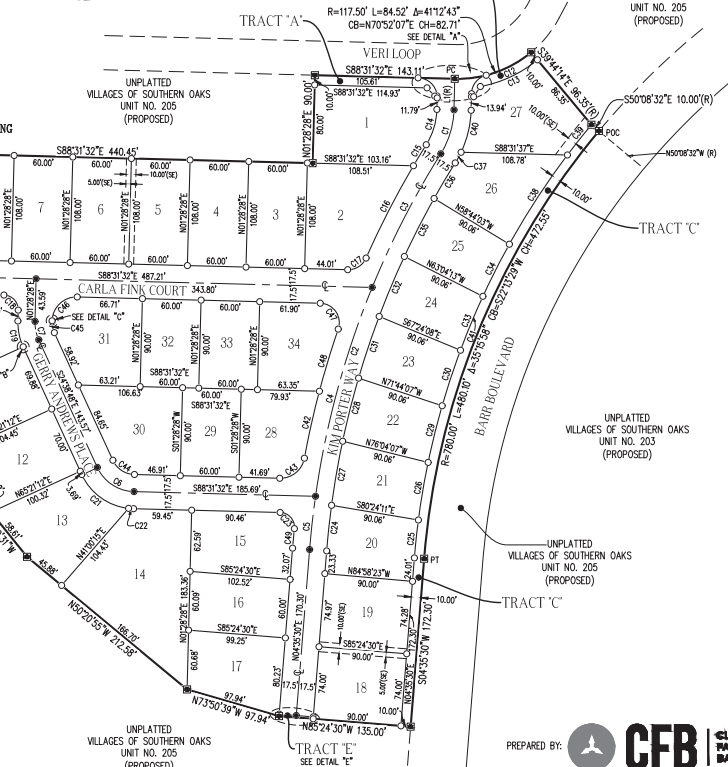
TRACT "V" SEE DETAIL "V"

TRACT "W" SEE DETAIL "W"

TRACT "X" SEE DETAIL "X"

TRACT "Y" SEE DETAIL "Y"

TRACT "Z" SEE DETAIL "Z"



PREPARED BY: **CFB** SURVEYING
4400 NE 8TH ROAD - WILDFORD, FL 34945
(888) 746-7634

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: CP 2212-001 Thomas Group Planned Development

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance Number O2022-99.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case #	CP 2212-001 Thomas Group Planned Development
Ordinance #	O2022-99
Applicant	Ryan Thompson, CHW
Owner	Thomas Group Investments #1, LLC
Property Location	Located 0.06 miles west of the intersection of Marsh Bend Trail and Myrtle Dr
Parcel Number(s)	G33-154
Date	6/19/2023

The applicant Ryan Thompson, representing Thomas Group Investments #1 LLC seeks approval from the City Commission for a Small-Scale Comprehensive Plan Amendment to change the Future Land Use Map designation from Agricultural (Sumter County) to Commercial (City) for the parcel listed above on 4.86 acres MOL. This request is accompanied by rezoning request RZ 2212-001 and Planned Development agreement PD 2212-001.

Staff believes the proposed amendment should be granted based on the following criteria found in Land Development Regulation (LDR) §1.7(D).

(1) Justification of the proposed amendment has been adequately presented;

The applicant intends to develop a multi-story storage facility on the subject property consisting of 4.86 acres MOL. Per the accompanying planned development agreement, the only allowable permitted use of the property is as a multi-story indoor storage facility, with twenty percent (20%) open space. Justification has been presented to the city to support the proposed development, with surrounding parcels on the FLUM depicting a mix of Medium-Density Residential and Commercial.

(2) The proposed amendment is not inconsistent with the goals, objectives and policies of the comprehensive plan;

The proposed amendment is not inconsistent with the policies of the Comprehensive Plan. Under the 2050 Comprehensive Plan Objective 1.2 “The City shall strive to create a sustainable community, by discouraging the proliferation of urban sprawl, promoting the efficient utilization of public infrastructure, and implementing a compact land use pattern”. Under these expectations, Policy 1.2.8(a) & (l) would apply to the proposed development. This follows the existing policies by contributing to a mix of land uses that are compatible with surrounding parcels and maintain compatibility with neighboring areas through the utilization of effective design standards.

Separately, surrounding parcels are currently zoned for a mix of Medium-Density Residential (MDR) and commercial, with FLU split between commercial, Medium-Density residential, and Age-Restricted Development (ARD). This mix of commercial and residential is in line with Policy 1.2.8(a) which requests a diversity of land uses. Additionally, the proposed development is commercial and thus would abide by Objective 1.4, which promotes economic development within the city, under which Policy 1.4.5 would best cover the proposed project; namely, that the city is to encourage and support the revitalization of vacant land and underutilized retail spaces. The proposed development is compact in its design and seeks to develop vacant land while providing residents with commercial storage access in their vicinity.

(3) The proposed amendment should not be considered urban sprawl or exemplify an energy inefficient land use pattern;

The amendment is not considered urban sprawl and does not exemplify an energy-inefficient land use pattern. The subject property is located along Marsh Bend Trail and Myrtle Dr, with a single access point being along Myrtle Dr which connects to Marsh Bend Trail. Marsh Bend Trail is a Major Rural Collector Road operating at LOS D with an existing mix of Medium-Density Residential (MDR), Age-Restricted Developments (ARD), and Commercial (COM) designations within the immediate vicinity of the proposed development. The current land use in the surrounding area of the proposed development is primarily single-family homes. Additionally, the proposed development could be considered as directly combating urban sprawl through the use of elements of compact design and efficient land use patterns.

(4) The proposed amendment will not have an adverse effect on environmentally sensitive systems;

The proposed amendment will not have an adverse effect on environmentally sensitive systems. Environmental and ecological assessments were conducted by Ecological Consulting Solutions, Inc in December 2022. No wetlands and/or surface waters were present within the project boundary. The site’s survey revealed no species listed as threatened or endangered at the location.

(5) The proposed amendment will not adversely affect transportation, potable water, sewer, schools or other public facilities without providing remedies to correct the system or facility.

Transportation: Access to the property is proposed from Myrtle Dr, which connects to the southern portion of Marsh Bend Trail. The future land use change to Commercial with the proposed development is estimated to add 160 daily trips, with 10 A.M. & 17 P.M. peak hour trips to Marsh Bend Trail. A full traffic impact analysis has been conducted for maximum density and was accepted by Sumter County. Marsh Bend Trail is a four (4) lane Major Rural

Collector Road, which operates at LOS D and is maintained by Sumter County. The roadway segment analyzed within the Traffic Impact Analysis (TIA) for this project was along Marsh Bend Trail from CR 500 to CR 468. The findings in the accepted TIA were that the LOS analysis of the afore-mentioned segment indicates that the project does not cause deficiencies to Marsh Bend Trail, therefore no transportation improvements are recommended. Additionally, the findings within the TIA were that the capacity for Marsh Bend Trail may not be exceeded in 2025 or beyond.

Potable Water & Sewer: There is an existing 12" water main along Marsh Bend Trail to the east of the parcel, as well as a 16" force main. The subject properties are in an existing demand service area according to the 2019 Utility Master Plan. City water and sewer are available to the subject property. The applicant/owner will need to work with City utilities at the site plan stage to connect to City water and sewer.

Schools: The commercial development is proposed to add no students to the Wildwood School system.

A handwritten signature in black ink that reads "Shaun Raja". The signature is written in a cursive, flowing style.

Shaun Raja,
Planner I, Development Services

ORDINANCE NO. O2022-99

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROPOSING A SMALL SCALE FUTURE LAND USE MAP AMENDMENT TO THE ADOPTED COMPREHENSIVE PLAN AND FUTURE LAND USE MAP IN ACCORDANCE WITH THE COMMUNITY PLANNING ACT OF 2011, AS AMENDED; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City of Wildwood, Florida, is proposing to amend the local Comprehensive Plan and Future Land Use Map of said City, to include a land use amendment described as follows, to-wit:

Parcel(s) G33-154
Thomas Group Investments #1 LLC (Owner)
4.86 Acres +/-

LEGAL DESCRIPTION:

THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, AND THE EAST 35.57 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, LESS THE NORTH 208.71 FEET THEREOF, LESS THE NORTH 30 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST OF SAID SECTION 33; AND LESS ROAD RIGHT OF WAY,

TOGETHER WITH THAT CERTAIN 1986 FLEETWOOD SINGLE WIDE MOBILE HOME, SERIAL NO. 31700999.

LESS AND EXCEPT:

COMMENCE AT THE SOUTH 1/4 CORNER OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, THENCE RUN S 89°48'04" E ALONG THE SOUTH LINE OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, A DISTANCE OF 1,290.43 FEET; THENCE N 00°30'15" E, A DISTANCE OF 631.15 FEET FROM A POINT OF BEGINNING; THENCE CONTINUE N 00°30'15" E, A DISTANCE OF 487.10 FEET TO A POINT ON A LINE 206.71 FEET (*SIC) SOUTH OF AND PARALLEL TO THE NORTH LINE OF SAID SECTION 33; THENCE S 89°44'49" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 35.57 FEET; THENCE N 00°30'15" E, A DISTANCE OF 178.71 FEET TO A POINT ON A LINE, 30 FEET SOUTH AND PARALLEL TO SAID NORTH LINE OF SECTION 33; THENCE S 89°44'49" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 1,274.89 FEET TO THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD 501; THENCE S 00°27'25" W, ALONG SAID RIGHT-OF-WAY LINE, A DISTANCE OF 204.43 FEET TO A POINT OF CURVATURE ON A CURVE CONCAVE NORTHEASTERLY, HAVING A RADIUS OF 3,050.00 FEET, A CHORD BEARING OF S 03°42'26" E, A CHORD DISTANCE OF 442.94 FEET; THENCE RUN SOUTHEASTERLY ALONG THE ARC OF SAID

CURVE, AND SAID WEST RIGHT-OF-WAY LINE, THROUGH A CENTRAL ANGLE OF 8°19'42", A DISTANCE OF 443.33 FEET; THENCE

S 07°52'16" E, ALONG SAID WEST RIGHT-OF-WAY LINE, A DISTANCE OF 18.91 FEET; THENCE N 89°46'46" W, A DISTANCE OF 1,345.92 FEET TO THE POINT OF BEGINNING.

LESS AND EXCEPT:

A PORTION OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 2675, PAGE 100 OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, SAID LANDS LYING IN SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT THE SOUTHEAST CORNER OF SAID SECTION 33; THENCE ALONG THE SOUTH LINE OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, THE FOLLOWING THREE (3) COURSES AND DISTANCES: 1) THENCE RUN NORTH 89°44'50" WEST, A DISTANCE OF 14.42 FEET TO A POINT ON THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD NO. 501 (A VARIABLE WIDTH RIGHT-OF-WAY PER BOARD OF COUNTY COMMISSIONERS RIGHT-OF-WAY MAP, DATED JANUARY 12, 1994); 2) THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 370.01 FEET TO THE POINT OF BEGINNING; 3) THENCE CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 977.04 FEET TO THE SOUTHEAST CORNER OF VILLAGES OF SOUTHERN OAKS KELLER VILLAS, AS RECORDED IN PLAT BOOK 17, PAGES 3 THROUGH 3A, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SOUTH LINE, RUN NORTH 00°32'32" EAST, ALONG THE EAST LINE OF SAID PLATTED LANDS, A DISTANCE OF 631.00 FEET TO THE SOUTHWEST CORNER OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 3270, PAGE 322, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID EAST LINE, RUN SOUTH 89°44'31" EAST, ALONG THE SOUTH LINE OF SAID LANDS, A DISTANCE OF 1346.20 FEET TO A POINT ON THE AFORESAID WEST RIGHT-OF-WAY OF COUNTY ROAD NO. 501; THENCE DEPARTING SAID SOUTH LINE, RUN ALONG SAID WEST RIGHT-OF-WAY THE FOLLOWING TWO (2) COURSE AND DISTANCES: 1) THENCE RUN SOUTH 07°47'53" EAST, A DISTANCE OF 8.28 FEET; 2) THENCE RUN SOUTH 00°34'30" WEST, A DISTANCE OF 51.81 FEET; THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, RUN NORTH 89°44'31" WEST, A DISTANCE OF 370.01 FEET; THENCE RUN SOUTH 00°34'30" WEST, A DISTANCE OF 570.91 FEET TO THE POINT OF BEGINNING.

*SIC = SCRIVENER ERROR: LEGAL DESCRIPTION CALLS FOR A POINT 206.71 FEET, BUT IT SHOULD BE 208.71 FEET.

(SEE SURVEYOR'S NOTE #9)

This property is to be reclassified from Agriculture (Sumter County) to Commercial (City) and contains 4.86 acres, more or less:

AND WHEREAS, the City is proposing to amend the Future Land Use Map to include the future land use of property that shall pertain and be applicable to said amendment.

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

SECTION 1. The adopted local Comprehensive Plan and Future Land Use Map for the City of Wildwood, Florida, are hereby amended to include the above-referenced property and proposed land use amendment as indicated above. The amendment to the

Future Land Use Map of the local comprehensive plan is attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 2. All ordinances or parts of ordinances in conflict herewith, be, and the same are hereby repealed.

SECTION 3. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 4. This Ordinance shall take effect 31 days after its final reading by the City Commission of the City of Wildwood.

DONE AND ORDAINED this _____ day of _____, 2023, by the City Commission of the City of Wildwood, Florida.

CITY COMMISSION

CITY OF WILDWOOD, FLORIDA

Ed Wolf, Mayor

ATTEST: _____
Susan Patterson, City Clerk

First Reading: _____

Second Reading: _____

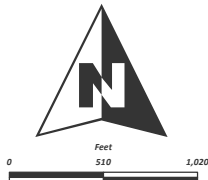
Approved as to form:

City Attorney



**CITY OF
WILDWOOD**

100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



CP/RZ 2212-001

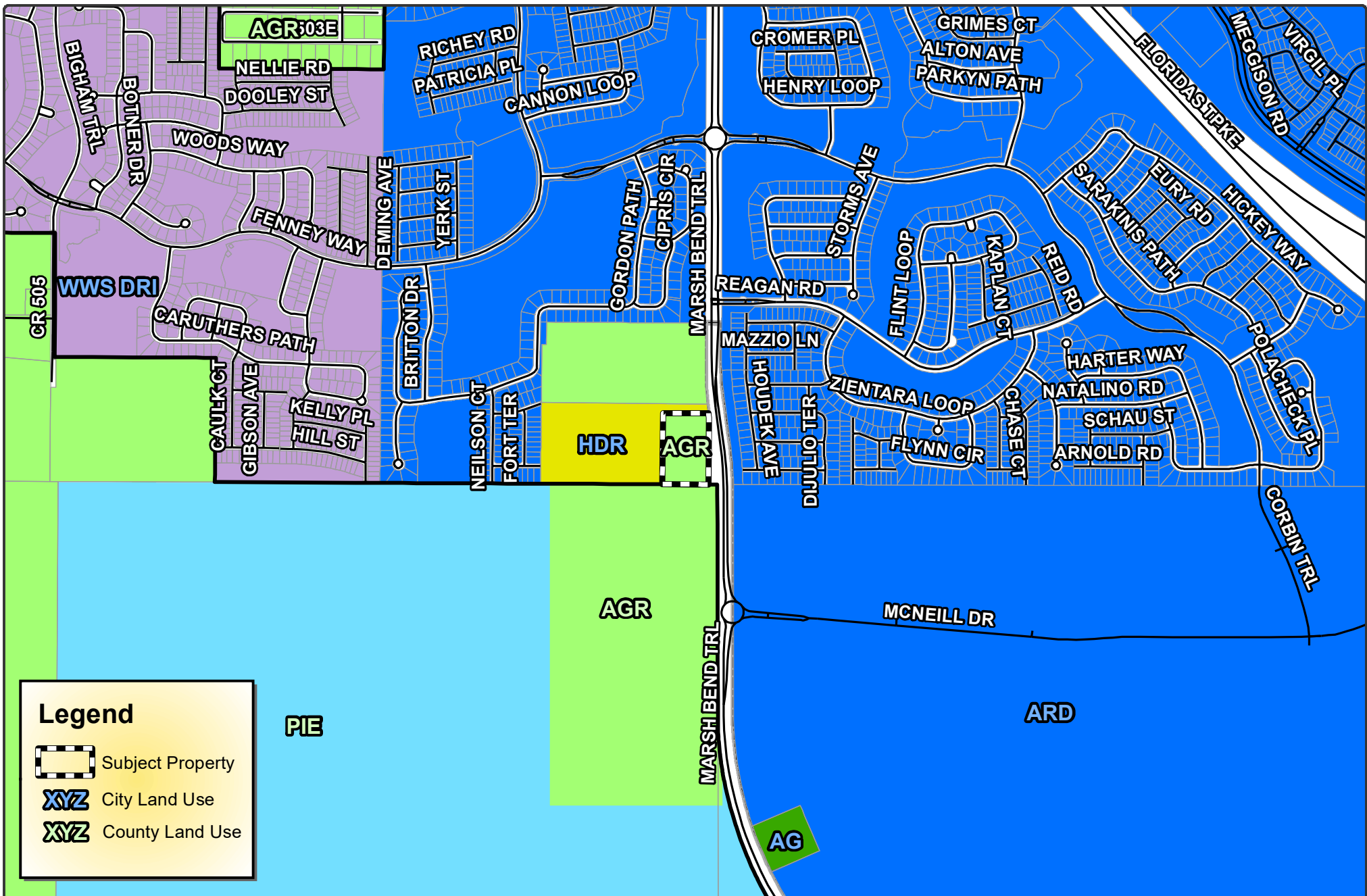
THOMAS GROUP PLANNED DEVELOPMENT

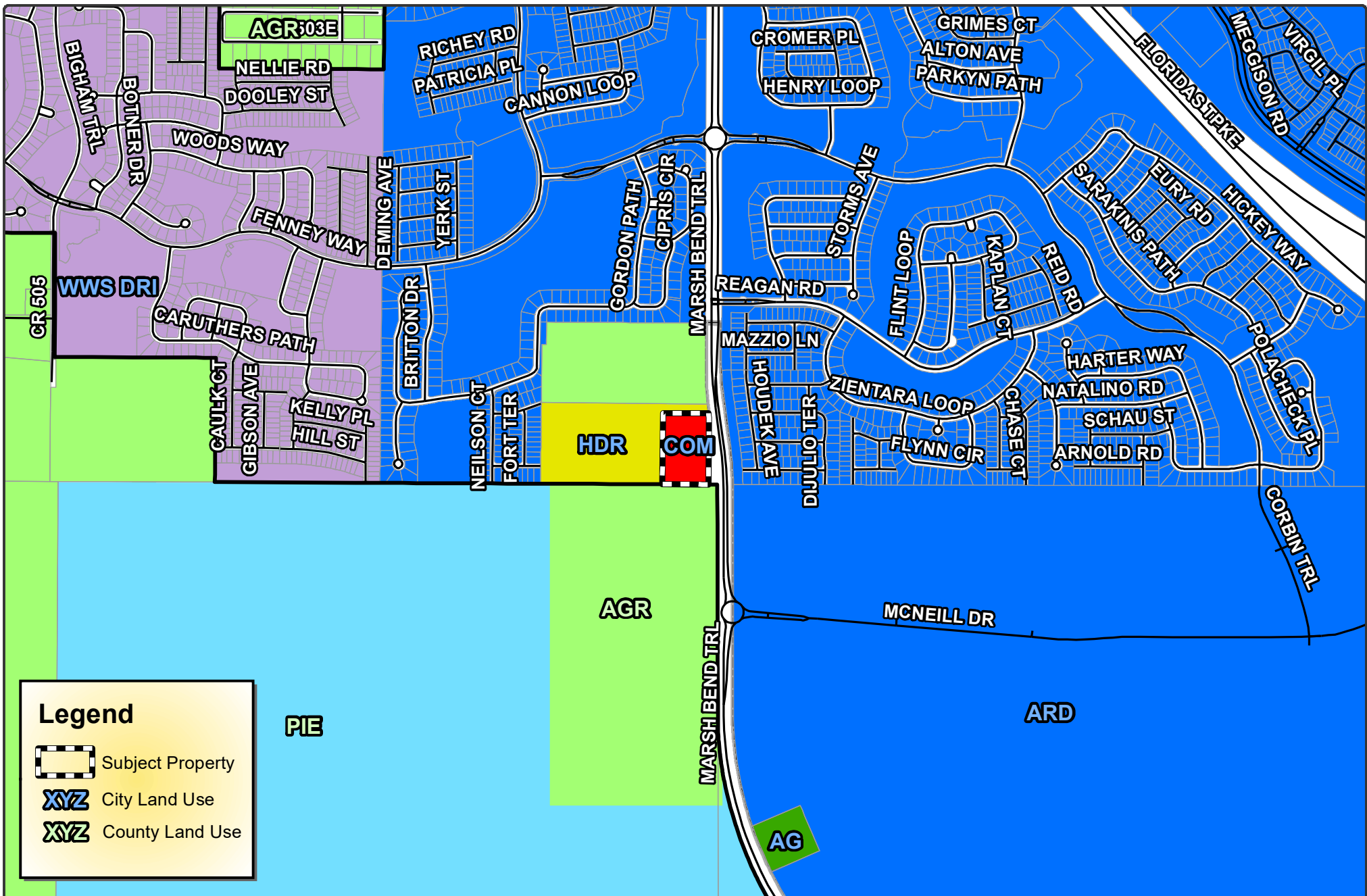
PARCEL G33-154

MAP 1B

**LOCATION
MAP**

**DECEMBER
2022**





City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate
as Local Planning Agency

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate as the Local Planning Agency for a Comprehensive Plan amendment to amend the FLU map designation from Agriculture (Sumter County) to Commercial (City) on 4.86 acres MOL.

Case No: CP 2212-001 Thomas Group Planned Development

Applicant: Ryan Thompson, CHW

Owner: Thomas Group Investments #1 LLC

Parcel Number(s): G33-154

Under Land Development Regulation (LDR) § 1.7(C), the Planning and Zoning Board/Special Magistrate as Local Planning Agency has a duty to make a recommendation to the City Commission on all proposed Comprehensive Plan amendments.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 1.7(D), the Special Magistrate recommends approval of the Comprehensive Plan amendment and gives a favorable recommendation of Ordinance O2022-99 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: RZ 2212-001 Thomas Group Planned Development

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance Number O2022-100 subject to the approval of O2022-99, which establishes a Future Land Use appropriate to the proposed zoning.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case #	RZ 2212-001 Thomas Group Planned Development
Ordinance #	O2022-100
Applicant	Ryan Thompson, CHW
Owner	Thomas Group Investments #1, LLC
Property Location	Located 0.06 miles west of the intersection of Marsh Bend Trail and Myrtle Dr
Parcel Number(s)	G33-154
Date	6/19/2023

The applicant seeks approval from the City Commission to change the zoning district from RR-1 & A10C (Sumter County) to C-2 (City) for the parcel listed above on 4.86 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment CP 2212-001 and Planned Development agreement PD 2212-001.

Pursuant to Land Development Regulation (LDR) § 3.3(C)(4), staff believes the zoning change should be granted based on the following criteria:

(a) Whether the proposed change is consistent with the comprehensive plan;

The proposed amendment is consistent with the policies of the Comprehensive Plan. The Commercial (COM) Future Land Use designation within the 2050 Comprehensive Plan is intended to accommodate a mix of commercial and office uses, as stated under FLU Policy 1.1.1.c. Whereas Objective 1.4 of the Comprehensive Plan states that the city shall cultivate an environment that fosters, supports, and champions economic growth and development. Additionally, the development of a commercial project on currently vacant land would accomplish Objective 1.4, while also conforming to Policy 1.4.5. within the comprehensive plan. Specifically, Policy 1.4.5 encourages and supports the revitalization of vacant and underutilized spaces, which is consistent with the comprehensive plan's desired objectives

and goals.

(b) The existing land use pattern of the surrounding area:

The proposed rezoning to C-2 is compatible with this area's existing land use pattern and would abide by Policies 1.2.8.e., and 1.2.8.I. which seeks to maintain compatibility with adjacent land uses and promote the continued development of a thriving and equitable economy. The proposed development is intended to be an approximately 105,850-square-foot, multi-story storage facility. Services provided by this commercial structure are explicitly designed to cater to the needs of the surrounding residential communities, as expressed in Policy 1.2.8.e., which promotes the development of a thriving, equitable economy.

(c) The possibility of adversely affecting public facilities such as schools, utilities, streets, etc:

Schools: The development is not projected to add any students to Wildwood Schools as it is a non-residential development.

Potable Water & Sewer: There is an existing 12" water main along Marsh Bend Trail to the east of the parcel, as well as a 16" force main. The subject properties are in an existing demand service area according to the 2019 Utility Master Plan. City water and sewer are available to the subject property. The applicant/owner will need to work with City utilities at the site plan stage to connect to City water and sewer.

Streets: Access to the property is proposed from Myrtle Dr, which connects to the southern portion of Marsh Bend Trail. Marsh Bend Trail is currently a four-lane Major Rural Collector Road that operates at LOS D and is maintained by Sumter County. The findings in the accepted TIA were that the LOS of the affected segment of Marsh Bend Trail will not see any deficiencies due to the proposed development. Additionally, the findings within the TIA were that the capacity for Marsh Bend Trail may not be exceeded in 2025 or beyond.

(d) Whether changed or changing conditions make the passage of the proposed amendment necessary:

The surrounding area consists of primarily single-family age-restricted developments (ARD) with a few Medium and High-Density Residential parcels. With no commercial properties within the immediate area. This land use pattern would not conform with Objective 1.4 of the 2050 Comprehensive plan, which seeks to champion economic growth and development activities. The existing land use pattern could also be considered urban sprawl which would contradict Objective 1.2 of the 2050 Comprehensive Plan in the Future Land Use Element section. The rezoning is necessary to accommodate the proposed use of the property and to bring the property into compliance with the proposed Future Land Use designation.

(e) Whether the proposed change will create or excessively increase traffic congestion or otherwise be a detriment to public safety:

The proposed rezoning change to C-2 according to the submitted traffic analysis is estimated to add 160 daily trips, with 10 A.M. & 17 P.M. peak hour trips on Marsh Bend Trail. A full traffic impact analysis has been conducted for maximum density and was accepted by Sumter County. Marsh Bend Trail is a four (4) lane Major Rural Collector Road, which operates at LOS D and is maintained by Sumter County. This is according to FDOT standards, as seen in the submitted TIA. The roadway segment analyzed within this project's Traffic Impact Analysis (TIA) was along Marsh Bend Trail from CR 500 to CR 468. The

findings in the accepted TIA were that the LOS analysis of the afore-mentioned segment indicates that the project does not cause deficiencies to Marsh Bend Trail, therefore no transportation improvements are recommended. Additionally, the findings within the TIA were that the capacity for Marsh Bend Trail may not be exceeded in 2025 or beyond.

(f) Whether the proposed change will be a deterrent to the improvement or development of adjacent property;

The proposed rezoning will not be a deterrent to the improvement or development of adjacent properties. Properties along Marsh Bend Trail are primarily residential developments. Properties that remain in Sumter County's jurisdiction are allowed to develop according to their jurisdiction's future land use and zoning designations.

**ZONING DESIGNATION
SURROUNDING PROPERTIES**

NORTH	R-3 (CITY)
SOUTH	A10C (COUNTY)
EAST	ARD (CITY)
WEST	R-3 (CITY)

If approved, the applicant will be required to submit a site plan to the city prior to development. The site plan will need to follow all requirements as established in the City's Land Development Regulations, Design District Standards, and the agreed-upon Planned Development Agreement.



Shaun Raja,
Planner I, Development Services

ORDINANCE NO. O2022-100

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA;
PROPOSING A ZONING MAP AMENDMENT TO THE
OFFICIAL ZONING MAP IN ACCORDANCE WITH
SECTIONS 3.2 AND 3.3 OF THE LAND DEVELOPMENT
REGULATIONS; PROVIDING FOR CODIFICATION;
PROVIDING FOR CONFLICT; PROVIDING FOR
SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE
DATE.

WHEREAS, the City of Wildwood, Florida, is proposing to amend the Official Zoning Map of said City, to include a rezoning of real property described as follows, to-wit:

Parcel(s) G33-154
Thomas Group Investments #1 LLC (Owner)
4.86 Acres +/-

LEGAL DESCRIPTION:

THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, AND THE EAST 35.57 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, LESS THE NORTH 208.71 FEET THEREOF, LESS THE NORTH 30 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST OF SAID SECTION 33; AND LESS ROAD RIGHT OF WAY,

TOGETHER WITH THAT CERTAIN 1986 FLEETWOOD SINGLE WIDE MOBILE HOME, SERIAL NO. 31700999.

LESS AND EXCEPT:

COMMENCE AT THE SOUTH 1/4 CORNER OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, THENCE RUN S 89°48'04" E ALONG THE SOUTH LINE OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, A DISTANCE OF 1,290.43 FEET; THENCE N 00°30'15" E, A DISTANCE OF 631.15 FEET FROM A POINT OF BEGINNING; THENCE CONTINUE N 00°30'15" E, A DISTANCE OF 487.10 FEET TO A POINT ON A LINE 206.71 FEET (*SIC) SOUTH OF

AND PARALLEL TO THE NORTH LINE OF SAID SECTION 33; THENCE S 89°44'49" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 35.57 FEET; THENCE N 00°30'15" E, A DISTANCE OF 178.71 FEET TO A POINT ON A LINE, 30 FEET SOUTH AND PARALLEL TO SAID NORTH LINE OF SECTION 33; THENCE S 89°44'49" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 1,274.89 FEET TO THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD 501; THENCE S 00°27'25" W, ALONG SAID RIGHT-OF-WAY LINE, A DISTANCE OF 204.43 FEET TO A POINT OF CURVATURE ON A CURVE CONCAVE NORTHEASTERLY, HAVING A RADIUS OF 3,050.00 FEET, A CHORD BEARING OF S 03°42'26" E, A CHORD DISTANCE OF 442.94 FEET; THENCE RUN SOUTHEASTERLY ALONG THE ARC OF SAID CURVE, AND SAID WEST RIGHT-OF-WAY LINE, THROUGH A CENTRAL ANGLE OF 8°19'42", A DISTANCE OF 443.33 FEET; THENCE

S 07°52'16" E, ALONG SAID WEST RIGHT-OF-WAY LINE, A DISTANCE OF 18.91 FEET; THENCE N 89°46'46" W, A DISTANCE OF 1,345.92 FEET TO THE POINT OF BEGINNING.

LESS AND EXCEPT:

A PORTION OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 2675, PAGE 100 OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, SAID LANDS LYING IN SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT THE SOUTHEAST CORNER OF SAID SECTION 33; THENCE ALONG THE SOUTH LINE OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, THE FOLLOWING THREE (3) COURSES AND DISTANCES: 1) THENCE RUN NORTH 89°44'50" WEST, A DISTANCE OF 14.42 FEET TO A POINT ON THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD NO. 501 (A VARIABLE WIDTH RIGHT-OF-WAY PER BOARD OF COUNTY COMMISSIONERS RIGHT-OF-WAY MAP, DATED JANUARY 12, 1994); 2) THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 370.01 FEET TO THE POINT OF BEGINNING; 3) THENCE CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 977.04 FEET TO THE SOUTHEAST CORNER OF VILLAGES OF SOUTHERN OAKS KELLER VILLAS, AS RECORDED IN PLAT BOOK 17, PAGES 3 THROUGH 3A, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SOUTH LINE, RUN NORTH 00°32'32" EAST, ALONG THE EAST LINE OF SAID PLATTED LANDS, A DISTANCE OF 631.00 FEET TO THE SOUTHWEST CORNER OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 3270, PAGE 322, OF THE PUBLIC RECORDS OF SUMTER

COUNTY, FLORIDA; THENCE DEPARTING SAID EAST LINE, RUN SOUTH 89°44'31" EAST, ALONG THE SOUTH LINE OF SAID LANDS, A DISTANCE OF 1346.20 FEET TO A POINT ON THE AFORESAID WEST RIGHT-OF-WAY OF COUNTY ROAD NO. 501; THENCE DEPARTING SAID SOUTH LINE, RUN ALONG SAID WEST RIGHT-OF-WAY THE FOLLOWING TWO (2) COURSE AND DISTANCES: 1) THENCE RUN SOUTH 07°47'53" EAST, A DISTANCE OF 8.28 FEET; 2) THENCE RUN SOUTH 00°34'30" WEST, A DISTANCE OF 51.81 FEET; THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, RUN NORTH 89°44'31" WEST, A DISTANCE OF 370.01 FEET; THENCE RUN SOUTH 00°34'30" WEST, A DISTANCE OF 570.91 FEET TO THE POINT OF BEGINNING.

*SIC = SCRIVENER ERROR: LEGAL DESCRIPTION CALLS FOR A POINT 206.71 FEET, BUT IT SHOULD BE 208.71 FEET.

(SEE SURVEYOR'S NOTE #9)

This property is to be reclassified from RR-1 & A10C (Sumter County) to C-2 (City) containing 4.86 acres, more or less;

AND WHEREAS, the rezoning is consistent with the City's Comprehensive Plan and Land Development Regulations.

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

SECTION 1. The Official Zoning Map of the City of Wildwood, Florida is hereby amended to include the above-referenced property as indicated above. The amendment to the Official Zoning Map is attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 2. All ordinances or parts of ordinances in conflict herewith, be, and the same are hereby repealed.

SECTION 3. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 4. This Ordinance shall take effect 31 days after its final reading by the City Commission of the City of Wildwood.

DONE AND ORDAINED this ____ day of _____, 2023, by the City Commission of the City of Wildwood, Florida.

CITY COMMISSION
CITY OF WILDWOOD, FLORIDA

Ed Wolf, Mayor

ATTEST: _____
Susan Patterson, City Clerk

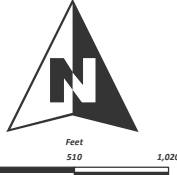
First Reading: _____

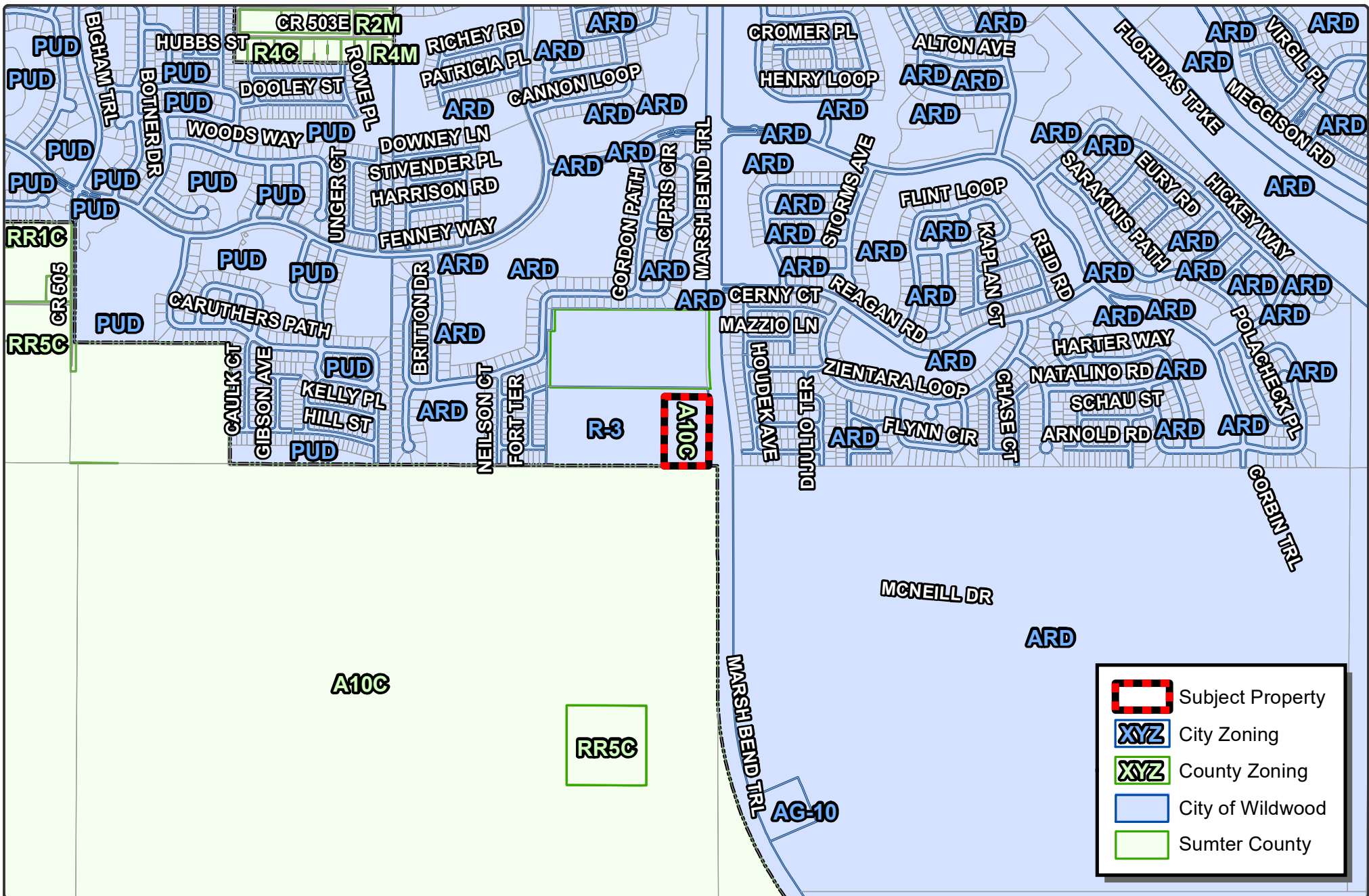
Second Reading: _____

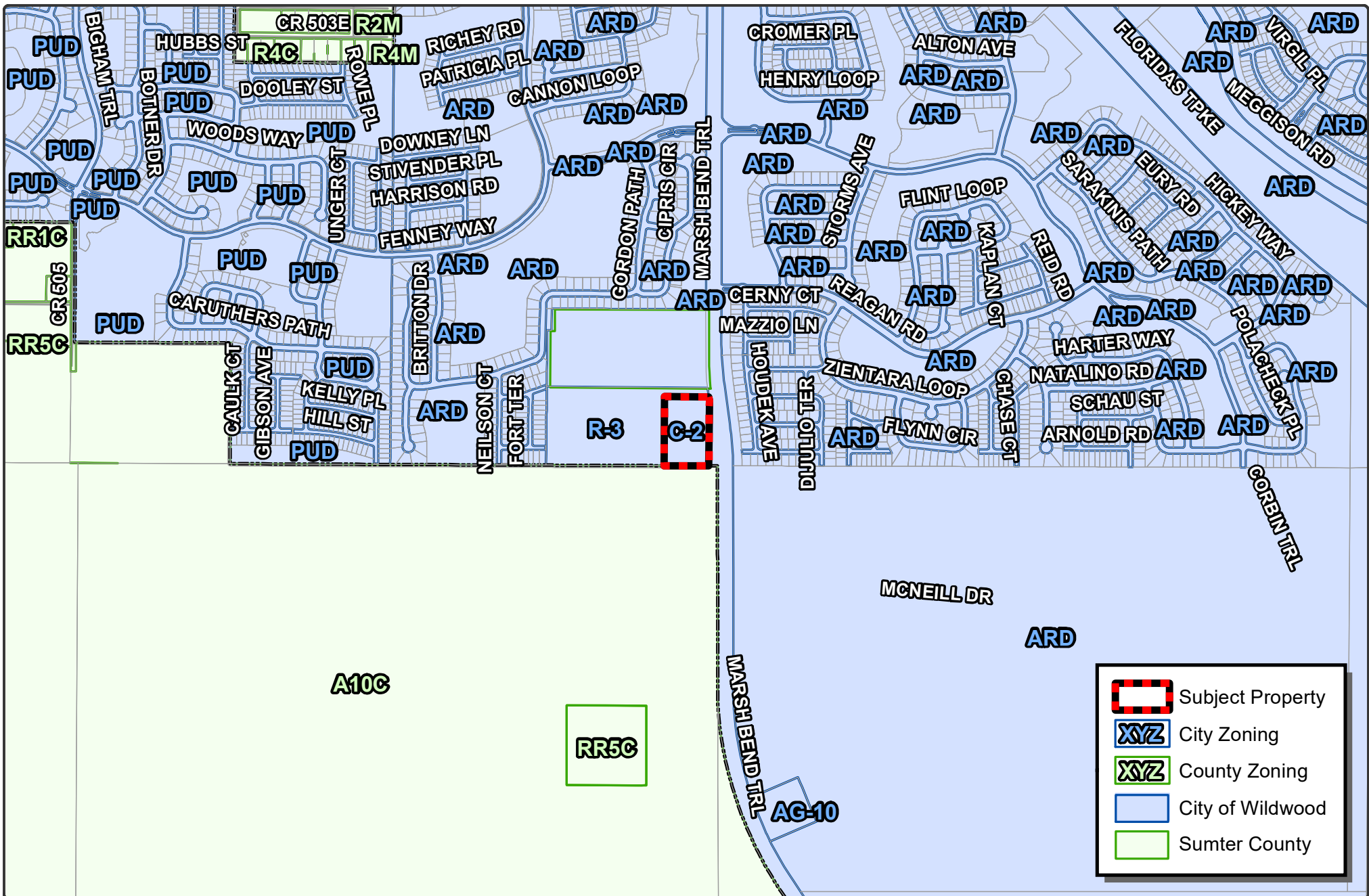
Approved as to form:

City Attorney



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 Feet 0 510 1,020	CP/RZ 2212-001 THOMAS GROUP PLANNED DEVELOPMENT PARCEL G33-154	MAP 1B LOCATION MAP DECEMBER 2022
--	---	---	--	--





City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for a Zoning Map Amendment to change the zoning district from RR-1 & A10C (Sumter County) to C-2 (City) on 4.86 acres MOL.

Case # RZ 2212-001 Thomas Group Planned Development
Applicant Ryan Thompson, CHW
Owner Thomas Group Investments #1 LLC
Parcel Number(s) G33-154

Under Land Development Regulation (LDR) § 1.7(B)(2), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed Zoning Map amendments.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 1.7(D), the Special Magistrate recommends approval of the Zoning Map amendment and gives a favorable recommendation of Ordinance O2022-100 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: PD 2212-001 Thomas Group Planned Development

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance O2023-19.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case #	PD 2212-001 Thomas Group Planned Development
Ordinance #	O2023-19
Applicant	CHW, Ryan Thompson
Owner	Thomas Group Investments #1, LLC
Property Location	Generally located west at the intersection of Marsh Bend Trail and Myrtle Dr
Parcel Number(s)	G33-154
Date	6/19/2023

The applicant, Ryan Thompson of CHW, representing Thomas Group Investments #1, LLC seeks approval from the City Commission for a Planned Development (PD) amendment for the development of a multistory indoor storage facility, of approximately one hundred-five thousand eight hundred and fifty (105,850) square feet, and a floor area ratio of 0.5. Encompassing a parcel of approximately 4.86 acres MOL. The only permitted use stated is for a multistory indoor storage facility, consistent with C-2 zoning, while maintaining a minimum of twenty (20) percent open space. This request will run concurrently with CP/RZ 2212-001 which seeks to change both the future land use and zoning of the designated parcels.

Per City of Wildwood Land Development Regulations Sec. 8.6. (E), the City Commission may approve a PD amendment only after substantial, competent evidence has been presented that allows the Commission to make the following findings:

(1) That the proposed change is consistent with the comprehensive plan;

The proposed amendment is consistent with the comprehensive plan. The proposed Thomas Group development is seeking a Future Land Use (FLU) designation of Commercial for a multi-story indoor storage facility. This use would conform with the 2050 Comprehensive Plan policy 1.2.7(a) and (b). The proposed development would contribute to a mix of land uses in

the area, while also promoting compact design principles with its compact and vertical design.

(2) That the proposed change will not adversely affect public facilities such as schools, utilities, streets, etc;

The proposed change is not expected to adversely affect public facilities. A full traffic analysis has been conducted as Wildwood Mini-Storage for maximum density and was accepted by Sumter County. The study's conclusion found that the added trips do not cause deficiencies to Marsh Bend Trail and thus no transportation improvements were recommended.

The subject properties are in an existing demand service area according to the 2019 Utility Master Plan. City water and sewer are available to the subject property. Separately, this is a commercial development, and Wildwood School's capacity would not be affected by the proposed development.

(3) That changed or changing conditions makes the passage of the proposed amendment necessary;

Changing conditions make the proposed amendment necessary. The applicant is proposing a one hundred five thousand eight hundred and fifty (105,850) square foot indoor storage facility to meet the needs of residents and those in the surrounding area. This would provide off-site storage for the rapidly growing residential developments in the vicinity.

(4) That the proposed change will not create or excessively increase traffic congestion or otherwise be a detriment to public safety; and

TIA was accepted by Sumter County on 11/22/2022.

(5) That the proposed change will not be a deterrent to the improvement or development of adjacent property.

The proposed change will not be a deterrent to the improvement or development of adjacent properties. Adjacent properties will be allowed to develop according to their future land use and zoning designations assigned by their jurisdiction.

A handwritten signature in black ink, reading "Shaun Raja". The signature is written in a cursive, flowing style.

Shaun Raja,
Planner, Development Services Department

ORDINANCE NO. O2022-19

AN ORDINANCE OF THE CITY OF WILDWOOD GRANTING A REQUEST FOR A PLANNED DEVELOPMENT PURSUANT TO SECTION 8.6 OF THE LAND DEVELOPMENT REGULATIONS FOR CERTAIN PROPERTY WITHIN THE CITY OF WILDWOOD, FLORIDA; OWNED BY THOMAS GROUP INVESTMENTS #1, LLC; PROVIDING FOR SEVERABILITY; PROVIDING FOR CODIFICATION; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the first Thomas Group Planned Development Agreement was filed with the City of Wildwood on or about December 5, 2022;

WHEREAS, it is the intent of the City Commission to promote more efficient uses of land, encourage compatible and harmonious development of contiguous lands, provide flexibility and variety to meet changing needs, and administer mixed use developments in conformance with the goals, objectives, and policies of the City's Comprehensive Plan;

WHEREAS, the City recognizes the Planned Development process as a suitable avenue for planning unique developments which may not meet the specific requirements set forth in the Land Development Regulations and Design District Standards, but still facilitate the objectives stated above;

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

The application filed by CHW on behalf of Thomas Group Investments #1, LLC, a Florida Limited Liability Company (hereinafter referred to as the "Developer"), for a Planned Development was heard by and before the City Commission, Wildwood, Florida on this ____ day of ____ 2023. Based upon the verified application and supporting documents, analyses, maps, charts, other evidence and instruments, the advice, report and recommendations of the Project Review Committee and the testimony adduced, and evidence received at the Public Hearing by the Planning and Zoning Board on _____, 2023 and otherwise being fully advised, the City Commission does hereby find and determine as follows:

SECTION 1: GENERAL FINDINGS

- A. That the Thomas Group Planned Development Application (hereinafter referred to as the "Project") was duly and properly filed herein on December 5, 2022 by the Developer.
- B. That all fees required to be borne and paid by the Developer have been paid in accordance with the City of Wildwood Fee Schedule.
- C. That the Project was reviewed by the Project Review Committee and found to meet or exceed the minimum standards of the City's Comprehensive Plan, Land Development Regulations, Code of Ordinances, and all other applicable ordinances and regulations.

- D. That the Developer intends to develop a Project consisting of 4.86 acres, more or less, which is situated in Wildwood, Florida. This land is legally described in "**Exhibit A**" attached hereto.
- E. That the Developer has complied with the conceptual development plan provision as required by Section 8.4 of the Land Development Regulations (LDR).
- F. That the City has complied with the due notice requirements of subsection 8.2 (E) and (F) of the Land Development Regulations.

SECTION 2: FINDINGS REGARDING PLANNED DEVELOPMENT OVERLAY

- A. That the Developer has applied for a Planned Development of the lands described in "**Exhibit A**".
- B. That the zoning districts of the subject land described in "**Exhibit A**" is classified as "C-2" on the City of Wildwood Zoning Map.
- C. That the Project is consistent with both the City of Wildwood Comprehensive Plan, the intent and purpose of the City of Wildwood Land Development Regulations, and does promote the public health, safety, morals, welfare, and orderly growth of the City of Wildwood.
- D. That the City of Wildwood Land Development Regulations are consistent with the provisions of the "Planned Development Agreement" as hereinafter set forth in Section 3 of this Ordinance. With respect to any conflict between the Land Development Regulations and the "Planned Development Agreement", the provisions of the "Planned Development Agreement" shall govern. Unless specific conditions are included in the "Planned Development Agreement" waiving or replacing the terms and conditions of the Land Development Regulations, the terms and conditions of the most current Land Development Regulations shall prevail.
- E. This Ordinance shall become effective immediately upon its approval and adoption by the City Commission ("Effective Date").

SECTION 3: PLANNED DEVELOPMENT AGREEMENT: GENERAL PROVISIONS

- A. Development Concept. The Project shall be developed as a Planned Development substantially in accordance with this Ordinance. This Planned Development Agreement shall govern the development of the Project.
- B. Conceptual Development Plan. The Project includes a conceptual development plan pursuant to Section 8.4 of the Land Development Regulations. The conceptual development plan prepared by CHW dated December 5, 2022 and revised on _____, 2023 is incorporated into this Ordinance as "**Exhibit B**" ("Conceptual Development Plan") attached hereto. The conceptual development plan is substantially consistent with City of Wildwood Comprehensive Plan.
 - 1. The conceptual development plan illustrates the general location of the following land uses:

- a. Multistory Indoor Storage Facility
- b. Stormwater Management Facility (SMF)
- c. Transportation systems and parking facilities
- d. Existing potable water and sanitary sewer locations

2. The conceptual development plan is conceptual in nature and may be affected or modified by final zoning approval and conditions, by floodplain management regulations, final wetland or protected species locations and jurisdictional boundaries, final engineering, permitting, surveys, and conservation easements. If there are any inconsistencies between the written ordinance and the conceptual development plan, the written ordinance will supersede.

C. Development Program. The Project shall be developed in a single phase in accordance with the Conceptual Development Plan and this Section.

- 1) TYPE OF DEVELOPMENT. The Project is intended to consist of a commercial multistory indoor storage facility.

The following shall apply to the Project:

1. Land Use Breakdown. Acreages devoted to each land use within the Project shall be in accordance with the following table:

Land Use	Total (Acres)	Percentage of Total Site
Development Area	3.89	80%
Open Space	0.97	20%
Total	4.86	100%

2. Maximum Development Potential. Commercial development shall not exceed the following as permitted within the C-2 zoning district:

Multistory Indoor Storage Facility	
No. of square feet, max.:	105,850
Floor Area Ratio, max.:	±0.5
Lot area and lot width, min.:	None

3. Signage. All signage identifying the project shall comply with the City of Wildwood Land Development Regulations and Design District Standards

D. Amendments. All modifications requiring an amendment to the Planned Development Agreement shall require review by the Project Review Committee, review and recommendation of the Planning and Zoning Board and action by the City Commission in the same manner as an Application for Planned Development.

E. Future Approvals. After this Ordinance is recorded, and prior to any construction occurring, a site plan or subdivision preliminary plan shall be submitted for review and approval in the manner required by Chapter 4 or Chapter 5 of the Land Development

Regulations, whichever Chapter is applicable.

1. Developer's Agreement. Prior to approval of a site plan or a subdivision preliminary plan, the City and the Developer agree to enter into Utility or Developer's Agreements to address the provision of water, wastewater and reuse water to the Project. Said agreement(s) shall also specify, among other items, the ownership and maintenance of infrastructure associated with the Project.

- F. Permitted Uses. The only permitted use is a Multistory Indoor Storage Facility, consistent with the C-2 zoning district.
- G. Development Standards. Unless otherwise noted, the Project shall adhere to the zoning district standards prescribed in Chapter 3 of the Land Development Regulations for the C-2 zoning district on land designated as such.

Building setbacks for external property lines shall be as follows:

Commercial		
Front, min.	East (CR 501)	25'
Rear, min.	West	15'
Side, min.	North and South	15'

- H. Design District Standards. Due to the Project's location within the Neighborhood Design District, the Project will meet applicable City of Wildwood's Design District Standards, unless otherwise noted in this Ordinance.
- I. Recreation and Open Space. The Project shall maintain a minimum of 20% (0.97 acres) open space.

1. Buffers. The Project shall establish and maintain the following buffers:

Direction	Width (Ft)
North	20'
East	20'
South	20'
West	20'

Buffers shall contain landscape material in accordance with the Design District Standards. Regulated trees located within the required buffer area may not be removed unless approved by a certified arborist due to disease or natural disaster. Tree protection must occur consistent with LDR Section 6.10. A tree removal permit shall be obtained from the Development Services Department, per LDR Subsection 6.10(E).

2. Open Space. Open space shall include wetlands, preservation areas, greenspace, and landscape buffers. Open space may include areas such as trails, plazas, courtyards, and other similar public areas. Open space may also include recreation areas and amenities provided said amenities or area is not enclosed with air conditioned space. For purposes of meeting open space requirements, up to 50% of the drainage retention areas may be included in the open space calculation; however, the amount of open space credit from drainage retention areas shall not exceed 50% of the open space requirement. Open space shall not include open bodies of water, rights-of-way (public or private), yards or lots of record per plat, driveways, off street parking areas or other impervious surface areas that do not meet the criteria.

J. Environmental Considerations. An ecological site assessment was conducted in November 2020 by Bio-Tech Consulting, Inc. No federally listed or threatened species were identified onsite. The Project contains no documented environmental features, including FEMA floodplain or National Wetland Inventory wetlands, that warrant protection or preservation.

K. Public Facilities.

1. Potable Water, Wastewater, and Reuse Water. The Project shall be connected to the City's Potable Water and Sanitary Sewer systems prior to any certificates of occupancy being issued. The Project will also connect to the City's reuse water system prior to certificates of occupancy being issued, if available. Reuse water is not currently available to the Project.
2. Solid Waste. Solid waste services shall be provided by the City or the City's contracted refuse service provider.
3. Stormwater. The Project may utilize both above-ground and underground Stormwater Management Facilities (SMF) for the permitted use, increasing efficiency of the system and reducing the land area necessary to serve the use. The SMF shall be designed to City LDR Section 6.4 and Southwest Florida Water Management District design requirements, which requires preventing flooding of adjacent sites and ensuring the integrity of receiving waters.
4. Underground Utilities. All utilities on site shall be located underground. Developer is responsible for running utilities underground for the Project. The City shall insure that any utilities within any public utility easement serving lands other than the Project shall be underground.
5. Lighting. Exterior lighting of all buildings and parking lots shall be designed so that light is not directed off the Project. Exterior light fixtures should be fully shielded or designed with light-angle cut-offs to eliminate spill light, trespass light and glare. Lighting throughout the Project will comply with the requirements set forth in the City Land Development Code and Design District Standards.
6. Easements. The easement agreement granting access from Marsh Bend Trail through Sumter County tax parcel G33-025 has been recorded (B: 4389 P: 698).

The easement agreement to retain access internal to the site shall be recorded following the Site Plan approval.

7. Transportation: Per the Traffic Impact Analysis (TIA) conducted on November 5, 2022 by CHW and attached hereto as Exhibit C, no improvements to the project driveways or adjacent roadways are warranted.
8. Transportation Concurrency: The responsibility to fund the improvements listed in Section L of this ordinance will be the responsibility of the Applicant/Developer. These improvements were identified in the Traffic Impact Analysis approved by Sumter County Public Works and are attached as Exhibit C.
9. Fire. The Florida Fire Prevention Code, 7th Edition applies to this development design.
10. Police. All traffic control signals or devices must comply with the Florida State Statutes regarding the installation. All traffic control signals or devices must conform to the manual and specifications published by the Florida Department of Transportation, to include but not limited to signs, size and height.

L. Access, Parking, and Transportation.

1. Access. The Project's access is from a shared driveway on Marsh Bend Trail. A driveway permit for access on Marsh Bend Trail (CR 501) will be obtained from Sumter County.
2. Transportation Impact Fees: Developer acknowledges that the Project is subject to Sumter County's impact fee ordinance.
3. Cross and shared access. Shared access will serve the Project site as well as both adjacent properties to the north and west. Cross access to the vacant adjacent property to the south is not possible due to the property being owned by the Federal government land used for the Coleman Correctional Complex.

Transportation System Improvements. There are no improvements identified in the Traffic Impact Analysis approved by Sumter County Public Works on 12 December 2022. The study's roadway segment LOS analysis indicates that the added project trips does not cause deficiencies to Marsh Bend Trail, therefore, no transportation improvements are recommended to support the project traffic.

Developer is responsible for constructing these improvements during Phase 1 of the Development.

4. Internal vehicular circulation. Internal vehicular circulation will be provided by drive aisles, not roadways.
5. Parking. The minimum number of parking spaces required for the Indoor Storage

Facility is four (4) spaces.

6. Pedestrian Facilities. No internal sidewalks are warranted due to the proposed automobile-oriented use.
- M. Maintenance of Common Areas and Open Spaces. Maintenance and repair of structures, paved areas (internal roadways and parking), lawn mowing, and landscaping maintenance of all common areas within the Project shall be the responsibility of the property owner or its designee such as a property owners association, at no cost or obligation to the City. In the event of noncompliance with the City Land Development Regulations, the City maintains the right to enforce same against the Developer, its successors or assigns, as may be applicable, by and through its code enforcement procedure and special magistrate. The Developer, its successors and/or assigns, shall provide guidelines to the City for approval, not to be reasonably withheld, conditioned, or delayed, for the maintenance of common areas. The City will conduct annual inspections of the approved landscaping. The City will be granted the right to enforce the common areas maintenance obligations against the Developer, its successors and/or assigns, as may be applicable, and to be reimbursed for the reasonable attorney's fees, costs and expenses, as may be reasonably incurred by the City.
- N. Enforcement of Rules and Regulations. For the maintenance of the common areas referenced in Section 3.(M) above, the applicable provisions in the Guidelines: (i) shall be made applicable to the Project; and (ii) shall be reviewed/approved by the City of Wildwood and a certificate of occupancy being issued for completed improvements; and (iii) will provide that the City of Wildwood shall have the right, but not the obligation, to enforce such maintenance obligations against a violating party and that the City should be entitled to reasonable attorney's fees and costs for enforcement regardless of whether or not a suit has been filed.
- O. Impact Fees. The Planned Development shall be subject to all impact fees applicable at the time of permitting. All impact fees are to be paid before issuance of any building permit. Proof of Sumter County impact fees paid shall be provided to the City of Wildwood. Any applicable impact fees adopted by the City of Wildwood, Sumter County, or the Sumter County School Board prior to issuance of building permits shall also be applicable to the Planned Development.
- P. Expiration of Planned Development Agreement. Significant construction must begin within the Project boundary (as legally described in "Exhibit A") within 24 months of the final adoption of the Planned Development Agreement. If no significant construction has started on the approved Project within 24 months, the Planned Development shall lapse and be of no further effect. The City Commission may extend the Planned Development for periods of up to twelve (12) months provided the applicant can show good cause why the said Project was delayed under the originally approved Planned Development Agreement. However, the City Commission shall not allow extensions beyond 48 months after the effective date of this Ordinance.

SECTION 4. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 5. This Ordinance shall be effective upon adoption during the second and final reading by the City of Wildwood City Commission.

DONE AND ORDAINED in regular session of the City Commission of the City of Wildwood, Sumter County, Florida, this _____ day of _____, 2023.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

ED WOLF, MAYOR

ATTEST: _____
Susan Patterson, City Clerk

First Reading: _____

Second Reading: _____

Approved as to Form:

City Attorney

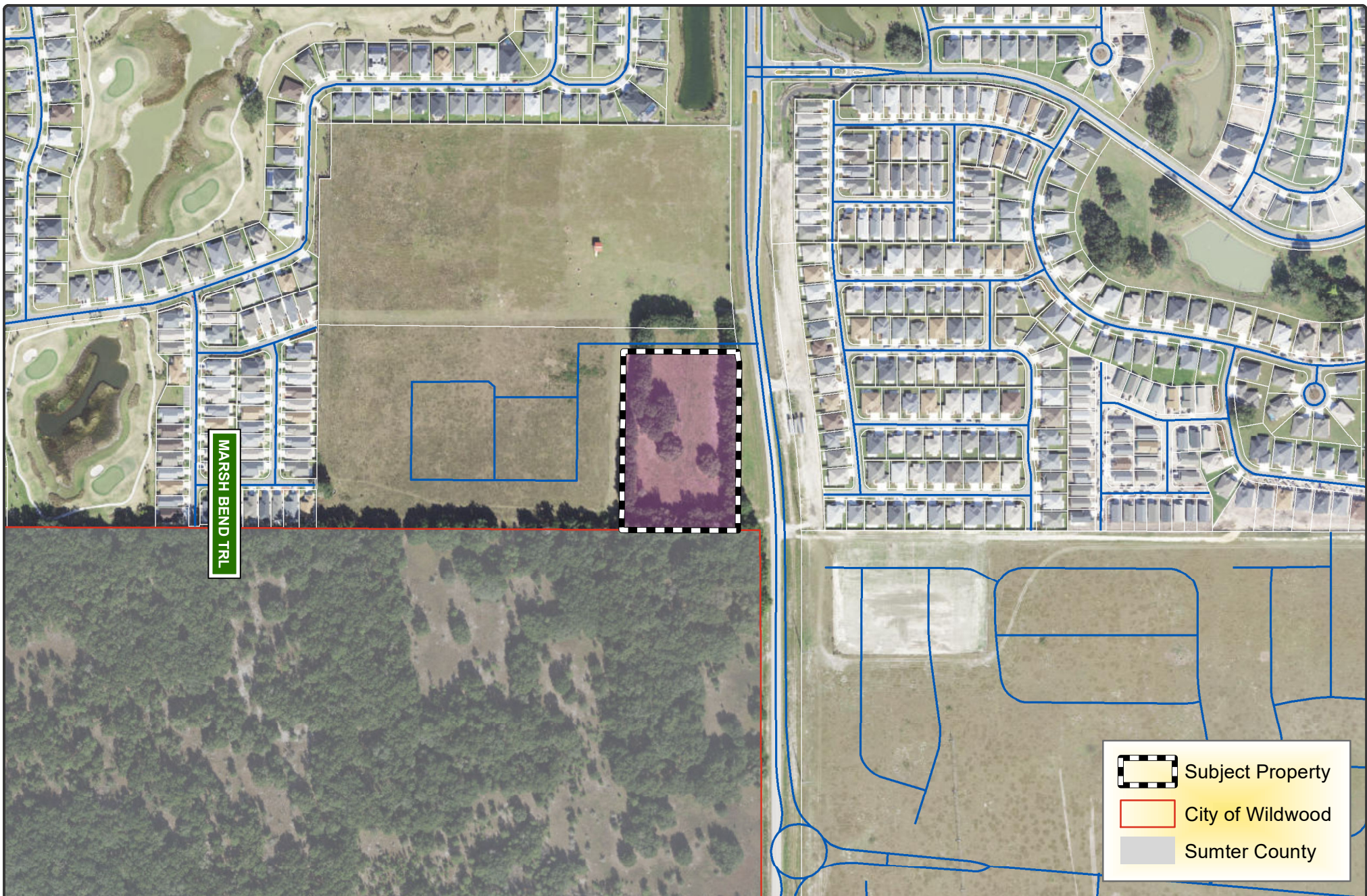


EXHIBIT A**DATE:** JUNE 01, 2022**PROJECT NAME:****PROJECT NO:** 22-0139**DESCRIPTION FOR:** THOMAS WILDWOOD SSCPA AND REZONING**LEGAL DESCRIPTION: (BY SURVEYOR)**

THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, AND THE EAST 35.57 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, LESS THE NORTH 208.71 FEET THEREOF, LESS THE NORTH 30 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST OF SAID SECTION 33; AND LESS ROAD RIGHT OF WAY,

TOGETHER WITH THAT CERTAIN 1986 FLEETWOOD SINGLE WIDE MOBILE HOME, SERIAL NO. 31700999.

LESS AND EXCEPT:

COMMENCE AT THE SOUTH 1/4 CORNER OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, THENCE RUN S 89°48'04" E ALONG THE SOUTH LINE OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, A DISTANCE OF 1,290.43 FEET; THENCE N 00°30'15" E, A DISTANCE OF 631.15 FEET FROM A POINT OF BEGINNING; THENCE CONTINUE N 00°30'15" E, A DISTANCE OF 487.10 FEET TO A POINT ON A LINE 206.71 FEET (*SIC) SOUTH OF AND PARALLEL TO THE NORTH LINE OF SAID SECTION 33; THENCE S 89°44'49" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 35.57 FEET; THENCE N 00°30'15" E, A DISTANCE OF 178.71 FEET TO A POINT ON A LINE, 30 FEET SOUTH AND PARALLEL TO SAID NORTH LINE OF SECTION 33; THENCE S 89°44'49" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 1,274.89 FEET TO THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD 501; THENCE S 00°27'25" W, ALONG SAID RIGHT-OF-WAY LINE, A DISTANCE OF 204.43 FEET TO A POINT OF CURVATURE ON A CURVE CONCAVE NORTHEASTERLY, HAVING A RADIUS OF 3,050.00 FEET, A CHORD BEARING OF S 03°42'26" E, A CHORD DISTANCE OF 442.94 FEET; THENCE RUN SOUTHEASTERLY ALONG THE ARC OF SAID CURVE, AND SAID WEST RIGHT-OF-WAY LINE, THROUGH A CENTRAL ANGLE OF 8°19'42", A DISTANCE OF 443.33 FEET; THENCE S 07°52'16" E, ALONG SAID WEST RIGHT-OF-WAY LINE, A DISTANCE OF 18.91 FEET; THENCE N 89°46'46" W, A DISTANCE OF 1,345.92 FEET TO THE POINT OF BEGINNING.

LESS AND EXCEPT:

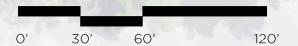
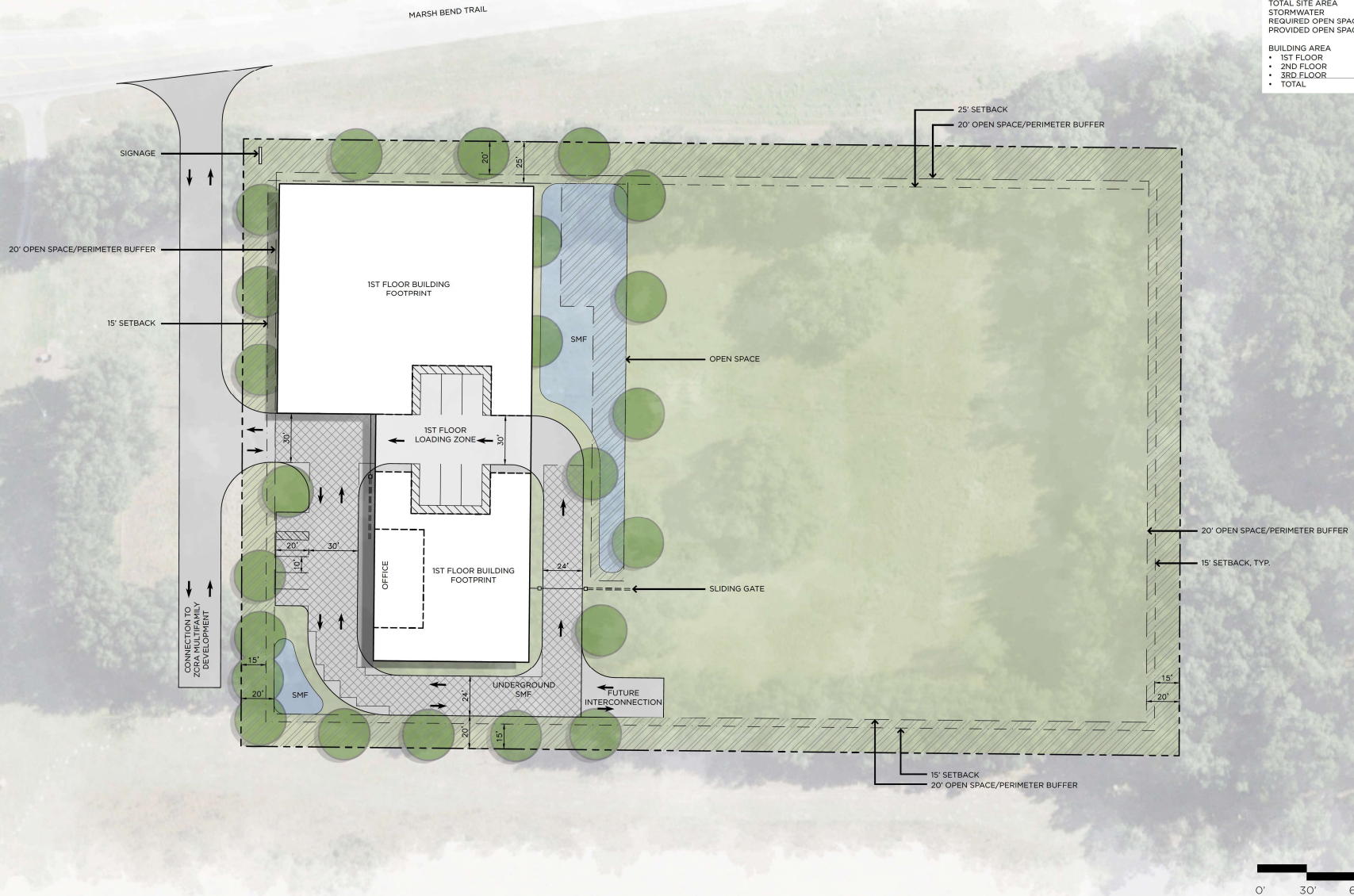
A PORTION OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 2675, PAGE 100 OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, SAID LANDS LYING IN SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

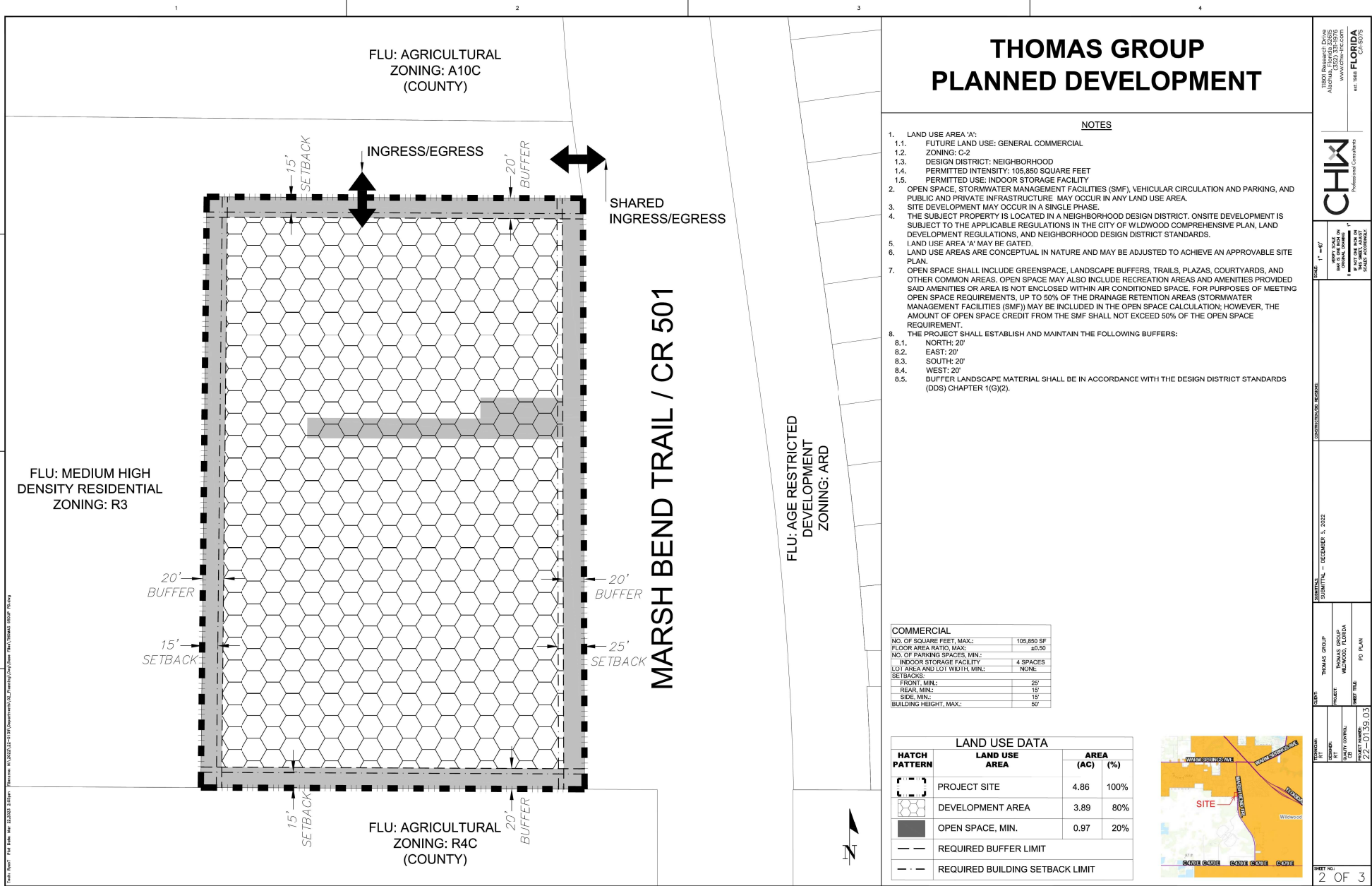
COMMENCE AT THE SOUTHEAST CORNER OF SAID SECTION 33; THENCE ALONG THE SOUTH LINE OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, THE FOLLOWING THREE (3) COURSES AND DISTANCES: 1) THENCE RUN NORTH 89°44'50" WEST, A DISTANCE OF 14.42 FEET TO A POINT ON THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD NO. 501 (A VARIABLE WIDTH RIGHT-OF-WAY PER BOARD OF COUNTY COMMISSIONERS RIGHT-OF-WAY MAP, DATED JANUARY 12, 1994); 2) THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 370.01 FEET TO THE POINT OF BEGINNING; 3) THENCE CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 977.04 FEET TO THE SOUTHEAST CORNER OF VILLAGES OF SOUTHERN OAKS KELLER VILLAS, AS RECORDED IN PLAT BOOK 17, PAGES 3 THROUGH 3A, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SOUTH LINE, RUN NORTH 00°32'32" EAST, ALONG THE EAST LINE OF SAID PLATTED LANDS, A DISTANCE OF 631.00 FEET TO THE SOUTHWEST CORNER OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 3270, PAGE 322, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID EAST LINE, RUN SOUTH 89°44'31" EAST, ALONG THE SOUTH LINE OF SAID LANDS, A DISTANCE OF 1346.20 FEET TO A POINT ON THE AFORESAID WEST RIGHT-OF-WAY OF COUNTY ROAD NO. 501; THENCE DEPARTING SAID SOUTH LINE, RUN ALONG SAID WEST RIGHT-OF-WAY THE FOLLOWING TWO (2) COURSE AND DISTANCES: 1) THENCE RUN SOUTH 07°47'53" EAST, A DISTANCE OF 8.28 FEET; 2) THENCE RUN SOUTH 00°34'30" WEST, A DISTANCE OF 51.81 FEET; THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, RUN NORTH 89°44'31" WEST, A DISTANCE OF 370.01 FEET; THENCE RUN SOUTH 00°34'30" WEST, A DISTANCE OF 570.91 FEET TO THE POINT OF BEGINNING.

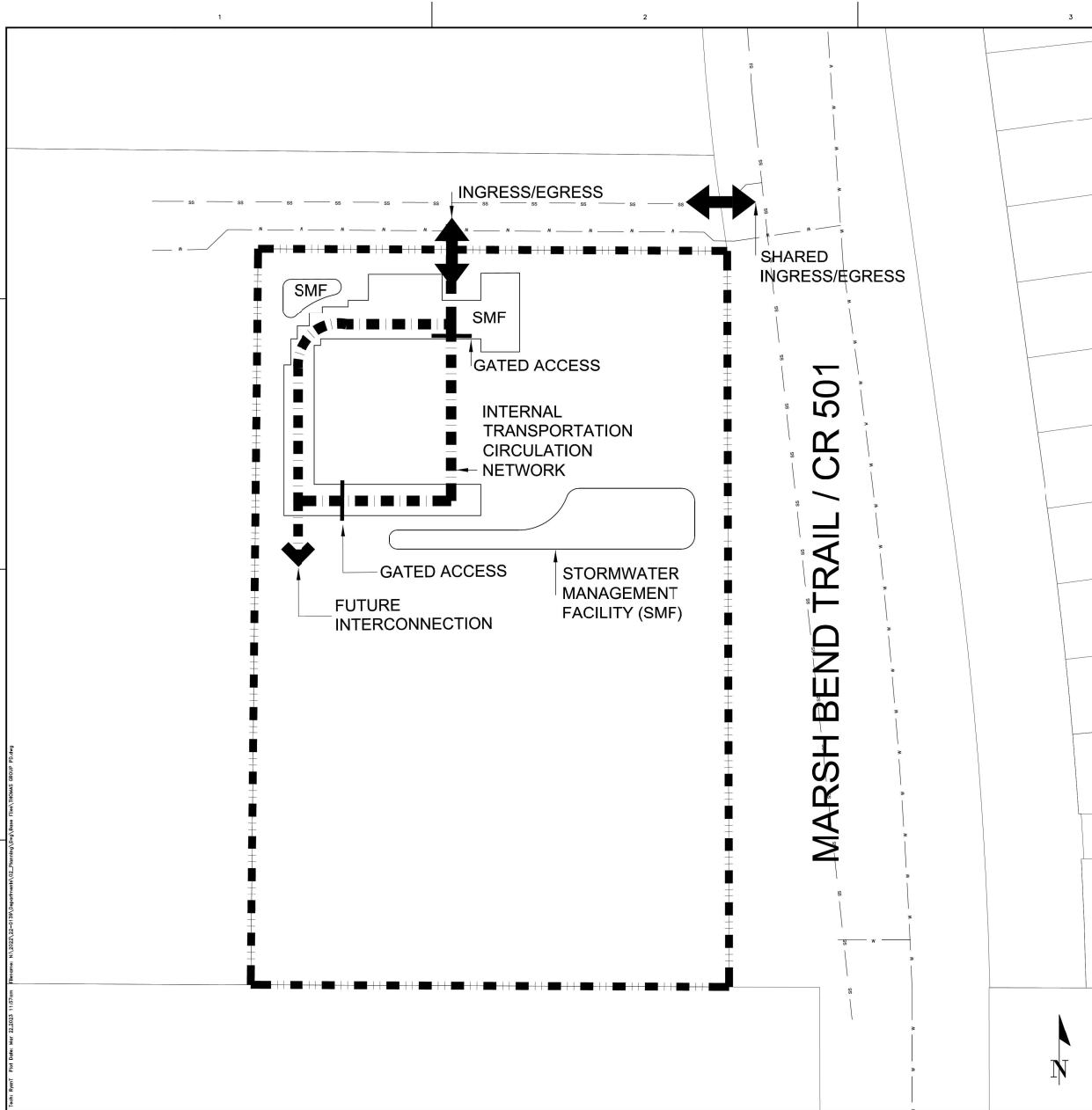
*SIC = SCRIVENER ERROR: LEGAL DESCRIPTION CALLS FOR A POINT 206.71 FEET, BUT IT SHOULD BE 208.71 FEET. (SEE SURVEYOR'S NOTE #9)

EXHIBIT B

SITE DEVELOPMENT DATA	
TOTAL SITE AREA	4.86 ACRES
STORMWATER	22,740 SF
REQUIRED OPEN SPACE	42,250 SF
PROVIDED OPEN SPACE	42,250 SF
BUILDING AREA	
• 1ST FLOOR	±31,850 SF
• 2ND FLOOR	±37,000 SF
• 3RD FLOOR	±37,000 SF
• TOTAL	105,800 SF







THOMAS GROUP PLANNED DEVELOPMENT

NOTES

1. POTABLE WATER: FUTURE DEVELOPMENT WILL CONNECT TO AN EXISTING 8" WATER MAIN WITHIN THE SHARED DRIVEWAY EXTENDING FROM MARSH BEND TRAIL.
2. SANITARY SEWER: FUTURE DEVELOPMENT WILL CONNECT TO AN EXISTING FORCE MAIN WITHIN THE SHARED DRIVEWAY EXTENDING FROM MARSH BEND TRAIL.
3. REUSE: NOT AVAILABLE TO SERVE THE SUBJECT PROPERTY, THE SITE WILL BE REQUIRED TO CONNECT TO THE REUSE SYSTEM IF AVAILABLE IN THE FUTURE.
4. OPEN SPACE, STORMWATER MANAGEMENT FACILITIES (SMF), VEHICULAR CIRCULATION AND PARKING, AND PUBLIC AND PRIVATE INFRASTRUCTURE MAY OCCUR IN ANY LAND USE AREA.
5. ACCESS: AN INTERNAL DRIVE FROM MARSH BEND TRAIL SHALL BE SHARED BETWEEN THE PROJECT SITE AND ADJACENT PROPERTIES NORTH AND WEST.
6. INTERNAL CIRCULATION ALIGNMENTS AND PARKING AREAS ARE CONCEPTUAL AND SUBJECT TO FINAL DESIGN.
7. STORMWATER MANAGEMENT FACILITIES DO NOT REFLECT EXACT SIZE OR LOCATION AND ARE SUBJECT TO FINAL DESIGN.

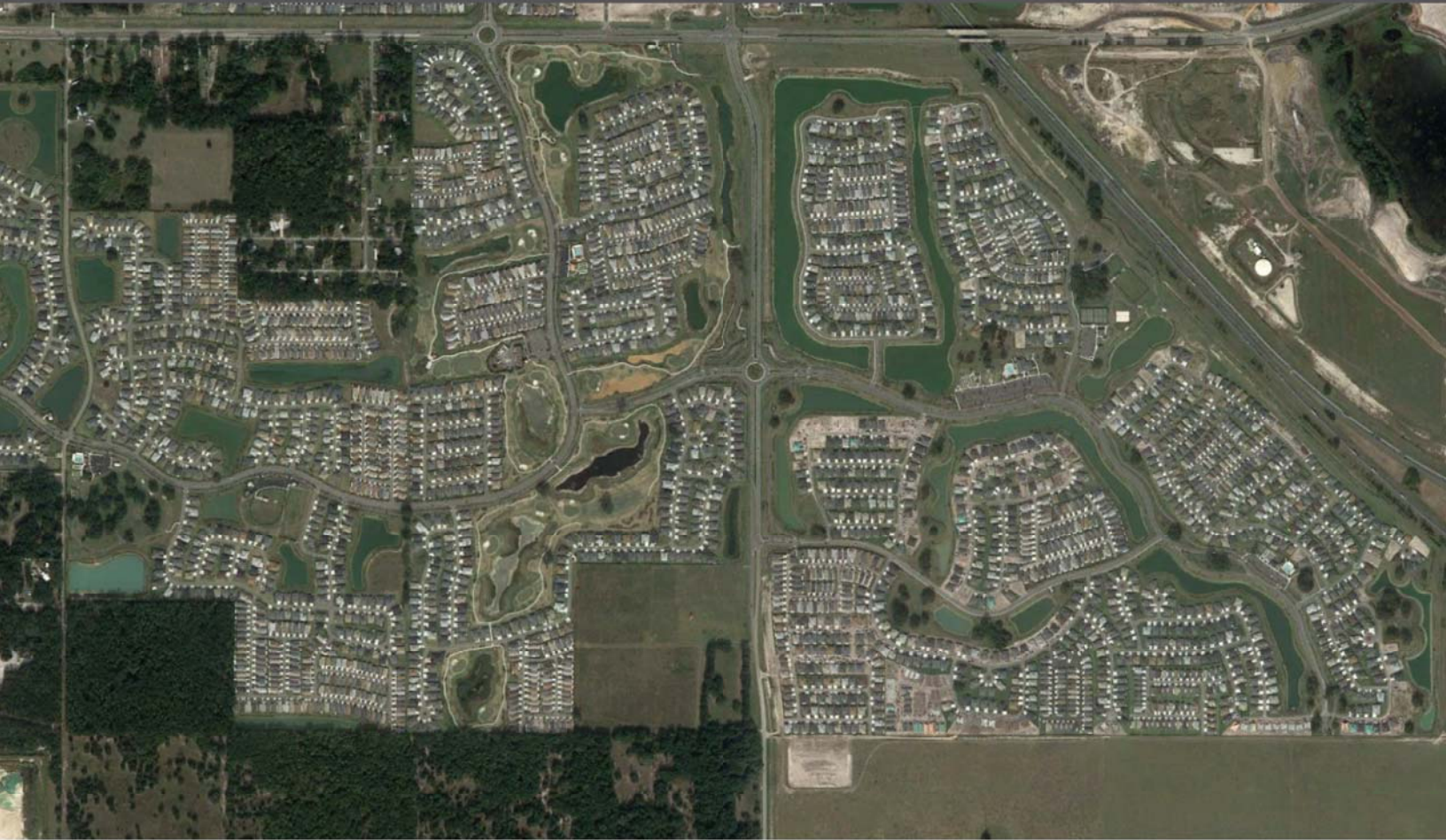
LEGAL DESCRIPTION: (BY SURVEYOR)
THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, AND THE EAST 35.57 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, LESS THE NORTH 208.71 FEET THEREOF, LESS THE NORTH 30 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, AND LESS ROAD RIGHT OF WAY, TOGETHER WITH THAT CERTAIN 1986 FLEXWOOD SINGLE WIDE MOBILE HOME, SERIAL NO. 31750995.
LESS AND EXCEPT:
COMMENCE AT THE SOUTH 1/4 CORNER OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, THENCE RUN S 89°48'04" E, ALONG THE SOUTH LINE OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, A DISTANCE OF 1,250.43 FEET; THENCE N 0°30'15" E, A DISTANCE OF 631.15 FEET FROM A POINT OF BEGINNING, THENCE CONTINUE N 0°30'15" E, A DISTANCE OF 487.10 FEET TO A POINT ON A LINE 206.71 FEET (1/2) SOUTH OF AND PARALLEL TO THE NORTH LINE OF SAID SECTION 33, THENCE S 89°44'40" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 35.57 FEET; THENCE N 0°30'15" E, A DISTANCE OF 178.71 FEET TO A POINT ON A LINE 30 FEET SOUTH AND PARALLEL TO SAID NORTH LINE OF SECTION 33, THENCE S 89°44'40" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 1,224.89 FEET TO THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD 501, THENCE S 0°27'25" W, ALONG SAID RIGHT-OF-WAY LINE, A DISTANCE OF 204.43 FEET TO A POINT OF CURVATURE ON A CURVE CONCAVE NORTHEASTERLY, HAVING A RADIUS OF 1,000.00 FEET, A CHORD BEARING OF S 0°42'28" E, A CHORD DISTANCE OF 442.94 FEET; THENCE RUN SOUTHEASTERLY ALONG THE ARC OF SAID CURVE, AND SAID WEST RIGHT-OF-WAY LINE, THROUGH A CENTRAL ANGLE OF 89°42', A DISTANCE OF 443.33 FEET; THENCE S 0°25'14" E, ALONG SAID WEST RIGHT-OF-WAY LINE, A DISTANCE OF 18.91 FEET; THENCE N 89°46'46" W, A DISTANCE OF 1,345.92 FEET TO THE POINT OF BEGINNING.
LESS AND EXCEPT:
A PORTION OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 2675, PAGE 100 OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, SAID LANDS LYING IN SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:
COMMENCE AT THE SOUTHEAST CORNER OF SAID SECTION 33, THENCE ALONG THE SOUTH LINE OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, THE FOLLOWING THREE (3) COURSES AND DISTANCES: 1) THENCE RUN NORTH 89°45'50" WEST, A DISTANCE OF 14.42 FEET TO A POINT ON THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD NO. 501 (A VARIABLE WIDTH RIGHT-OF-WAY PER BOARD OF COUNTY COMMISSIONERS RIGHT-OF-WAY MAP, DATED JANUARY 12, 1994); 2) THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 370.01 FEET TO THE POINT OF BEGINNING; 3) THENCE CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 977.04 FEET TO THE SOUTHEAST CORNER OF VILLAGES OF SOUTHERN OAKS VILLAS, AS RECORDED IN PLAT BOOK 11, PAGES 3 THROUGH 3A, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, THENCE DEPARTING SAID SOUTH LINE, RUN NORTH 0°32'32" EAST, ALONG THE EAST LINE OF SAID PLATTED LANDS, A DISTANCE OF 631.00 FEET TO THE SOUTHWEST CORNER OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 3270, PAGE 322, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, THENCE DEPARTING SAID EAST LINE, RUN SOUTH 89°44'31" EAST, ALONG THE SOUTH LINE OF SAID LANDS, A DISTANCE OF 1346.30 FEET TO A POINT ON THE AFORESAID WEST RIGHT-OF-WAY OF COUNTY ROAD NO. 501, THENCE DEPARTING SAID SOUTH LINE, RUN ALONG SAID WEST RIGHT-OF-WAY THE FOLLOWING TWO (2) COURSES AND DISTANCES: 1) THENCE RUN SOUTH 0°47'57" EAST, A DISTANCE OF 8.28 FEET; 2) THENCE RUN SOUTH 0°24'30" WEST, A DISTANCE OF 51.81 FEET; THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, RUN NORTH 89°44'31" WEST, A DISTANCE OF 370.01 FEET; THENCE RUN SOUTH 0°34'30" WEST, A DISTANCE OF 570.91 FEET TO THE POINT OF BEGINNING.

*SIC = SCHMIDT ERROR: LEGAL DESCRIPTION CALLS FOR A POINT 206.71 FEET, BUT IT SHOULD BE 208.71 FEET.

CHIN Professional Corporation 1000 N. US Highway 1 Alhambra, Florida 32815 www.chin-inc.com tel: 386-507-9776 fax: 386-507-9776	
DATE: 11-14-22 SHEET NO. 3 OF 3 PROJECT: THOMAS GROUP SUBJECT: THOMAS GROUP PLANNED DEVELOPMENT DRAWN BY: J. J. JONES CHECKED BY: J. J. JONES DATE: 11-14-22	
DATE: 11-14-22 SHEET NO. 3 OF 3 PROJECT: THOMAS GROUP SUBJECT: THOMAS GROUP PLANNED DEVELOPMENT DRAWN BY: J. J. JONES CHECKED BY: J. J. JONES DATE: 11-14-22	
DATE: 11-14-22 SHEET NO. 3 OF 3 PROJECT: THOMAS GROUP SUBJECT: THOMAS GROUP PLANNED DEVELOPMENT DRAWN BY: J. J. JONES CHECKED BY: J. J. JONES DATE: 11-14-22	

Traffic Impact Analysis

Wildwood Mini-Storage



Date: 12/05/2022
PN#: 22-0139
PM: Brian Snyder, PE

Prepared For: Better Homes and Gardens Real Estate - Thomas Group

Submitted To: Sumter County

CHW
11801 Research Drive
Alachua, FL 32615

www.chw-inc.com

CHW
Professional Consultants

CONTENTS

1.	Executive Summary.....	3
2.	Study Area.....	4
3.	Trip Generation	6
4.	Data Collection	7
5.	Trip Distribution	7
6.	Roadway Segment Level of Service Analysis	8
7.	Conclusions and Recommendations	11

List of Figures

- Figure 1: Study Area Roadway Segment

List of Tables

- Table 1: Trip Generation
- Table 2: Roadway Segment Level of Service Analysis

List of Appendices

- Appendix A: Site Concept
- Appendix B: Methodology Letter and Approval
- Appendix C: Trip Generation Documentation
- Appendix D: Peak Season Factor and Historical Growth Rate
- Appendix E: Committed Trips
- Appendix F: Roadway Segment Level of Service Analysis Documentation

1. EXECUTIVE SUMMARY

CHW has prepared this Traffic Impact Analysis (TIA) for the proposed mini-storage facility located on Marsh Bend Trail approximately 1 mile south of Warm Springs Avenue in Wildwood, Florida, as illustrated in **Figure 1**.

The site is anticipated to include approximately 110 KSF Mini-Storage. The full build-out of the site is anticipated in 2025. A shared access will be located along the north side of the property. The access will be shared with the Zora Development. The site concept is provided in **Appendix A**. This project requires a minor TIA based on the site generating between 50 and 1,000 ADT, in accordance with the Sumter County TIA Guidelines.

The purpose of this TIA is to:

- Determine if there are traffic related deficiencies created by the proposed project; and
- Provide mitigation strategies to correct any deficiencies.

The report is in conformance with the “*Sumter County Public Works Department Traffic Impact Analysis (TIA) Guidelines*” and the methodology letter dated October 24th, 2022, as provided in **Appendix B**.

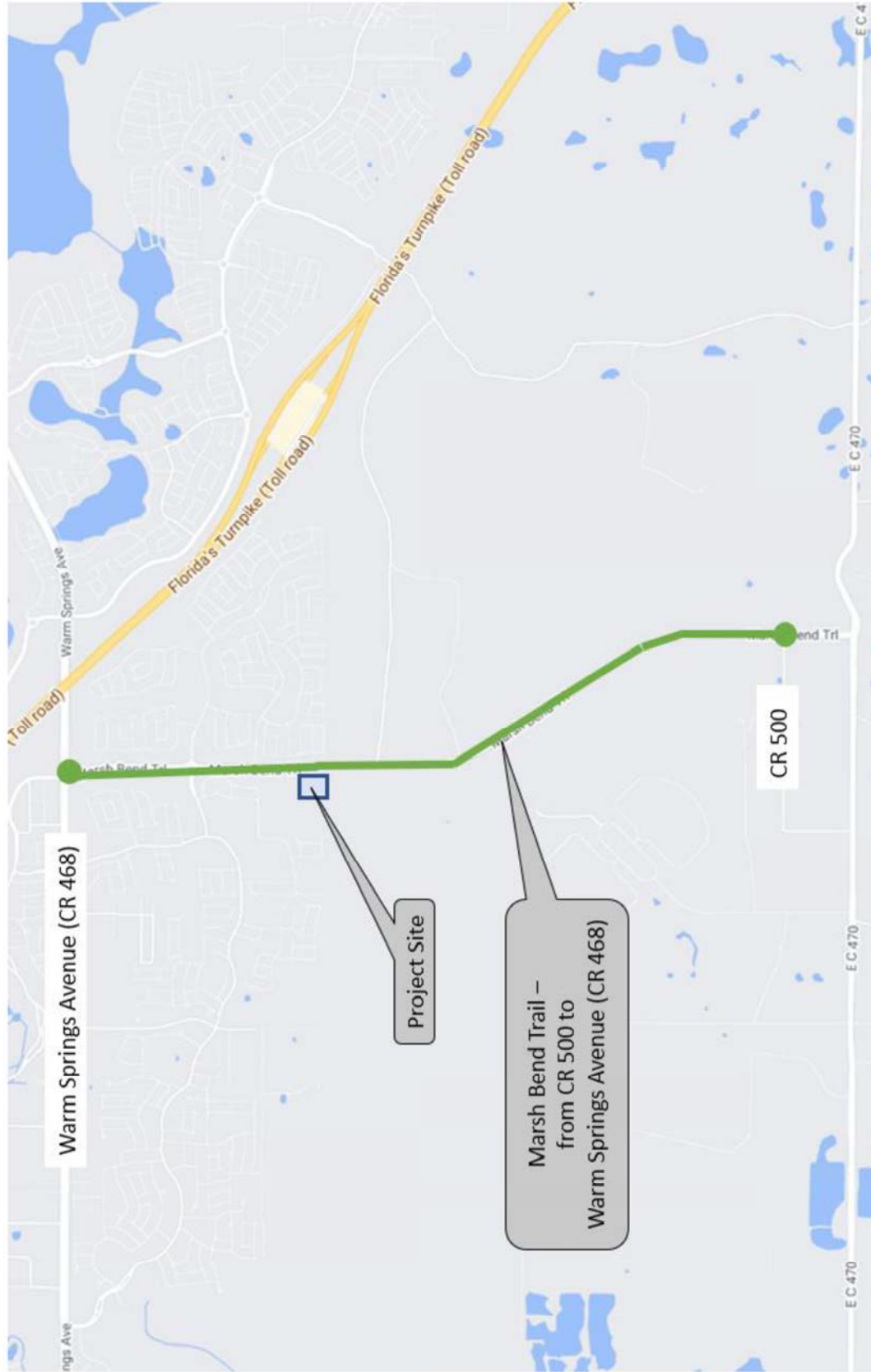
2. STUDY AREA

Based on the Sumter County TIA Guidelines, minor TIA's are required to include a roadway segment LOS analysis for the roadway segments that abut the development, therefore the following roadway segment will be analyzed, as illustrated in **Figure 1**:

- Marsh Bend Trail from CR 500 to CR 468

As approved in the TIA Methodology, no intersection analysis is required, due to the low volumes generated by this project.

Figure 1 | Study Area Roadway Segment



3. TRIP GENERATION

The trip generation for the site is based on the Institute of Transportation Engineer's (ITE) Trip Generation Manual, 11th Edition. The estimated trip generation is provided below in **Table 1**. The trip generation documentation is provided in **Appendix C**.

Table 1: Trip Generation									
Land Use	ITE LU Code	Variable KSF	Daily	AM Peak			PM Peak		
				Total	In	Out	Total	In	Out
Mini-Warehouse	151	110.000	160	10	6	4	17	8	9

4. DATA COLLECTION

A peak season factor and historical growth rate was derived from FDOT Traffic Online data and applied to the count data to derive the 2025 background turning movement volumes. Based on the historical data, the growth rate along Marsh Bend Trail (CR 501) is 40.48% annually, the historical growth rate calculation is provided in **Appendix D**.

Committed trips from Zora Development were added to the background trips, where applicable, as provided in **Appendix E**.

5. TRIP DISTRIBUTION

The road segment was analyzed based on project trip distribution of 75% to/from the north and 25% to/from the south on Marsh Bend Trail. This trip distribution is based on more attractions and development located in The Villages to the north, compared to south on Marsh Bend Trail.

6. ROADWAY SEGMENT LEVEL OF SERVICE ANALYSIS

The roadway segment analysis was completed for the roadway segment within the study area. Growth rates were determined based on historical ADT derived from FDOT Traffic Online, to derive the 2025 background volumes for the Marsh Bend Trail Segment.

The Methodology stated that ADT volumes would be used for the roadway segment LOS Analysis. However, the ADT volume along this roadway segment, provided by FDOT Traffic online is located on the south end of Marsh Bend Trail, where traffic volumes are expected to be low. Therefore, this analysis instead is based on bi-directional PM Peak Hour volumes just south of Warm Springs Avenue where traffic volumes are expected to be the highest along this segment. The hourly bi-directional volumes were derived from the turning movement count at the Warm Springs Avenue/ Marsh Bend Trail intersection, provided in the Zora TIA.

Committed project trips were added to the background trips for all roadway segments, where applicable, as provided in **Appendix E**. Build-out project trips were added to the background trips and committed trips and applied to each roadway segment. The roadway segment LOS Analysis documentation is provided in **Appendix F**.

As indicated from Sumter County staff, the Marsh Bend Trail will be 4-laned along the segment from CR 500 to Warm Springs Avenue, therefore, the MSV was calculated based on 4-lane roadway.

Table 2 provides the results of the results of the roadway segment LOS analysis which indicates that the addition of project trips does not cause any roadway segments in the study area to exceed acceptable levels of operating service as the roadway segment already exceeded the acceptable level of operating service under the background condition. **Therefore, no roadway segment improvements are needed or recommended.**

The results from **Table 2** are based on historical growth rates. The high growth rate is due to the recent development that occurred along the portion of Marsh Bend Trail just south of Warm Springs Road. In actuality, the traffic volume growth along this road is not expected to continue at this rate, as the land available to be developed along Marsh Bend Trail is limited. Therefore, the capacity of Marsh Bend Trail may not be exceeded in 2025 or beyond.

Though capacity improvements are not the responsibility of the Wildwood Mini-Storage development, the following improvements are provided for Sumter County's consideration:

- 1) Increasing the speed limit of Marsh Bend Trail to increase the MSV.
- 2) Providing additional lanes along Marsh Bend Trail to increase the MSV.
- 3) Minimize the development or development access to Marsh Bend Trail. This project generates low volumes based on the size of the site.

Table 2 | Roadway Segment Level of Service Analysis

ROAD NAME	FROM	TO	Maintaining Agency	Jurisdiction	Functional Class	FDOT LOS Standard ²	Number of Lanes	State Road (Y/N)	Divided or Undivided	Posted Speed	Two-way Peak Hour MSV ¹	Two-way Peak Hour Volumes (Peak Season) ²	Growth Rate ³	2025 Growth Factor	2025 Background Trips	Committed Trips ⁴	2025 Background plus Committed Trips	2025 Background plus Committed v/c	Project Trip Dist %	Net New Total Project Trips	2025 Build-out Trips	2025 Build-out v/c
CR 501	CR 500	CR 468	COUNTY	WILDWOOD	COLLECTOR	D	4	N	DIVIDED	35	2,628	939	40.48%	3.024	2,840	59	2,899	1.10	75%	13	2,912	1.11

(1) Based on FDOT LOS Tables, see Appendix F

(2) Calculated from 2020 turning movement count from the Zora T/A, see Appendix F.

(3) Based on historical ADT from FDOT traffic online, see Appendix D.

(4) Calculated from 2020 turning movement count from the Zora T/A, see Appendix E.

7. CONCLUSIONS AND RECOMMENDATIONS

This study's roadway segment LOS analysis indicates that the added project trips does not cause deficiencies to Marsh Bend Trail, therefore, no transportation improvements are recommended to support the project traffic.

Appendix A

Site Concept

Appendix B

Methodology Letter and Approval

October 24, 2022

Steven Cohoon
Assistant Director – Public Works Planning and Design
319 E. Anderson Ave.
Bushnell, FL 33513

Re: Traffic Impact Analysis Methodology, Wildwood Mini-Storage, Wildwood, FL

Dear Steven,

CHW is preparing a Traffic Impact Analysis (TIA) for a proposed mini-storage facility located on CR 501 (Marsh Bend Trail) approximately (1) mile south of Warm Springs Avenue in Wildwood, Florida. A site location map is provided in **Attachment A**.

This site proposes approximately 110 KSF Mini-Storage.

According to the *Sumpter County Public Works Department Traffic Impact Analysis (TIA) Guidelines*, this site requires a Minor TIA based on generating more than 50 but less than 1,000 ADT.

Please review the methodology and either provide comment for the purposes of modification/clarification or provide acceptance.

Study Area

The study area will include the roadway segment which abuts the development, CR 501 from CR 500 to CR 468, in accordance with the *Sumpter County Public Works Department Traffic Impact Analysis (TIA) Guidelines*.

As shown in the Trip Generation section, the trips generated by this project are very low, with only 10 AM peak hour trips and 17 PM peak hour trips and is expected to have a negligible impact to the adjacent intersections. For that reason, an intersection analysis is not being proposed with the TIA.

Land Use and Trip Generation

The trip generation for the site is based on the Institute of Transportation Engineer's (ITE) Trip Generation Manual, 11th Edition. The estimated trip generation is provided below.

Table 1: Trip Generation									
Land Use	ITE LU Code	Variable DU	Daily	AM Peak			PM Peak		
				Total	In	Out	Total	In	Out
Mini-Warehouse	151	110.000	160	10	6	4	17	8	9

Background Traffic Volumes

A peak season factor and historical growth rate will be derived from FDOT Traffic Online data and applied to the count data to derive the background turning movement volumes for the anticipated 2024 site build-out. A minimum 1% growth rate will be applied if the historical growth rate is less than 1%.

Trip Distribution

The road segment will be analyzed based on project trip distribution of 75% to/from the north and 25% to/from the south on CR 501. This trip distribution is based on more attractions and development located in The Villages to the north, compared to south on CR 501.

Analysis

The analysis will be performed at the intersections and segments provided in the study area under the following scenarios, in accordance with the Sumter County TIA guidelines:

- Existing (peak season) scenario
- Future scenario
- Base scenario
- Future scenario with mitigation, if applicable

FDOT Traffic Online provides historical AADT data along this road segment but does not provide hourly volumes. Therefore, the road segment LOS analysis will be based on daily volumes.

Any needed roadway modifications based on this analysis will be identified and modeled to demonstrate that the improvement mitigates the deficiency.

Report

A draft report, including the following at a minimum, will be submitted for review and comment.

- Study Area Map
- Trip Generation
- Background Traffic Volumes
- Trip Distribution
- Analysis
 - Roadway Segment LOS Analysis
- Conclusion and Recommendations
- Appendices with Supporting Documentation

Following any revisions, based upon staff comments, we will prepare a final signed and sealed report.

If your office agrees with the methodology provided, please provide concurrence.

Thank you for your review and consideration.

Sincerely,
CHW



Brian Snyder, P.E.
Project Manager

N:\2022\22-0139\Departments\04_Engineering\04_Traffic\Report\Methodology\LETTER 221024_ Wildwood Methodology.docx

Attachment A: Site Location

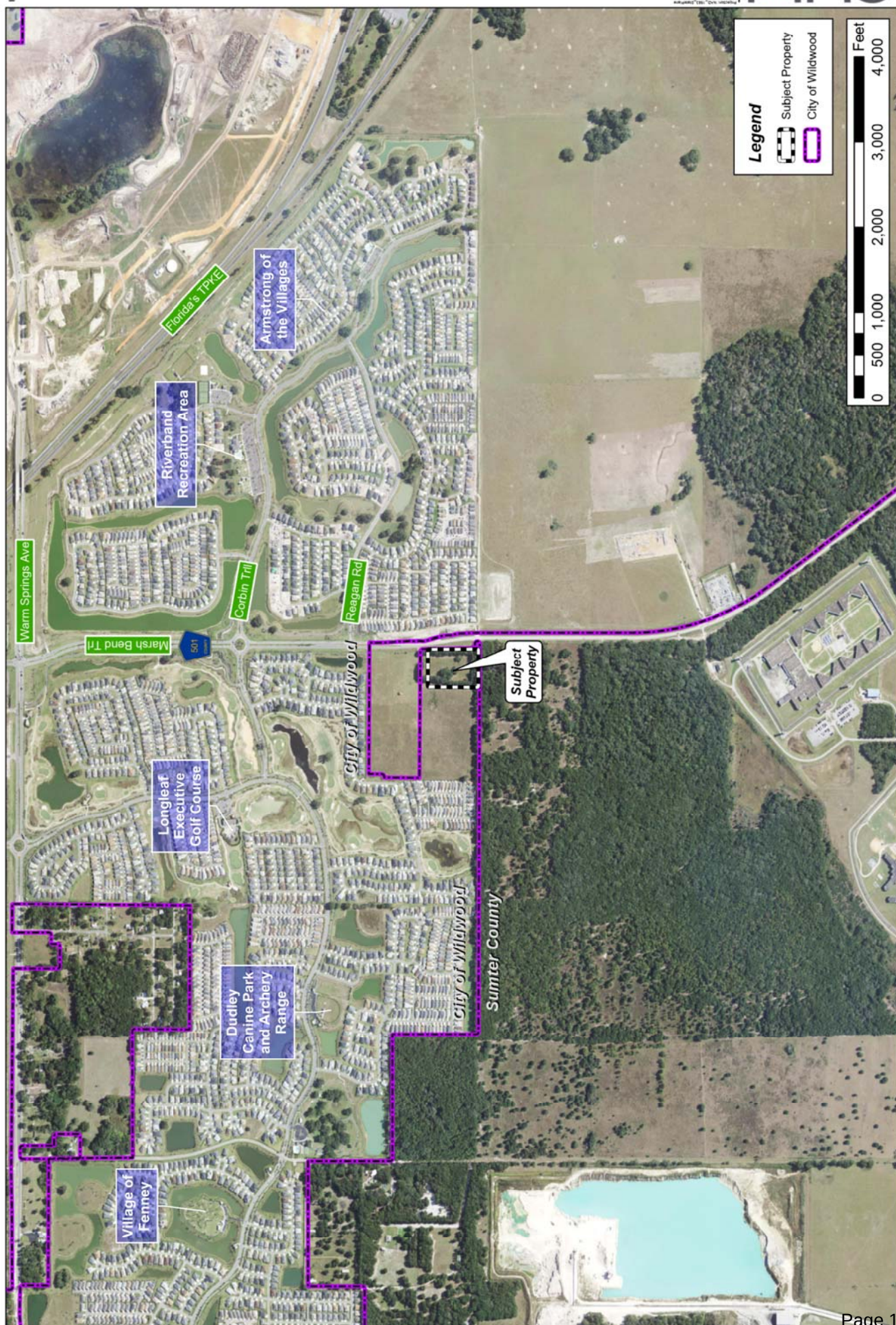
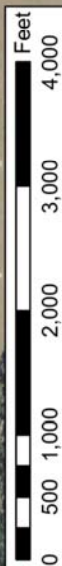


Prepared by: Employees
Date: 5/20/2022
Map Scale: 1" = 1,000'
Map Date: 5/20/2022
Map Author: J. Smith
Map Reviewer: J. Smith
Map Project: Due Diligence
Map Title: Sumter County Tax Parcel # G33-154



Legend

-  Subject Property
-  City of Wildwood



Brian Snyder

From: Cohoon, Steven <Steven.Cohoon@sumtercountyfl.gov>
Sent: Tuesday, November 22, 2022 8:32 AM
To: Brian Snyder
Cc: Adibfar, Hootan; Snyder, Deborah; Terri O'Neal; sraja@wildwood-fl.gov; mpeavy@wildwood-fl.gov
Subject: RE: Online Form Submittal: Sumter County Traffic Impact Analysis (TIA)

Great! Please use the below link to download the accepted TIA.

<https://www.dropbox.com/t/OQJchfk4utgDULYC>

Sincerely,

Steven Cohoon
Assistant Director – Planning and Design
Public Works
Board of Sumter County Commissioners
Tel: 352-689-4400
Fax: 352-689-4401
www.sumtercountyfl.gov

From: Brian Snyder <brians@chw-inc.com>
Sent: Monday, November 21, 2022 4:24 PM
To: Cohoon, Steven <Steven.Cohoon@sumtercountyfl.gov>
Cc: Adibfar, Hootan <Hootan.Adibfar@sumtercountyfl.gov>; Snyder, Deborah <Deborah.Snyder@sumtercountyfl.gov>; Terri O'Neal <toneal@wildwood-fl.gov>; sraja@wildwood-fl.gov; mpeavy@wildwood-fl.gov
Subject: FW: Online Form Submittal: Sumter County Traffic Impact Analysis (TIA)

Steven,

Please see response to comments below in red. We are moving forward with the analysis based on the comments received.

Do you have available the Zora Development traffic study to send us, so that we can include the committed trips?

Thank you,

BRIAN SNYDER, PE | Project Manager
d: (386) 518-5154 | c: (352) 339-2938
e: brians@chw-inc.com
w: www.chw-inc.com



JACKSONVILLE.GAINESVILLE.OCALA
t: (904) 619-6521 | 8563 Argyle Business Loop, Suite 3, Jacksonville, FL 32244
t: (352) 331-1976 | 11801 Research Drive, Alachua, FL 32615
t: (352) 414-4621 | 2100 SE 17th Street, Unit 802, Ocala, FL 34471

From: Sherry Stinson <sherrys@chw-inc.com>
Sent: Tuesday, November 15, 2022 9:11 AM
To: Brian Snyder <brians@chw-inc.com>
Subject: FW: Online Form Submittal: Sumter County Traffic Impact Analysis (TIA)

Thank you,

SHERRY STINSON | Project Assistant

d: (386) 518-5114 | **c:** (352) 262-9477

e: sherrys@chw-inc.com

w: www.chw-inc.com



JACKSONVILLE.GAINESVILLE.OCALA

t: (904) 619-6521 | 8465 Merchants Way, Suite 102, Jacksonville, FL 32222

t: (352) 331-1976 | 11801 Research Drive, Alachua, FL 32615

t: (352) 414-4621 | 2100 SE 17th Street, Unit 802, Ocala, FL 34471

PLANNING.DESIGN.SURVEYING.ENGINEERING.CONSTRUCTION.

From: Cohoon, Steven <Steven.Cohoon@sumtercountyfl.gov>
Sent: Wednesday, November 9, 2022 1:34 PM
To: Sherry Stinson <sherrys@chw-inc.com>
Cc: Adibfar, Hootan <Hootan.Adibfar@sumtercountyfl.gov>; Snyder, Deborah <Deborah.Snyder@sumtercountyfl.gov>; toneal@wildwood-fl.gov; sraja@wildwood-fl.gov; mpeavy@wildwood-fl.gov
Subject: RE: Online Form Submittal: Sumter County Traffic Impact Analysis (TIA)

Sherry,

Please see below comments.

- Please note the buildout will need to be at least 2 years from the date of TIA acceptance. If the TIA is not accepted before 2023, this will need to be updated to 2025 or later. **The TIA will use a build-out year of 2025 as suggested.**
- Replace all references to CR 501 with Marsh Bend Trail **The study will use the road name Marsh Bend Trail and not CR 501.**
- What is the proposed site access as it relates to the Zora Development access? I believe the development is required connect to the Zora drive as a condition of the lot split (provide documentation if this is not the case). **The project will connect to a shared access with the Zora Development.** Also, all driveways west of the Marsh Bend Trail in this area will be restricted to a right-in/right-out in the coming months. Northbound movements will be required to go south to the future McNeill Roundabout to travel north. **Acknowledged.**
- Committed Improvements:
 - Marsh Bend Trail conversion from a undivided two lane to a divided four lane. **Marsh Bend Trail will be modeled as a divided four lane roadway under the background and build-out conditions.**
- Vested Trips:
 - Zora Development. **The Zora Development vested trips will be included in the background and build-out conditions.**

Sincerely,

Steven Cohoon
Assistant Director – Planning and Design
Public Works
Board of Sumter County Commissioners
Tel: 352-689-4400
Fax: 352-689-4401
www.sumtercountyfl.gov

From: noreply@civicplus.com <noreply@civicplus.com>

Sent: Monday, October 24, 2022 11:20 AM

To: Cohoon, Steven <Steven.Cohoon@sumtercountyfl.gov>; @Administrative Services (Wildwood) <administrative.services@sumtercountyfl.gov>; Adibfar, Hootan <Hootan.Adibfar@sumtercountyfl.gov>; Snyder, Deborah <Deborah.Snyder@sumtercountyfl.gov>; toneal@wildwood-fl.gov; sraja@wildwood-fl.gov; mpeavy@wildwood-fl.gov

Subject: Online Form Submittal: Sumter County Traffic Impact Analysis (TIA)

Sumter County Traffic Impact Analysis (TIA)

First Name	Sherry
Last Name	Stinson
Email Address	sherrys@chw-inc.com
Address	11801 Research Drive
City	Alachua
State	FL
Zip Code	32615
Phone	13865185114
Alt Phone	3523311976

Sumter County Traffic Impact Analysis (TIA)

In accordance with the Interlocal Service Boundary and Joint Planning Agreement between the City of Bushnell, City of Center Hill, City of Coleman, City of Webster, and the City of Wildwood, within the municipal service area, the Cities and County agree that County will review all traffic impact studies for development accessing the City or County road networks.

Purpose and Applicability

The purpose of the TIA is to identify the potential traffic impacts of new development on the transportation system and to develop mitigation strategies to offset those impacts according to the methodologies and provisions as described herein. These guidelines apply to all new development within Sumter County, including its municipalities, submitting building and site plans for review. The TIA requirement applies to previously approved developments that are over five years old, changing land uses within the site plan, or extending the build-out date from a previously approved TIA. Unless otherwise required by the County Administrator or designee, a TIA, as it relates to a substandard roadway section, shall not be required for any single development generating less than 50 average daily trips, as per the Trip Generation Manual, latest edition, as published by the Institute of Transportation Engineers (ITE). The following thresholds will determine the level of study that will need to be performed depending on the number of trips a development produces:

Applicants proposing developments that generate 50 but less than or equal to 1,000 average daily trips (ADT), according to the ITE Trip Generation Manual, current edition, must perform a Minor TIA.

A Major TIA shall be required for all proposed developments generating more than 1,000 ADT, as per the ITE Trip Generation Manual, current edition..

For purposes of this section, a "single development" shall include any development, parcel of land, lot, and tract, and contiguous or nearby developments, parcels, lots, or tracts that are:

Developed by the same or a related development or landowner;

Developed as part of the same zoning plan, preliminary plan, preliminary site plan, plat, or other unified or common plan of development.

These guidelines are in addition to the requirements of the access management regulations. In the event of any conflict between these guidelines and such regulations, the more stringent requirements shall apply.

Methodology Statement

Before conducting a Major TIA, a methodology statement shall be prepared by the applicant, the applicant's representative, or the applicant's engineer/consultant and submitted for review and approval by the County. Before conducting a Minor TIA, the applicant, the applicant's representative, or the applicant's engineer/consultant shall seek confirmation from County staff on the need for a methodology statement. The purpose of the methodology statement is to establish agreed-upon methodologies and assumptions before the start of the TIA. A methodology statement shall be prepared using the guidelines provided in the following paragraphs. The methodology statement will be first reviewed by County staff, if necessary, through a methodology meeting with the applicant and or the applicant's consultant. The applicant's

consultant will then revise the statement based upon agreed-upon methodologies. The applicant shall ensure the consultant does not prepare a TIA without a methodology statement approved by the appropriate County representative.

Sumter County 2022 County Annual Traffic Reports Summary Table	Click here to view the table.
Exemption	<i>Field not completed.</i>
Please submit your Methodology Statement	LETTER 221024 Wildwood Mini-Storage TIA Methodology.pdf
Please submit your TIA	<i>Field not completed.</i>
Date of Methodology Acceptance by County	<i>Field not completed.</i>
Applicable Jurisdiction	City of Wildwood
Link	FDOT Systems Implementation Office
Link	FDOT Roadway Design - Florida Greenbook
Link	Lake-Sumter MPO
Link	FDOT Traffic Information

Email not displaying correctly? [View it in your browser.](#)

Disclaimer

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorized to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

This email has been scanned for viruses and malware, and may have been automatically archived by Mimecast, a leader in email security and cyber resilience. Mimecast integrates email defenses with brand protection, security awareness training, web security, compliance and other essential capabilities. Mimecast helps protect large and small organizations from malicious activity, human error and technology failure; and to lead the movement toward building a more resilient world. To find out more, visit our website.

Disclaimer

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorized to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

This email has been scanned for viruses and malware, and may have been automatically archived by Mimecast, a leader in email security and cyber resilience. Mimecast integrates email defenses with brand protection, security awareness training, web security, compliance and other essential capabilities. Mimecast helps protect large and small organizations from malicious activity, human error and technology failure; and to lead the movement toward building a more resilient world. To find out more, visit our website.

Appendix C

Trip Generation

Documentation

Land Use: 151

Mini-Warehouse

Description

A mini-warehouse is a building in which a number of storage units or vaults are rented for the storage of goods. They are typically referred to as “self-storage” facilities. Each unit is physically separated from other units, and access is usually provided through an overhead door or other common access point.

Additional Data

The technical appendices provide supporting information on time-of-day distributions for this land use. The appendices can be accessed through either the ITETripGen web app or the trip generation resource page on the ITE website (<https://www.ite.org/technical-resources/topics/trip-and-parking-generation/>).

The sites were surveyed in the 1980s, the 1990s, the 2000s, and the 2010s in California, Colorado, Massachusetts, Minnesota, Nevada, New Jersey, Texas, and Utah.

Source Numbers

212, 403, 551, 568, 642, 708, 724, 850, 868, 876, 1024, 1035

Mini-Warehouse (151)

Vehicle Trip Ends vs: 1000 Sq. Ft. GFA
On a: Weekday

Setting/Location: General Urban/Suburban

Number of Studies: 16

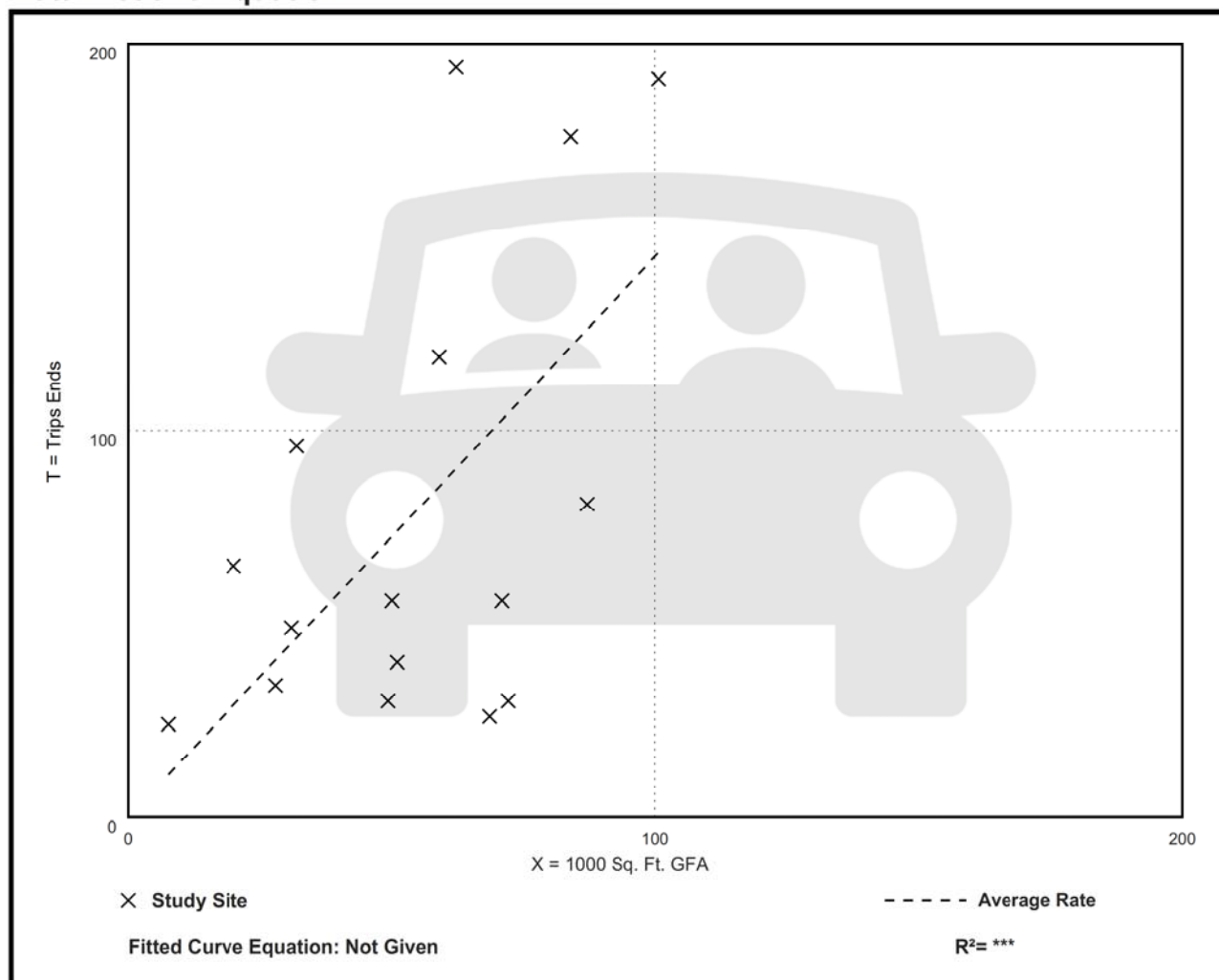
Avg. 1000 Sq. Ft. GFA: 55

Directional Distribution: 50% entering, 50% exiting

Vehicle Trip Generation per 1000 Sq. Ft. GFA

Average Rate	Range of Rates	Standard Deviation
1.45	0.38 - 3.25	0.92

Data Plot and Equation



Mini-Warehouse (151)

Vehicle Trip Ends vs: 1000 Sq. Ft. GFA

On a: Weekday,

Peak Hour of Adjacent Street Traffic,

One Hour Between 7 and 9 a.m.

Setting/Location: General Urban/Suburban

Number of Studies: 13

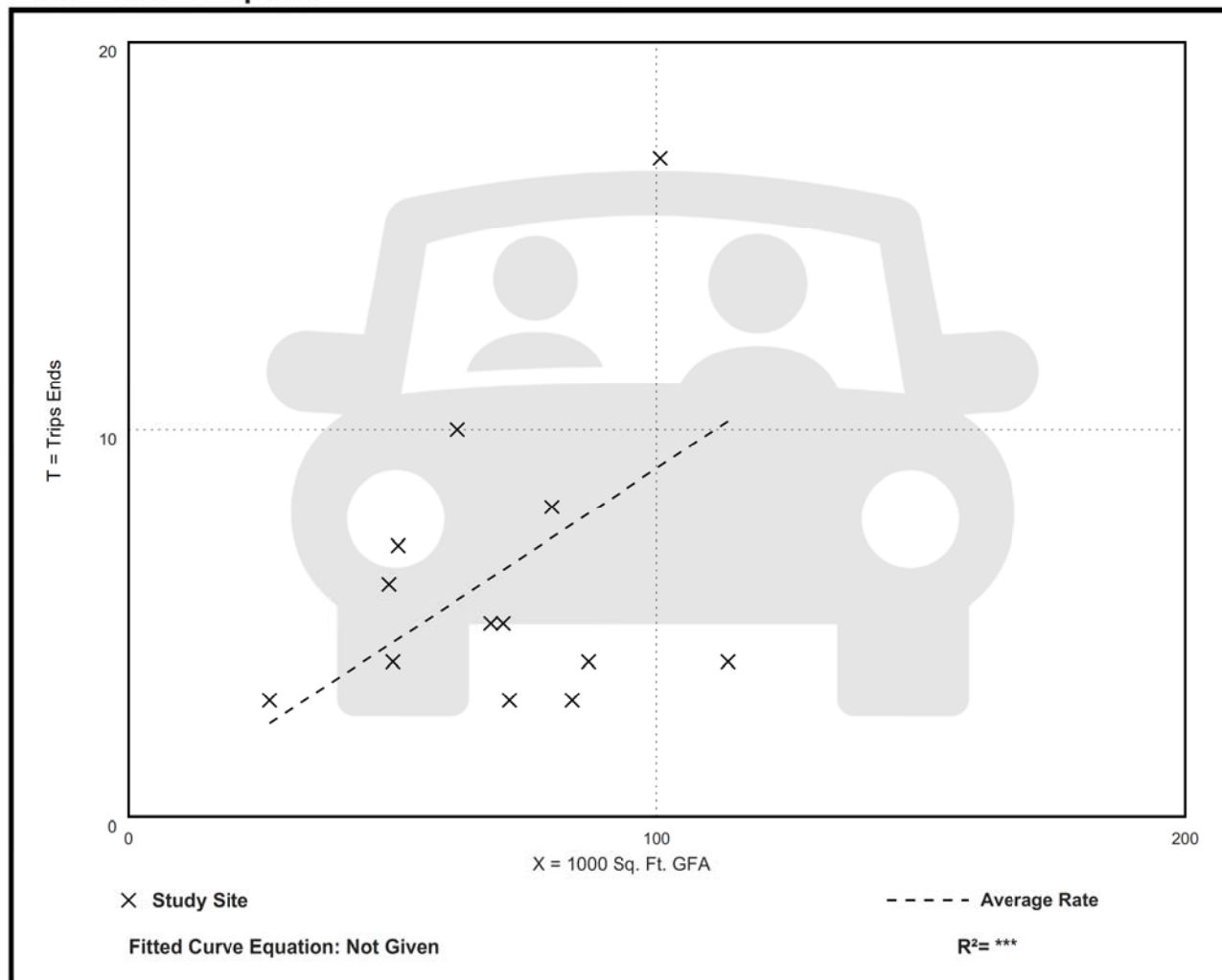
Avg. 1000 Sq. Ft. GFA: 70

Directional Distribution: 59% entering, 41% exiting

Vehicle Trip Generation per 1000 Sq. Ft. GFA

Average Rate	Range of Rates	Standard Deviation
0.09	0.04 - 0.17	0.05

Data Plot and Equation



Mini-Warehouse (151)

Vehicle Trip Ends vs: 1000 Sq. Ft. GFA

On a: Weekday,

Peak Hour of Adjacent Street Traffic,

One Hour Between 4 and 6 p.m.

Setting/Location: General Urban/Suburban

Number of Studies: 18

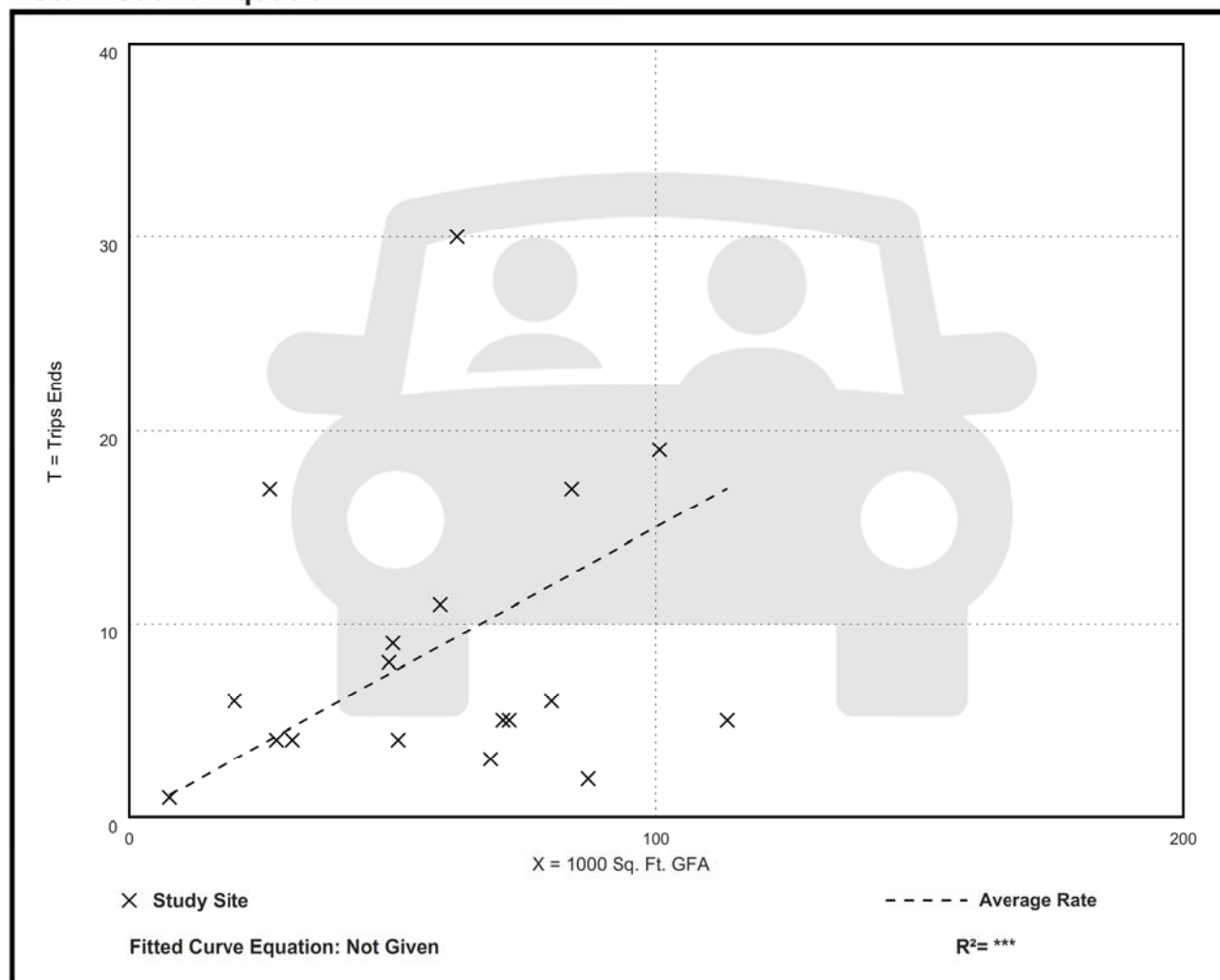
Avg. 1000 Sq. Ft. GFA: 59

Directional Distribution: 47% entering, 53% exiting

Vehicle Trip Generation per 1000 Sq. Ft. GFA

Average Rate	Range of Rates	Standard Deviation
0.15	0.02 - 0.64	0.14

Data Plot and Equation



Appendix D

Peak Season Factor and Historical Growth Rate

2021 PEAK SEASON FACTOR CATEGORY REPORT - REPORT TYPE: ALL
 CATEGORY: 1800 SUMTER COUNTYWIDE

WEEK	DATES	SF	MOCF: 0.95 PSCF
1	01/01/2021 - 01/02/2021	0.95	1.00
2	01/03/2021 - 01/09/2021	1.05	1.11
3	01/10/2021 - 01/16/2021	1.15	1.21
4	01/17/2021 - 01/23/2021	1.14	1.20
5	01/24/2021 - 01/30/2021	1.13	1.19
6	01/31/2021 - 02/06/2021	1.12	1.18
7	02/07/2021 - 02/13/2021	1.12	1.18
8	02/14/2021 - 02/20/2021	1.11	1.17
9	02/21/2021 - 02/27/2021	1.07	1.13
10	02/28/2021 - 03/06/2021	1.03	1.08
11	03/07/2021 - 03/13/2021	0.99	1.04
12	03/14/2021 - 03/20/2021	0.95	1.00
13	03/21/2021 - 03/27/2021	0.95	1.00
14	03/28/2021 - 04/03/2021	0.95	1.00
15	04/04/2021 - 04/10/2021	0.95	1.00
16	04/11/2021 - 04/17/2021	0.95	1.00
*17	04/18/2021 - 04/24/2021	0.95	1.00
*18	04/25/2021 - 05/01/2021	0.96	1.01
*19	05/02/2021 - 05/08/2021	0.97	1.02
*20	05/09/2021 - 05/15/2021	0.97	1.02
*21	05/16/2021 - 05/22/2021	0.96	1.01
*22	05/23/2021 - 05/29/2021	0.95	1.00
*23	05/30/2021 - 06/05/2021	0.95	1.00
*24	06/06/2021 - 06/12/2021	0.94	0.99
*25	06/13/2021 - 06/19/2021	0.93	0.98
*26	06/20/2021 - 06/26/2021	0.93	0.98
*27	06/27/2021 - 07/03/2021	0.94	0.99
*28	07/04/2021 - 07/10/2021	0.94	0.99
*29	07/11/2021 - 07/17/2021	0.95	1.00
30	07/18/2021 - 07/24/2021	0.98	1.03
31	07/25/2021 - 07/31/2021	1.01	1.06
32	08/01/2021 - 08/07/2021	1.04	1.09
33	08/08/2021 - 08/14/2021	1.07	1.13
34	08/15/2021 - 08/21/2021	1.10	1.16
35	08/22/2021 - 08/28/2021	1.10	1.16
36	08/29/2021 - 09/04/2021	1.10	1.16
37	09/05/2021 - 09/11/2021	1.10	1.16
38	09/12/2021 - 09/18/2021	1.10	1.16
39	09/19/2021 - 09/25/2021	1.07	1.13
40	09/26/2021 - 10/02/2021	1.05	1.11
41	10/03/2021 - 10/09/2021	1.03	1.08
42	10/10/2021 - 10/16/2021	1.01	1.06
43	10/17/2021 - 10/23/2021	0.99	1.04
44	10/24/2021 - 10/30/2021	0.98	1.03
45	10/31/2021 - 11/06/2021	0.96	1.01
46	11/07/2021 - 11/13/2021	0.95	1.00
47	11/14/2021 - 11/20/2021	0.93	0.98
48	11/21/2021 - 11/27/2021	0.94	0.99
49	11/28/2021 - 12/04/2021	0.94	0.99
50	12/05/2021 - 12/11/2021	0.95	1.00
51	12/12/2021 - 12/18/2021	0.95	1.00
52	12/19/2021 - 12/25/2021	1.05	1.11
53	12/26/2021 - 12/31/2021	1.15	1.21

* PEAK SEASON

08-MAR-2022 12:36:27

830UPD

5_1800_PKSEASON.TXT

FLORIDA DEPARTMENT OF TRANSPORTATION
TRANSPORTATION STATISTICS OFFICE
2021 HISTORICAL AADT REPORT

COUNTY: 18 - SUMTER

SITE: 8030 - CR 501 1000' N OF CR 470 - OFF SYSTEM

YEAR	AADT	DIRECTION 1	DIRECTION 2	*K FACTOR	D FACTOR	T FACTOR
----	-----	-----	-----	-----	-----	-----
2021	4600 S	N 2300	S 2300	9.50	53.00	17.70
2020	4400 F	N 2200	S 2200	9.50	54.70	20.20
2019	4600 C	N 2300	S 2300	9.50	53.30	22.00
2018	1950 R	N 1000	S 950	9.00	53.70	20.00
2017	1950 T	N 1000	S 950	9.00	53.50	20.10
2016	1850 S	N 950	S 900	9.00	53.10	20.90
2015	1750 F	N 900	S 850	9.00	54.70	20.70
2014	1650 C	N 850	S 800	9.00	55.10	19.80

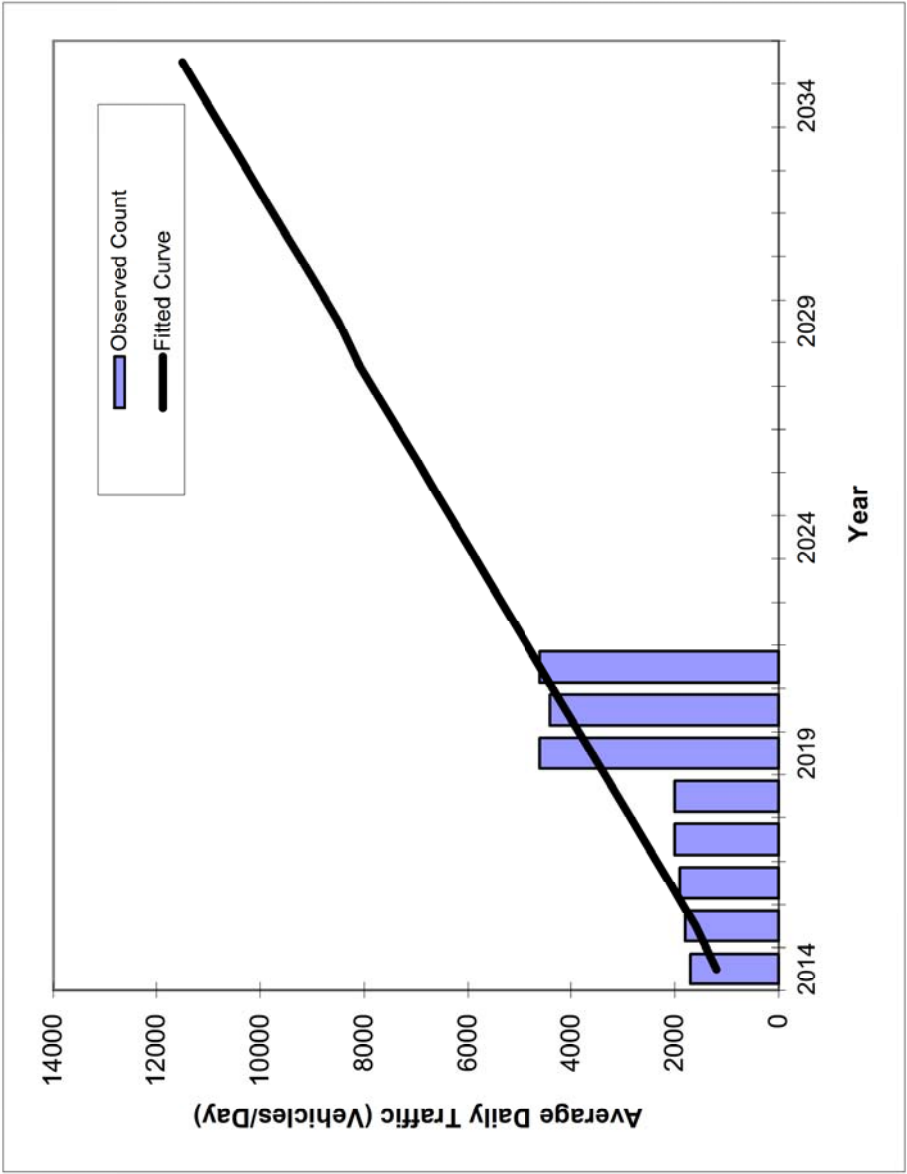
AADT FLAGS: C = COMPUTED; E = MANUAL ESTIMATE; F = FIRST YEAR ESTIMATE
S = SECOND YEAR ESTIMATE; T = THIRD YEAR ESTIMATE; R = FOURTH YEAR ESTIMATE
V = FIFTH YEAR ESTIMATE; 6 = SIXTH YEAR ESTIMATE; X = UNKNOWN
*K FACTOR: STARTING WITH YEAR 2011 IS STANDARDK, PRIOR YEARS ARE K30 VALUES

Traffic Trends - V03.a

CR 501 --

FIN#	1234
Location	1

County:	Alachua (26)
Station #:	8030
Highway:	CR 501



Year	Traffic (ADT/AADT)	
	Count*	Trend**
2014	1700	1200
2015	1800	1600
2016	1900	2100
2017	2000	2600
2018	2000	3100
2019	4600	3600
2020	4400	4100
2021	4600	4600
2022 Opening Year Trend		
2022	N/A	5100
2023 Mid-Year Trend		
2023	N/A	5600
2024 Design Year Trend		
2024	N/A	6100
TRANPLAN Forecasts/Trends		

*Axle-Adjusted

**** Annual Trend Increase:** 493
Trend R-squared: 76.74%
Trend Annual Historic Growth Rate: 40.48%
Trend Growth Rate (2021 to Design Year): 10.87%
Printed: 25-Oct-22

Straight Line Growth Option

Appendix E

Committed Trips

Traffic Impact Study
Zora -Wildwood Residential Development

Table 1 Historical AADT and Annual Growth Rates

Roadway	From	to	2016	2017	2018	2019	2017	2018	2019	Avg Growth rate	Applied Growth rate
C.R. 501	C-470E	WARM SPRINGS AVE	3,021	4,070	5,440	6,291	34.7%	33.7%	15.6%	28.0%	28.0%
Warm Springs Ave	C.R. 501	SR 91/FLORIDAS TURNPIKE	2,703	5,143	9,663	9,844	90.3%	87.9%	1.9%	60.0%	60.0%
Warm Springs Ave	US 301/SR 35	C.R. 501	3,587	5,971	8,991	10,996	66.5%	50.6%	22.3%	46.4%	46.4%

Source: FDOT Florida Traffic Online 2015 - 2019

These growth rates were applied to the 2020 Existing Traffic Volumes to develop the 2022 Projected Traffic Volumes, which are depicted on **Exhibit 2** in **Appendix D**.

Trip Generation

The applicant is proposing to develop the site with the following land uses generating site traffic:

- 14.66 Acres Residential Area with 130 housing units.

Comparable land uses for the proposed development as per the Institute of Transportation Engineers (ITE) *Trip Generation Manual, 10th Edition* were used to determine the number of trips generated the proposed development. The comparable land uses are listed below:

- Single Family (Land Use 210).
- Multi Family (Land Use 220).

There are no Pass-by trips for this development. **Table 2** displays the trip generation for the proposed development and includes the morning and evening peak hour.

Table 2. Site Trip Generation

Description ⁽¹⁾	Time	Total Trips ⁽¹⁾		
		In	Out	Total
Single Family (LU 210) 95 units	Daily	415	416	831
	AM	17	50	67
	PM	57	33	90
Multi family (LU 220) 70 Units	Daily	153	154	307
	AM	5	16	21
	PM	17	10	27
Total Trips	Daily	568	570	1,138
	AM	22	66	88
	PM	74	43	117

(1) Institute of Transportation Engineers Trip Generation (ITE), 10th Edition

(2) Pass-by Rates of 34% for (LU-820), 76% for (LU-960) & 36% For (LU-850) were extracted from the ITE Trip Generation Errata.

$$117 \times 50\% = 59$$

The proposed development is expected to generate a total of 88 trips during the morning peak hour and 117 trips during the evening peak hour. During the morning peak hour 66 of these trips are expected to be outbound trips, while the remaining 22 trips are expected to be inbound trips. During the evening peak hour 74 trips are expected to be inbound trips and 43 to be outbound trips.

Trip Distribution

The trip distribution was developed based on review of the AADT information provided by the Lake-Sumter MPO Average Annual Daily Traffic 2019 online information. The regional trip distribution is presented in **Figure 5**.



Figure 5. Regional Trip Distribution

Capacity Analysis

The study intersections were analyzed for each scenario following the Highway Capacity Manual (HCM 6th edition) methodologies using the computer software package Synchro 10 with SimTraffic. The analysis uses capacity, Level of Service, and control delay as the criteria for the performance of the driveways.

Capacity, as defined by the HCM, is a measure of the maximum number of vehicles in an hour that can travel through an intersection or section of roadway under typical conditions. Level of Service (LOS) is a marker of the driving conditions and perception of drivers while traveling

Appendix F

Roadway Segment Level of Service Documentation

ORDINANCE NO. O2022-XX

AN ORDINANCE OF THE CITY OF WILDWOOD GRANTING A REQUEST FOR A PLANNED DEVELOPMENT PURSUANT TO SECTION 8.6 OF THE LAND DEVELOPMENT REGULATIONS FOR CERTAIN PROPERTY WITHIN THE CITY OF WILDWOOD, FLORIDA; OWNED BY THOMAS GROUP INVESTMENTS #1, LLC; PROVIDING FOR SEVERABILITY; PROVIDING FOR CODIFICATION; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the first Thomas Group Planned Development Agreement was filed with the City of Wildwood on or about December 5, 2022;

WHEREAS, it is the intent of the City Commission to promote more efficient uses of land, encourage compatible and harmonious development of contiguous lands, provide flexibility and variety to meet changing needs, and administer mixed use developments in conformance with the goals, objectives, and policies of the City's Comprehensive Plan;

WHEREAS, the City recognizes the Planned Development process as a suitable avenue for planning unique developments which may not meet the specific requirements set forth in the Land Development Regulations and Design District Standards, but still facilitate the objectives stated above;

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

The application filed by CHW on behalf of Thomas Group Investments #1, LLC, a Florida Limited Liability Company (hereinafter referred to as the "Developer"), for a Planned Development was heard by and before the City Commission, Wildwood, Florida on this [DAY] day of [MONTH] 2023. Based upon the verified application and supporting documents, analyses, maps, charts, other evidence and instruments, the advice, report and recommendations of the Project Review Committee and the testimony adduced, and evidence received at the Public Hearing by the Planning and Zoning Board on [MONTH DAY], 2023 and otherwise being fully advised, the City Commission does hereby find and determine as follows:

SECTION 1: GENERAL FINDINGS

- A. That the Thomas Group Planned Development Application (hereinafter referred to as the "Project") was duly and properly filed herein on December 5, 2022 by the Developer.
- B. That all fees required to be borne and paid by the Developer have been paid in accordance with the City of Wildwood Fee Schedule.

- C. That the Project was reviewed by the Project Review Committee and found to meet or exceed the minimum standards of the City's Comprehensive Plan, Land Development Regulations, Code of Ordinances, and all other applicable ordinances and regulations.
- D. That the Developer intends to develop a Project consisting of 4.86 acres, more or less, which is situated in Wildwood, Florida. This land is legally described in "Exhibit A" attached hereto.
- E. That the Developer has complied with the conceptual development plan provision as required by Section 8.4 of the Land Development Regulations (LDR).
- F. That the City has complied with the due notice requirements of subsection 8.2 (E) and (F) of the Land Development Regulations.

SECTION 2: FINDINGS REGARDING PLANNED DEVELOPMENT OVERLAY

- A. That the Developer has applied for a Planned Development of the lands described in "Exhibit A".
- B. That the zoning districts of the subject land described in "Exhibit A" is classified as "C-2" on the City of Wildwood Zoning Map.
- C. That the Project is consistent with both the City of Wildwood Comprehensive Plan, the intent and purpose of the City of Wildwood Land Development Regulations, and does promote the public health, safety, morals, welfare, and orderly growth of the City of Wildwood.
- D. That the City of Wildwood Land Development Regulations are consistent with the provisions of the "Planned Development Agreement" as hereinafter set forth in Section 3 of this Ordinance. With respect to any conflict between the Land Development Regulations and the "Planned Development Agreement", the provisions of the "Planned Development Agreement" shall govern. Unless specific conditions are included in the "Planned Development Agreement" waiving or replacing the terms and conditions of the Land Development Regulations, the terms and conditions of the most current Land Development Regulations shall prevail.
- E. This Ordinance shall become effective immediately upon its approval and adoption by the City Commission ("Effective Date").

SECTION 3: PLANNED DEVELOPMENT AGREEMENT: GENERAL PROVISIONS

- A. Development Concept. The Project shall be developed as a Planned Development substantially in accordance with this Ordinance. This Planned Development Agreement shall govern the development of the Project.
- B. Conceptual Development Plan. The Project includes a conceptual development plan pursuant to Section 8.4 of the Land Development Regulations. The conceptual development plan prepared by CHW dated December 5, 2022 and revised on [DAY MONTH], 2023 is incorporated into this Ordinance as "Exhibit B" ("Conceptual Development Plan") attached hereto. The conceptual development plan is substantially consistent with City of Wildwood Comprehensive Plan.
 - 1. The conceptual development plan illustrates general location of the following land uses:

- a. Multistory Indoor Storage Facility
- b. Stormwater Management Facility (SMF)
- c. Transportation systems and parking facilities
- d. Existing potable water and sanitary sewer locations

2. The conceptual development plan is conceptual in nature and may be affected or modified by final zoning approval and conditions, by floodplain management regulations, final wetland or protected species locations and jurisdictional boundaries, final engineering, permitting, surveys, conservation easements. If there are any inconsistencies between the written ordinance and the conceptual development plan, the written ordinance will supersede.

C. Development Program. The Project shall be developed in a single phase in accordance with the Conceptual Development Plan and this Section.

- 1) **TYPE OF DEVELOPMENT**. The Project is intended to consist of a commercial multistory indoor storage facility.

The following shall apply to the Project:

1. Land Use Breakdown. Acreages devoted to each land use within the Project shall be in accordance with the following table:

Land Use	Total (Acres)	Percentage of Total Site
<u>Development Area</u>	3.89	80%
Open Space	0.97	20%
Total	4.86	100%

2. Maximum Development Potential. Commercial development shall not exceed the following as permitted within the C-2 zoning district:

Multistory Indoor Storage Facility	
No. of square feet, max.:	105,850
Floor Area Ratio, max.:	±0.5
Lot area and lot width, min.:	None

3. Signage. All signage identifying the project shall comply with the City of Wildwood Land Development Regulations and Design District Standards

D. Amendments. All modifications requiring an amendment to the Planned Development Agreement shall require review by the Project Review Committee, review and recommendation of the Planning and Zoning Board and action by the City Commission in the same manner as an Application for Planned Development.

E. Future Approvals. After this Ordinance is recorded, and prior to any construction occurring, a site plan or subdivision preliminary plan shall be submitted for review and approval in the manner required by Chapter 4 or Chapter 5 of the Land Development Regulations, whichever Chapter is

applicable.

1. Developer's Agreement. Prior to approval of a site plan or a subdivision preliminary plan, the City and the Developer agree to enter into Utility or Developer's Agreements to address the provision of water, wastewater and reuse water to the Project. Said agreement(s) shall also specify, among other items, the ownership and maintenance of infrastructure associated with the Project.

F. Principal-Permitted Uses. The principal-only use-permitted use is a Multistory Indoor Storage Facility, consistent with the C-2 zoning district.

G. Development Standards. Unless otherwise noted, the Project shall adhere to the zoning district standards prescribed in Chapter 3 of the Land Development Regulations for the C-2 zoning district on land designated as such.

Building setbacks for both internal and external property lines shall be as follows:

Commercial		
Front, min.	East (CR 501)	25'
Rear, min.	West	15'
Side, min.	North and South	15'
<u>Accessory Structures</u>		
Rear and Side, min.	8'	

H. Design District Standards. Due to the Project's location within the Neighborhood Design District, the Project will meet applicable City of Wildwood's Design District Standards, unless otherwise noted in this Ordinance.

I. Recreation and Open Space. The Project shall maintain a minimum of 20% (0.97 acres) open space.

1. Buffers. The Project shall establish and maintain the following buffers:

Direction	Width (Ft)
North	None, shared driveway 20'
East	15' 20'
South	None, County jurisdiction, excess land for the Coleman Correctional Complex 20'
West	20'

Buffers shall contain landscape material in accordance with the Design District Standards. Regulated trees located within the required buffer area may not be removed unless approved by a certified arborist due to disease or natural disaster. Tree protection must occur consistent with LDR Section 6.10. A tree removal permit shall be obtained from the Development Services Department, per LDR Subsection 6.10(E).

2. Open Space. Open space shall include wetlands, preservation areas, greenspace, and landscape buffers. Open space may include areas such as trails, plazas, courtyards, and other similar public areas. Open space may also include recreation areas and amenities provided said amenities or area is not enclosed with air conditioned space. For purposes of meeting open space requirements, up to 50% of the drainage retention areas may be included in the open space calculation; however, the amount of open space credit from drainage retention areas shall not exceed 50% of the open space requirement. Open space shall not include open bodies of water, rights-of-way (public or private), yards or lots of record per plat, driveways, off street parking areas or other impervious surface areas that do not meet the criteria.

J. Environmental Considerations. An ecological site assessment was conducted in November 2020 by Bio-Tech Consulting, Inc. No federally listed or threatened species were identified onsite. The Project contains no documented environmental features, including FEMA floodplain or National Wetland Inventory wetlands, that warrant protection or preservation.

K. Public Facilities.

1. Potable Water, Wastewater, and Reuse Water. The Project shall be connected to the City's Potable Water and Sanitary Sewer systems prior to any certificates of occupancy being issued. The Project will also connect to the City's reuse water system prior to certificates of occupancy being issued, if available. Reuse water is not currently available to the Project.
2. Solid Waste. Solid waste services shall be provided by the City or the City's contracted refuse service provider.
3. Stormwater. The Project may utilize both above-ground and underground Stormwater Management Facilities (SMF) for the permitted use, increasing efficiency of the system and reducing the land area necessary to serve the use. The SMF shall be designed to City LDR Section 6.4 and Southwest Florida Water Management District design requirements, which requires preventing flooding of adjacent sites and ensuring the integrity of receiving waters.
4. Underground Utilities. All utilities on site shall be located underground. Developer is responsible for running utilities underground for the Project. The City shall insure that any utilities within any public utility easement serving lands other than the Project shall be underground.
5. Lighting. Exterior lighting of all buildings and parking lots shall be designed so that light is not directed off the Project. Exterior light fixtures should be fully shielded or designed with light-angle cut-offs to eliminate spill light, trespass light and glare. Lighting throughout the Project will comply with the requirements set forth in the City Land Development Code and Design District Standards.
6. Easements. The easement agreement granting access from Marsh Bend Trail through Sumter County tax parcel G33-025 has been recorded (B: 4389 P: 698). The easement agreement to retain access internal to the site shall be recorded following the Site Plan

approval. ~~There are no known easements on the Project site.~~

Commented [j1]: See City Attorney Comment regarding access easement for shared driveway

7. Transportation: Per the Traffic Impact Analysis (TIA) conducted on November 5, 2022 by CHW and attached hereto as Exhibit C, no improvements to the project driveways or adjacent roadways are warranted.
8. Transportation Concurrency: The responsibility to fund the improvements listed in Section L of this ordinance will be the responsibility of the Applicant/Developer. These improvements were identified in the Traffic Impact Analysis approved by Sumter County Public Works and are attached as Exhibit C.
9. Fire. The Florida Fire Prevention Code, 7th Edition applies to this development design.
10. Police. All traffic control signals or devices must comply with the Florida State Statutes regarding the installation. All traffic control signals or devices must conform to the manual and specifications published by the Florida Department of Transportation, to include but not limited to signs, size and height.

L. Access, Parking, and Transportation.

1. Access. The Project's access is from a shared driveway on Marsh Bend Trail. A driveway permit for access on Marsh Bend Trail (CR 501) will be obtained from Sumter County.
2. Transportation Impact Fees: Developer acknowledges that the Project is subject to Sumter County's impact fee ordinance.
3. Cross and shared access. Shared access will serve the Project site as well as both adjacent properties to the north and west. Cross access to the vacant adjacent property to the south is not possible due to the property being owned by the Federal government land used for the Coleman Correctional Complex.

Transportation System Improvements. ~~The Developer shall be responsible for the following improvements, which may be subject to impact fee credits from Sumter County. These There are no improvements are identified in the Traffic Impact Analysis approved with conditions by Sumter County Public Works on 12 December 2022. The study's roadway segment LOS analysis indicates that the added project trips does not cause deficiencies to Marsh Bend Trail, therefore, no transportation improvements are recommended to support the project traffic.~~

Developer is responsible for constructing these improvements during Phase 1 of the Development.

4. Internal vehicular circulation. Internal vehicular circulation will be provided by drive aisles, not roadways.
5. Parking. The minimum number of parking spaces required for the Indoor Storage Facility is four (4) spaces.

6. Pedestrian Facilities. No internal sidewalks are warranted due to the proposed automobile-oriented use.

- M. Maintenance of Common Areas and Open Spaces. Maintenance and repair of structures, paved areas (internal roadways and parking), lawn mowing, and landscaping maintenance of all common areas within the Project shall be the responsibility of the property owner or its designee such as a property owners association, at no cost or obligation to the City. In the event of noncompliance with the City Land Development Regulations, the City maintains the right to enforce same against the Developer, its successors or assigns, as may be applicable, by and through its code enforcement procedure and special magistrate. The Developer, its successors and/or assigns, shall provide guidelines to the City for approval, not to be reasonably withheld, conditioned, or delayed, for the maintenance of common areas. The City will conduct annual inspections of the approved landscaping. The City will be granted the right to enforce the common areas maintenance obligations against the Developer, its successors and/or assigns, as may be applicable, and to be reimbursed for the reasonable attorney's fees, costs and expenses, as may be reasonably incurred by the City.
- N. Enforcement of Rules and Regulations. For the maintenance of the common areas referenced in Section 3.(M) above, the applicable provisions in the Guidelines: (i) shall be made applicable to the Project; and (ii) shall be reviewed/approved by the City of Wildwood and a certificate of occupancy being issued for completed improvements; and (iii) will provide that the City of Wildwood shall have the right, but not the obligation, to enforce such maintenance obligations against a violating party and that the City should be entitled to reasonable attorney's fees and costs for enforcement regardless of whether or not a suit has been filed.
- O. Impact Fees. The Planned Development shall be subject to all impact fees applicable at the time of permitting. All impact fees are to be paid before issuance of any building permit. Proof of Sumter County impact fees paid shall be provided to the City of Wildwood. Any applicable impact fees adopted by the City of Wildwood, Sumter County, or the Sumter County School Board prior to issuance of building permits shall also be applicable to the Planned Development.
- P. Expiration of Planned Development Agreement. Significant construction must begin within the Project boundary (as legally described in "Exhibit A") within 24 months of the final adoption of the Planned Development Agreement. If no significant construction has started on the approved Project within 24 months, the Planned Development shall lapse and be of no further effect. The City Commission may extend the Planned Development for periods of up to twelve (12) months provided the applicant can show good cause why the said Project was delayed under the originally approved Planned Development Agreement. However, the City Commission shall not allow extensions beyond 48 months after the effective date of this Ordinance.

SECTION 4. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 5. This Ordinance shall be effective upon adoption during the second and final reading by the City of Wildwood City Commission.

DONE AND ORDAINED in regular session of the City Commission of the City of Wildwood, Sumter County, Florida, this _____ day of _____, 2022.

CITY COMMISSION
CITY OF WILDWOOD, FLORIDA

ED WOLF, MAYOR

ATTEST: _____
Susan Patterson, City Clerk

First Reading: _____

Second Reading: _____

Approved as to Form:

City Attorney

Exhibit A

LEGAL DESCRIPTION: (BY SURVEYOR)

THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, AND THE EAST 35.57 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, LESS THE NORTH 208.71 FEET THEREOF, LESS THE NORTH 30 FEET OF THE SOUTHEAST 1/4 OF THE SOUTHEAST OF SAID SECTION 33; AND LESS ROAD RIGHT OF WAY,

TOGETHER WITH THAT CERTAIN 1986 FLEETWOOD SINGLE WIDE MOBILE HOME, SERIAL NO. 31700999.

LESS AND EXCEPT:

COMMENCE AT THE SOUTH 1/4 CORNER OF SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, THENCE RUN S 89°48'04" E ALONG THE SOUTH LINE OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, A DISTANCE OF 1,290.43 FEET; THENCE N 00°30'15" E, A DISTANCE OF 631.15 FEET FROM A POINT OF BEGINNING; THENCE CONTINUE N 00°30'15" E, A DISTANCE OF 487.10 FEET TO A POINT ON A LINE 206.71 FEET (*SIC) SOUTH OF AND PARALLEL TO THE NORTH LINE OF SAID SECTION 33; THENCE S 89°44'49" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 35.57 FEET; THENCE N 00°30'15" E, A DISTANCE OF 178.71 FEET TO A POINT ON A LINE, 30 FEET SOUTH AND PARALLEL TO SAID NORTH LINE OF SECTION 33; THENCE S 89°44'49" E, ALONG SAID PARALLEL LINE, A DISTANCE OF 1,274.89 FEET TO THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD 501; THENCE S 00°27'25" W, ALONG SAID RIGHT-OF-WAY LINE, A DISTANCE OF 204.43 FEET TO A POINT OF CURVATURE ON A CURVE CONCAVE NORTHEASTERLY, HAVING A RADIUS OF 3,050.00 FEET, A CHORD BEARING OF S 03°42'26" E, A CHORD DISTANCE OF 442.94 FEET; THENCE RUN SOUTHEASTERLY ALONG THE ARC OF SAID CURVE, AND SAID WEST RIGHT-OF-WAY LINE, THROUGH A CENTRAL ANGLE OF 8°19'42", A DISTANCE OF 443.33 FEET; THENCE S 07°52'16" E, ALONG SAID WEST RIGHT-OF-WAY LINE, A DISTANCE OF 18.91 FEET; THENCE N 89°46'46" W, A DISTANCE OF 1,345.92 FEET TO THE POINT OF BEGINNING.

LESS AND EXCEPT:

A PORTION OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 2675, PAGE 100 OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, SAID LANDS LYING IN SECTION 33, TOWNSHIP 19 SOUTH, RANGE 23 EAST, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT THE SOUTHEAST CORNER OF SAID SECTION 33; THENCE ALONG THE SOUTH LINE OF THE SOUTHEAST 1/4 OF THE SOUTHEAST 1/4 OF SAID SECTION 33, THE FOLLOWING THREE (3) COURSES AND DISTANCES: 1) THENCE RUN NORTH 89°44'50" WEST, A DISTANCE

OF 14.42 FEET TO A POINT ON THE WEST RIGHT-OF-WAY LINE OF COUNTY ROAD NO. 501 (A VARIABLE WIDTH RIGHT-OF-WAY PER BOARD OF COUNTY COMMISSIONERS RIGHT-OF-WAY MAP, DATED JANUARY 12, 1994); 2) THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 370.01 FEET TO THE POINT OF BEGINNING; 3) THENCE CONTINUE NORTH 89°44'50" WEST, A DISTANCE OF 977.04 FEET TO THE SOUTHEAST CORNER OF VILLAGES OF SOUTHERN OAKS KELLER VILLAS, AS RECORDED IN PLAT BOOK 17, PAGES 3 THROUGH 3A, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SOUTH LINE, RUN NORTH 00°32'32" EAST, ALONG THE EAST LINE OF SAID PLATTED LANDS, A DISTANCE OF 631.00 FEET TO THE SOUTHWEST CORNER OF THE LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 3270, PAGE 322, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID EAST LINE, RUN SOUTH 89°44'31" EAST, ALONG THE SOUTH LINE OF SAID LANDS, A DISTANCE OF 1346.20 FEET TO A POINT ON THE AFORESAID WEST RIGHT-OF-WAY OF COUNTY ROAD NO. 501; THENCE DEPARTING SAID SOUTH LINE, RUN ALONG SAID WEST RIGHT-OF-WAY THE FOLLOWING TWO (2) COURSE AND DISTANCES: 1) THENCE RUN SOUTH 07°47'53" EAST, A DISTANCE OF 8.28 FEET; 2) THENCE RUN SOUTH 00°34'30" WEST, A DISTANCE OF 51.81 FEET; THENCE DEPARTING SAID WEST RIGHT-OF-WAY LINE, RUN NORTH 89°44'31" WEST, A DISTANCE OF 370.01 FEET; THENCE RUN SOUTH 00°34'30" WEST, A DISTANCE OF 570.91 FEET TO THE POINT OF BEGINNING.

*SIC = SCRIVENER ERROR: LEGAL DESCRIPTION CALLS FOR A POINT 206.71 FEET, BUT IT SHOULD BE 208.71 FEET.

~~2nd~~-~~3rd~~ DRAFT: ~~March 6~~May 4, 2023

[INSERT PD PLANS, SHEETS 2 AND 3]

Exhibit B

Commented [RT2]: UPDATE when final

DRAFT

[INSERT TIA]

Exhibit C

Commented [RT3]: UPDATE when Accepted

DRAFT

City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for O2023-19. The parcel is generally located west at the intersection of Marsh Bend Trail and Myrtle Dr.

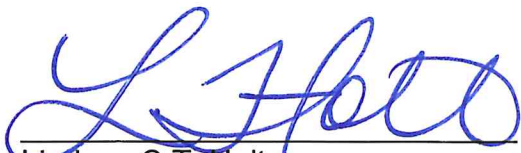
Case #	PD 2212-001 Thomas Group Planned Development
Parcel(s)	G04LRI-002
Applicant	Word Family LLC
Owner	Word Family LLC

Under Land Development Regulation (LDR) § 8.2(E), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed planned development amendments.

Based upon the testimony, evidence and information presented as to the criteria set forth in LDR § 8.2(G), the Special Magistrate recommends approval of the planned development amendment.

The Special Magistrate gives a favorable recommendation of Ordinance O2023-19 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: CP 2302-002 Lucky U Landholding LLC

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance Number O2023-20.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case #	CP 2302-002 Lucky U Landholding LLC
Ordinance #	O2023-20
Applicant	LPG Urban & Regional Planners Inc (Michael Rankin)
Owner	Nina Jean Driggers Davis, et al
Property Location	Generally located at the corner of N US 301 and CR 126
Parcel Number(s)	D29-023 and D29-024
Date	6/19/2023

The applicant, Michael Rankin of LPG Urban & Regional Planners Inc, representing Nina Jean Driggers Davis seeks approval from the City Commission for a Small-Scale Comprehensive Plan Amendment to change the Future Land Use Map designation from Industrial (Sumter County) to Commercial (City) for the parcels listed above on 4.45 acres MOL. This request is accompanied by rezoning request RZ 2302-003.

Staff believes the proposed amendment should be granted based on the following criteria found in Land Development Regulation (LDR) §1.7(D).

(1) Justification of the proposed amendment has been adequately presented;

The applicant proposes the development of a thirteen thousand one hundred fifty-one (13,151) square foot retail/service and motorcycle repair shop on approximately 4.45 acres MOL. Justification has been presented to the city to support the proposed development, with the surrounding parcels on the FLUM depicting a mix of High-Density Residential (HDR), Commercial (COM), and Industrial (IN), which fits with the desired land use amendment request.

(2) The proposed amendment is not inconsistent with the goals, objectives and policies of the comprehensive plan;

The proposed amendment is not inconsistent with the policies of the Comprehensive Plan. Commercial (COM) Future Land Use designation within the 2050 Comprehensive Plan allows for a maximum intensity of point five (0.5) FAR or seventy-five percent (75%) ISR on the subject property, designated under the 2050 Comprehensive Plan FLU Policy 1.1.1, placing the project within acceptable development standards. The proposed development conforms to Policies 1.2.8.e. by assisting in developing a thriving and equitable economy. In addition to Objective 1.4 of the Future Land Use Element of the 2050 Comprehensive Plan, which states that the city shall cultivate an environment that fosters, supports, and champions economic growth. Surrounding parcels, specifically those to the east are currently primarily zoned for industrial, with the surrounding area to the southwest and west composed of a mix of High-Density Residential (HDR) and Commercial (COM). This mix of uses is compatible with the desired land use change and follows policy 1.2.8.a. which seeks to contribute to a mix of land uses.

Additionally, Policy 1.1.4 stipulates that the City's zoning map shall be consistent with the FLUM, and further refine densities, intensities, and permitted uses. As such the proposed amendment is not inconsistent with the FLUM and conforms with the 2050 Comprehensive Plan.

(3) The proposed amendment should not be considered urban sprawl or exemplify an energy inefficient land use pattern;

The amendment is not considered urban sprawl, and it does not exemplify an energy-inefficient land use pattern. The subject property is located at the corner of N US 301 and CR 126. As the existing mix of land use designations are mainly rural residential (R4C and R2C) within the county, and Commercial (COM), with some High Density Residential (HDR) in the city. The proposed development would seek to utilize currently vacant land in a way that conforms to Policy 1.4.5. of the Comprehensive Plan, which states that the city shall encourage and support the revitalization of vacant and underutilized retail spaces. The proposed development indirectly combats urban sprawl through its use of compact design principles as stated under policy 1.2.8.b.

(4) The proposed amendment will not have an adverse effect on environmentally sensitive systems;

The proposed amendment will not have an adverse effect on environmentally sensitive systems. Environmental and ecological assessments were conducted by Stillwater Environmental, Inc on January 3rd, 2023. Areas classified as wetland/surface waters were not located within, or immediately adjacent to the subject property. Additionally, surveys did not result in the location of any "potentially occupied" gopher tortoise burrows or any other listed wildlife. It was recommended that a hundred percent (100%) survey be conducted prior to the initiation of any construction activities.

(5) The proposed amendment will not adversely affect transportation, potable water, sewer, schools or other public facilities without providing remedies to correct the system or facility.

Transportation: Access to the site is proposed via two (2) access driveways, one (1) right-in/right-out (RI/RO) access driveway on US 301, and one (1) full access driveway on CR 126. A full TIA was submitted to and accepted by Sumter County, with the proposed development

projected to generate 628 daily external trips, of which 25 trips occur during the AM peak hour, and 70 trips during the PM peak hour. Findings within the accepted TIA stated that the roadway capacity analysis indicates that all study roadway segments (N US 301 & CR 126) are projected to operate at acceptable LOS at the project buildout.

Potable Water & Sewer: There is an existing 10" water main along the railroad tracks to the east of the parcel, as well as a 6" force main. The subject properties are in an infill demand service area according to the 2019 Utility Master Plan. City water and sewer are available for the subject property. The applicant/owner will work with City utilities at the site plan stage to connect to City water and sewer.

Schools: The commercial development is estimated to add no students to Wildwood Schools.

A handwritten signature in black ink, reading "Shaun Raja". The signature is written in a cursive, flowing style.

Shaun Raja
Planner I, Development Services Department

ORDINANCE NO. O2023-20

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROPOSING A SMALL SCALE FUTURE LAND USE MAP AMENDMENT TO THE ADOPTED COMPREHENSIVE PLAN AND FUTURE LAND USE MAP IN ACCORDANCE WITH THE COMMUNITY PLANNING ACT OF 2011, AS AMENDED; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City of Wildwood, Florida, is proposing to amend the local Comprehensive Plan and Future Land Use Map of said City, to include a land use amendment described as follows, to-wit:

Parcel(s) D29-023 & D29-024
Nina Jean Driggers Davis et al (Owner)
4.45 Acres +/-

LEGAL DESCRIPTION:

PARCEL 1:

BEGINNING 15 FEET NORTH AND 200 FEET EAST, FROM THE S.W. CORNER OF S.W. 1/4 OF S.W. 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, RUNNING 210 FEET WEST, THENCE 336 FEET NORTH, THENCE 210 FEET WEST, THENCE 336 FEET SOUTH TO POINT OF BEGINNING, SUMTER COUNTY, FLORIDA.

TOGETHER WITH:

BEGINNING 15 FEET NORTH AND 470 FEET EAST FROM THE S.W. CORNER OF THE S.W. 1/4 OF THE S.W. 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, RUN THENCE 336 FEET NORTH FOR POINT OF BEGINNING; THENCE RUN EAST 210 FEET, THENCE NORTH 210 FEET, THENCE WEST 210 FEET, THENCE RUN SOUTH 210 FEET TO POINT OF BEGINNING. ALSO FROM SAID POINT OF BEGINNING, RUN WEST 210 FEET, NORTH 210 FEET, EAST 210 FEET, THENCE RUN SOUTH 210 FEET TO POINT OF BEGINNING, SUMTER COUNTY, FLORIDA.

ALSO TOGETHER WITH:

BEGINNING 50 FEET EAST AND 141 FEET NORTH, FROM THE S.W. CORNER OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, RUN 210 FEET NORTH, THENCE 210 FEET EAST, THENCE 210 FEET SOUTH, THENCE 210 FEET WEST TO POINT OF BEGINNING, SUMTER COUNTY, FLORIDA.

LESS RIGHT OF WAY FOR U.S. HIGHWAY 301/STATE ROAD NO. 35 AS PER FLORIDA DEPARTMENT OF TRANSPORTATION MAINTENANCE MAP, SECTION 18010, DATED 10-01-07.

PARCEL 2:

BEGINNING 50 FEET EAST AND 15 FEET NORTH, FROM THE S.W. CORNER OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, RUN 126 FEET NORTH, THENCE 210 FEET EAST, THENCE 126 SOUTH, THENCE 210 FEET WEST TO POINT OF BEGINNING, SUMTER COUNTY, FLORIDA.

(LESS RIGHT OF WAY FOR U.S. HIGHWAY 301/STATE ROAD NO. 35 AS PER FLORIDA DEPARTMENT OF TRANSPORTATION MAINTENANCE MAP, SECTION 18010, DATED 10-01-07.

This property is to be reclassified from Industrial (Sumter County) to Commercial (City) and contains 4.45 acres, more or less:

AND WHEREAS, the City is proposing to amend the Future Land Use Map to include the future land use of property that shall pertain and be applicable to said amendment.

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

SECTION 1. The adopted local Comprehensive Plan and Future Land Use Map for the City of Wildwood, Florida, are hereby amended to include the above-referenced property and proposed land use amendment as indicated above. The amendment to the Future Land Use Map of the local comprehensive plan is attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 2. All ordinances or parts of ordinances in conflict herewith, be, and the same are hereby repealed.

SECTION 3. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 4. This Ordinance shall take effect 31 days after its final reading by the City Commission of the City of Wildwood.

DONE AND ORDAINED this ____ day of _____, 2023, by the City Commission of the City of Wildwood, Florida.

CITY COMMISSION
CITY OF WILDWOOD, FLORIDA

Ed Wolf, Mayor

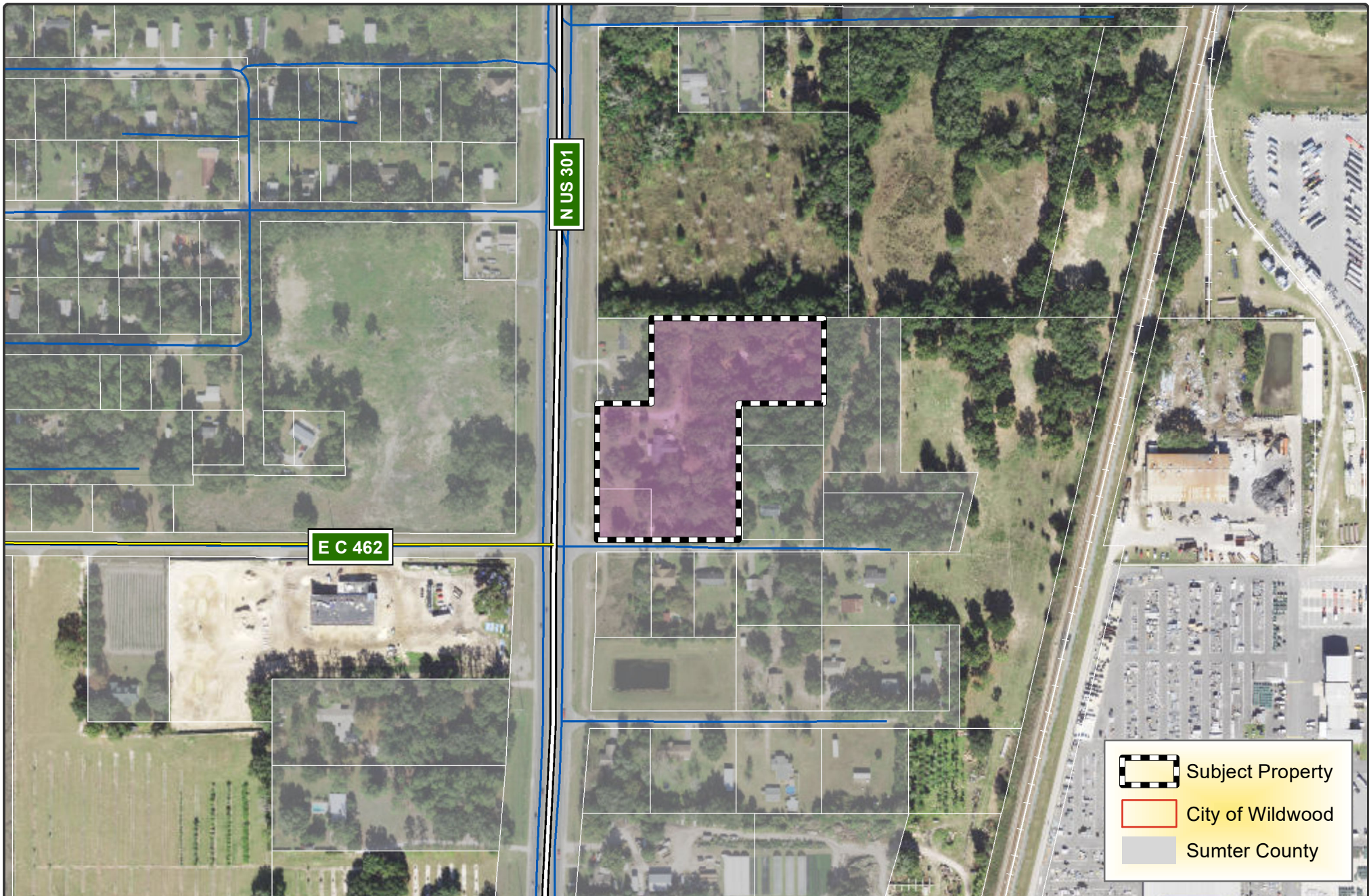
ATTEST: _____
Susan Patterson, City Clerk

First Reading: _____

Second Reading: _____

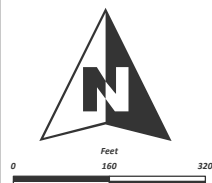
Approved as to form:

City Attorney



**CITY OF
WILDWOOD**

100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



CP 2302-002

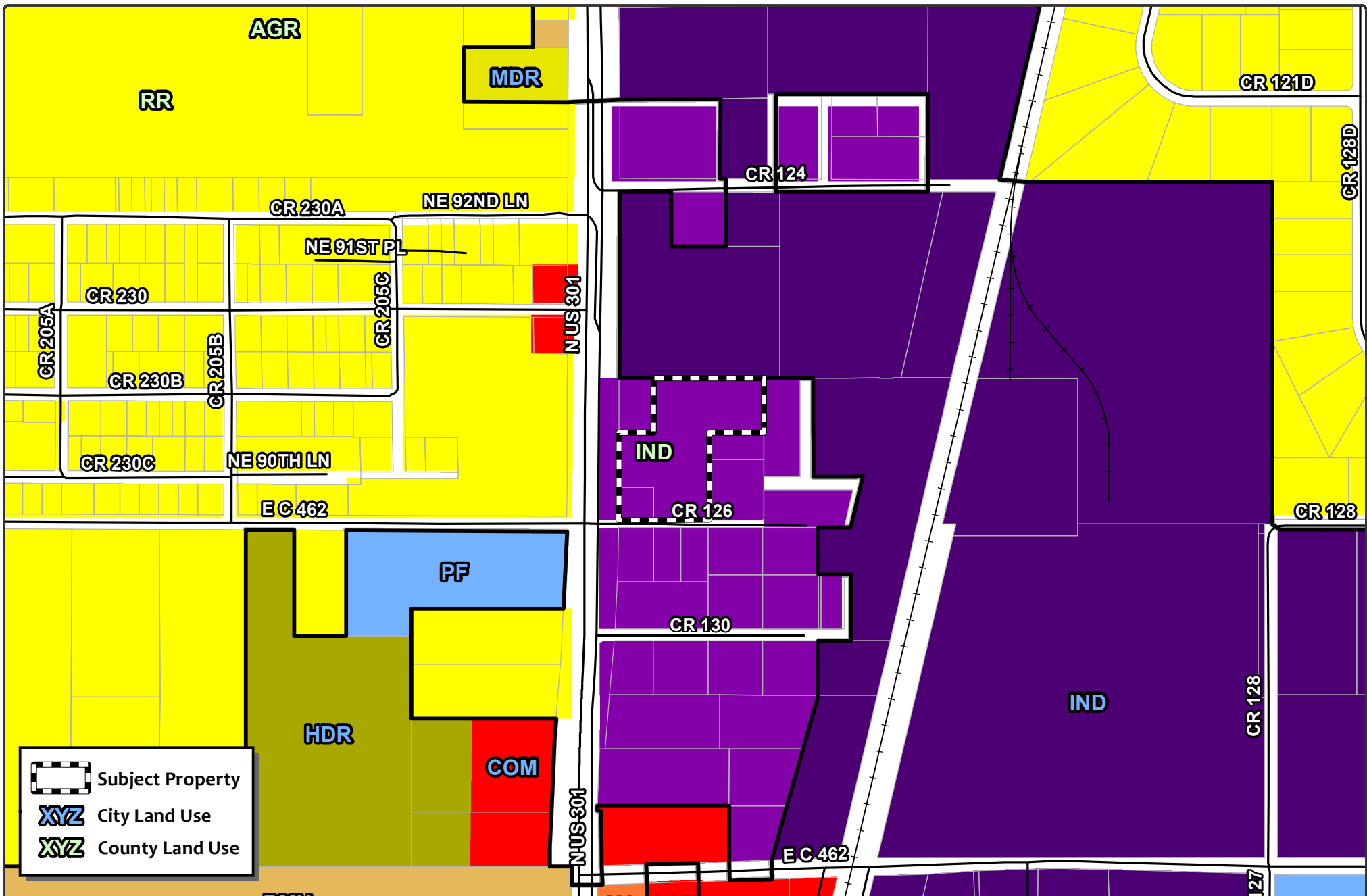
LUCKY U LANDHOLDING LLC

PARCELS D29-023 & D29-024

MAP 1B

**LOCATION
MAP**

**MAY
2023**

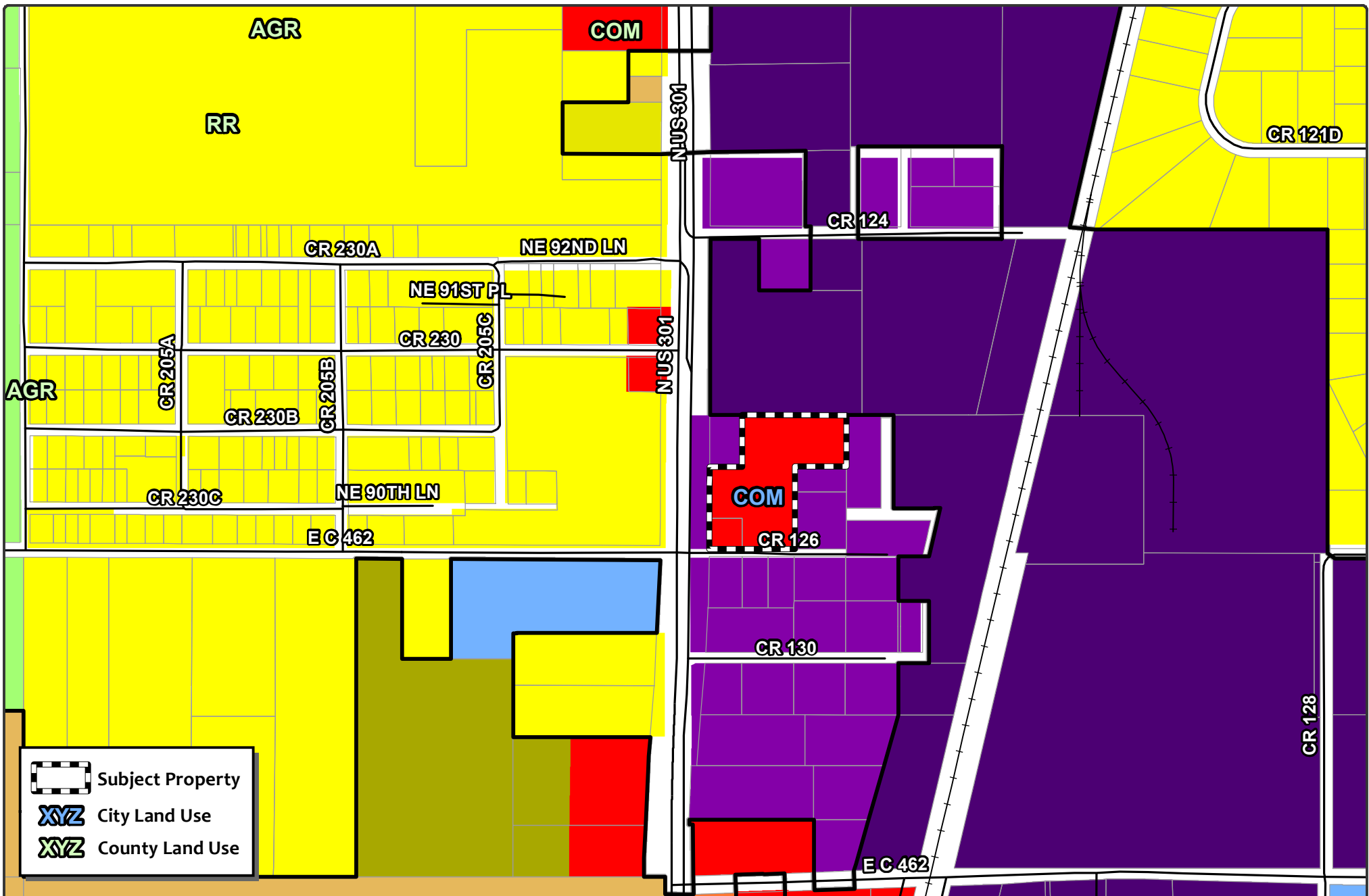


CITY OF WILDWOOD
 100 North Main Street
 Wildwood, FL 34785
 Phone: (352) 330-1330
www.wildwood-fl.gov



CP 2302-002
LUCKY U LANDHOLDING LLC
PARCELS D29-023 & D29-024

MAP 2A
EXISTING
LAND USE
MAY
2023



Subject Property



City Land Use



County Land Use



CITY OF
WILDWOOD

100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



0 260 520
Feet

CP 2302-002

LUCKY U LANDHOLDING LLC

PARCELS D29-023 & D29-024

MAP 2B

PROPOSED
LAND USE

MAY
2023

City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate
as Local Planning Agency

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate as the Local Planning Agency for a Comprehensive Plan amendment to amend the FLU map designation from Industrial (Sumter County) to Commercial (City) on 4.45 acres MOL.

Case No: CP 2302-002 Lucky U Landholding LLC

Applicant: Ryan Thompson, CHW

Owner: Thomas Group Investments #1 LLC

Parcel Number(s): D29-023 & D29-024

Under Land Development Regulation (LDR) § 1.7(C), the Planning and Zoning Board/Special Magistrate as Local Planning Agency has a duty to make a recommendation to the City Commission on all proposed Comprehensive Plan amendments.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 1.7(D), the Special Magistrate recommends approval of the Comprehensive Plan amendment and gives a favorable recommendation of Ordinance O2023-20 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: RZ 2302-003 Lucky U Landholding LLC

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance Number O2023-21 subject to the approval of O2023-20, which establishes a Future Land Use appropriate to the proposed zoning.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case #	RZ 2302-003 Lucky U Landholding LLC
Ordinance #	O2023-21
Applicant	LPG Urban & Regional Planners Inc (Michael Rankin)
Owners	Nina Jean Driggers Davis, et al
Property Location	Generally located at the corner of N US 301 and CR 126
Parcel Number(s)	D29-023 & D29-024
Date	6/19/2023

The applicant, Michael Rankin of LPG Urban & Regional Planners Inc, representing Nina Jean Driggers Davis is seeking approval from the City Commission to change the zoning district from RR1C, R2C, and CN (Sumter County) to C-3 (City) for the parcel listed above on 4.45 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment CP 2302-002 (O2023-20)

ANALYSIS: The applicant proposes the development of a thirteen thousand one hundred fifty-one (13,151) square foot retail/service and motorcycle repair shop.

Pursuant to Land Development Regulation (LDR) § 3.3(C)(4), staff believes the zoning change to C-3 should be granted based on the following criteria:

(a) Whether the proposed change is consistent with the comprehensive plan;

The proposed rezoning to C-3 is consistent with the proposed Future Land Use Map designation of Commercial (COM) and the intent of the Comprehensive Plan as stated in FLU policy 1.2.8.e. and policy 1.2.8.i. These policies state that the city shall develop a thriving and

equitable economy, while also maintaining compatibility with adjacent land uses through the use of design standards, buffering, and vegetative buffering. Surrounding parcels, specifically those to the east, are currently primarily zoned M-1 for light industrial. However, the surrounding area to the southwest and west is composed of a mix of uses, with both R-5 residential and C-3 commercial parcels.

(b) The existing land use pattern of the surrounding area;

The land use pattern of the surrounding area is a mix of residential, commercial, and industrial. The proposed C-3 zoning designation will follow policy 1.2.8.I. which seeks to maintain compatibility with adjacent land uses. As well as policy 1.2.8.a. which states that the city should contribute to a mix of land uses that are compatible with existing communities. The proposed development would conform with the existing land use pattern and would fit within the existing FLUM.

(c) The possibility of adversely affecting public facilities such as schools, utilities, streets, etc;

Schools:

The proposed development is commercial and is not intended to add any new students to the Wildwood school system.

Potable Water & Sewer:

There is an existing 10" water main along the railroad tracks to the east of the parcel, as well as a 6" force main. The subject properties are in an infill demand service area according to the 2019 Utility Master Plan. City water and sewer are available to the subject property. The applicant/owner will work with City utilities at the site plan stage to connect to City water and sewer.

Streets:

The applicant has submitted a full TIA to Sumter County, prepared by Traffic & Mobility Consultants, and the findings have been accepted by the county on April 21, 2023. Access to the site is proposed via two (2) access driveways, one (1) right-in/right-out (RI/RO) access driveway on US 301, and one (1) full access driveway on CR 126, with the proposed development projected to generate 628 daily external trips, of which 25 trips occur during the AM peak hour, and 70 trips during the PM peak hour. Findings within the accepted TIA stated that the roadway capacity analysis indicates that all study roadway segments (N US 301 & CR 126) are projected to operate at acceptable LOS at the project buildout.

(d) Whether changed or changing conditions make the passage of the proposed amendment necessary;

Recent developments in the area have resulted in changing land uses from Industrial, and Low-Density residential to High-Density Residential and commercial properties. These changing conditions make the rezoning to a C-3 commercial designation more in line with the trending future developments within the surrounding area.

(e) Whether the proposed change will create or excessively increase traffic congestion or otherwise be a detriment to public safety;

The property will generate six hundred and twenty-eight (628) daily external trips per the submitted TIA, this is not an insignificant increase in estimated traffic. However, as stated in the findings of the TIA, the study finds that the roadway capacity will continue to operate at acceptable LOS standards upon full build-out.

. (f) Whether the proposed change will be a deterrent to the improvement or development of adjacent property;

The proposed rezoning will not be a deterrent to the improvement or development of adjacent properties. Surrounding properties are permitted to develop in accordance with their zoning map designation. While properties that remain in Sumter County's jurisdiction are allowed to develop according to their jurisdiction's future land use and zoning designations.

ZONING DESIGNATION

SURROUNDING PROPERTIES

NORTH	M-1 (City)
SOUTH	R4C (County)
EAST	R2C & CL (County)
WEST	A10C (County) PEU (City)

If the rezoning is approved, the applicant will be required to submit a site plan to the City prior to development. The site plan will need to follow requirements established in the City's Land Development Regulations and the Design District Standards or Developer's Agreements that may be needed.



Shaun Raja,
Planner I, Development Services Department

ORDINANCE NO. O2023-21

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA;
PROPOSING A ZONING MAP AMENDMENT TO THE
OFFICIAL ZONING MAP IN ACCORDANCE WITH
SECTIONS 3.2 AND 3.3 OF THE LAND DEVELOPMENT
REGULATIONS; PROVIDING FOR CODIFICATION;
PROVIDING FOR CONFLICT; PROVIDING FOR
SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE
DATE.

WHEREAS, the City of Wildwood, Florida, is proposing to amend the Official Zoning Map of said City, to include a rezoning of real property described as follows, to-wit:

Parcel(s) D29-023 & D29-024
Nina Jean Driggers Davis et al (Owner)
4.45 Acres +/-

LEGAL DESCRIPTION:

PARCEL 1:

BEGINNING 15 FEET NORTH AND 200 FEET EAST, FROM THE S.W. CORNER OF S.W. 1/4 OF S.W. 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, RUNNING 210 FEET WEST, THENCE 336 FEET NORTH, THENCE 210 FEET WEST, THENCE 336 FEET SOUTH TO POINT OF BEGINNING, SUMTER COUNTY, FLORIDA.

TOGETHER WITH:

BEGINNING 15 FEET NORTH AND 470 FEET EAST FROM THE S.W. CORNER OF THE S.W. 1/4 OF THE S.W. 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, RUN THENCE 336 FEET NORTH FOR POINT OF BEGINNING; THENCE RUN EAST 210 FEET, THENCE NORTH 210 FEET, THENCE WEST 210 FEET, THENCE RUN SOUTH 210 FEET TO POINT OF BEGINNING. ALSO FROM SAID POINT OF BEGINNING, RUN WEST 210 FEET, NORTH 210 FEET, EAST 210 FEET, THENCE RUN SOUTH 210 FEET TO POINT OF BEGINNING, SUMTER COUNTY, FLORIDA.

ALSO TOGETHER WITH:

BEGINNING 50 FEET EAST AND 141 FEET NORTH, FROM THE S.W. CORNER OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, RUN 210 FEET NORTH, THENCE 210 FEET EAST, THENCE 210 FEET SOUTH, THENCE 210 FEET WEST TO POINT OF BEGINNING, SUMTER COUNTY, FLORIDA.

LESS RIGHT OF WAY FOR U.S. HIGHWAY 301/STATE ROAD NO. 35 AS PER FLORIDA DEPARTMENT OF TRANSPORTATION MAINTENANCE MAP, SECTION 18010, DATED 10-01-07.

PARCEL 2:

BEGINNING 50 FEET EAST AND 15 FEET NORTH, FROM THE S.W. CORNER OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, RUN 126 FEET NORTH, THENCE 210 FEET EAST, THENCE 126 SOUTH, THENCE 210 FEET WEST TO POINT OF BEGINNING, SUMTER COUNTY, FLORIDA.

(LESS RIGHT OF WAY FOR U.S. HIGHWAY 301/STATE ROAD NO. 35 AS PER FLORIDA
DEPARTMENT OF TRANSPORTATION MAINTENANCE MAP, SECTION 18010, DATED 10-01-07.

This property is to be reclassified from RR-1C, R2C and CN (Sumter County) to
C-3 (City) containing 4.45 acres, more or less;

AND WHEREAS, the rezoning is consistent with the City's Comprehensive Plan and
Land Development Regulations.

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission
of the City of Wildwood, Florida, as follows:

SECTION 1. The Official Zoning Map of the City of Wildwood, Florida is hereby
amended to include the above-referenced property as indicated above. The amendment
to the Official Zoning Map is attached hereto as "Exhibit A" and incorporated herein by
reference.

SECTION 2. All ordinances or parts of ordinances in conflict herewith, be, and the
same are hereby repealed.

SECTION 3. If any section, sentence, clause or phrase of this Ordinance is held
to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding
shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 4. This Ordinance shall take effect 31 days after its final reading by the
City Commission of the City of Wildwood.

DONE AND ORDAINED this ____ day of _____, 2023, by the City
Commission of the City of Wildwood, Florida.

CITY COMMISSION
CITY OF WILDWOOD, FLORIDA

Ed Wolf, Mayor

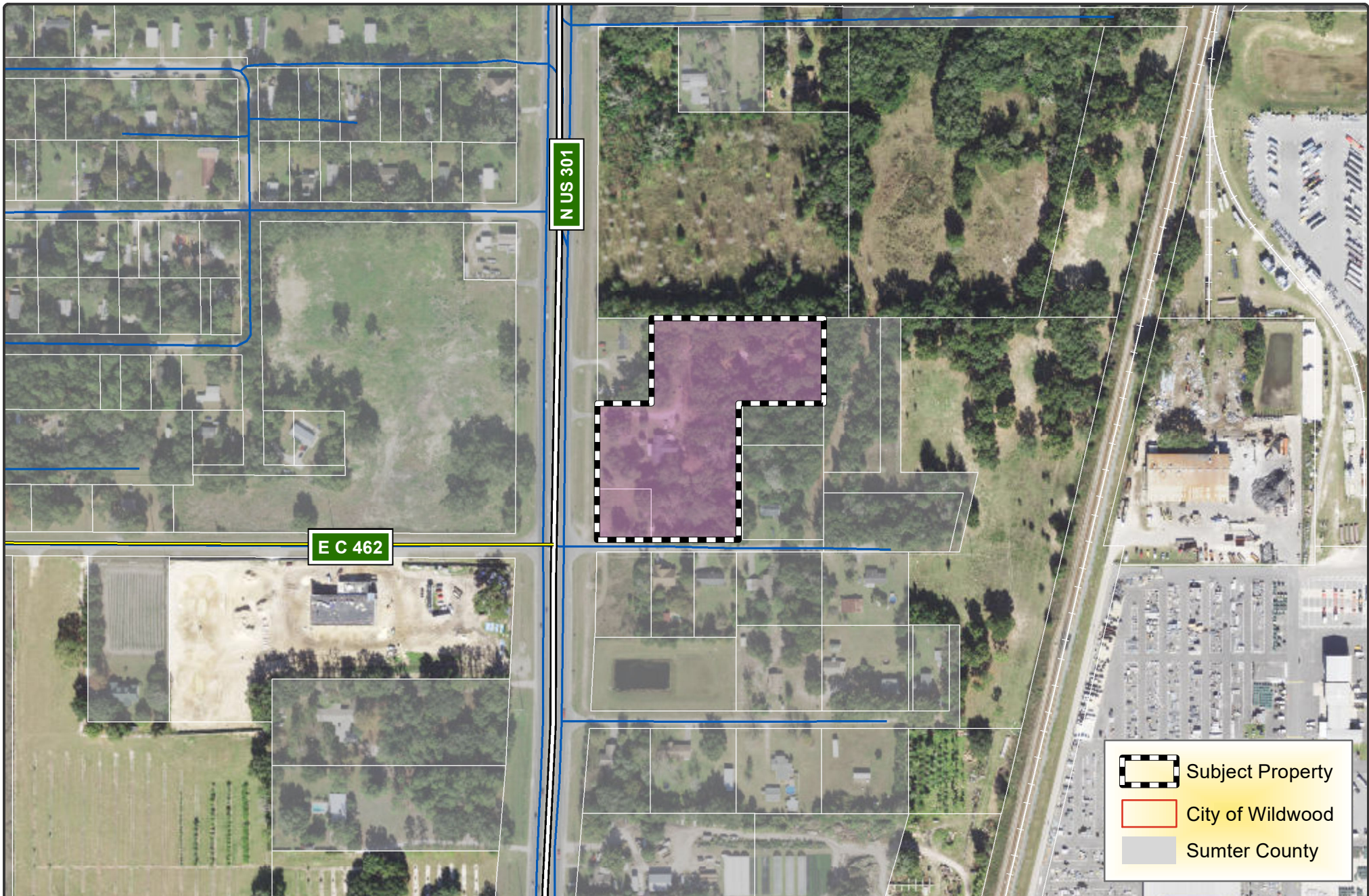
ATTEST: _____
Susan Patterson, City Clerk

First Reading: _____

Second Reading: _____

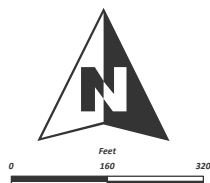
Approved as to form:

City Attorney



**CITY OF
WILDWOOD**

100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



RZ 2302-003

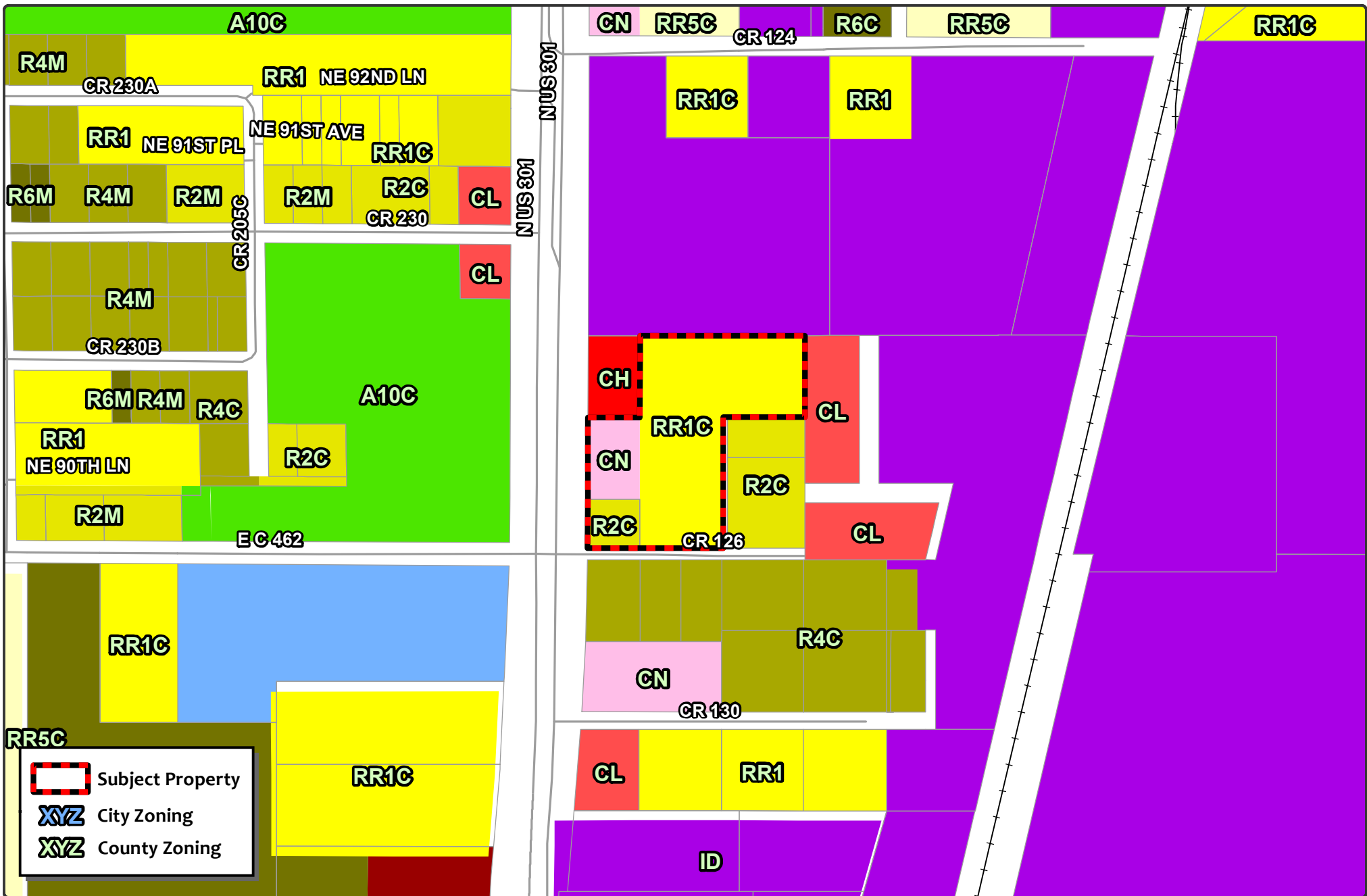
LUCKY U LANDHOLDING LLC

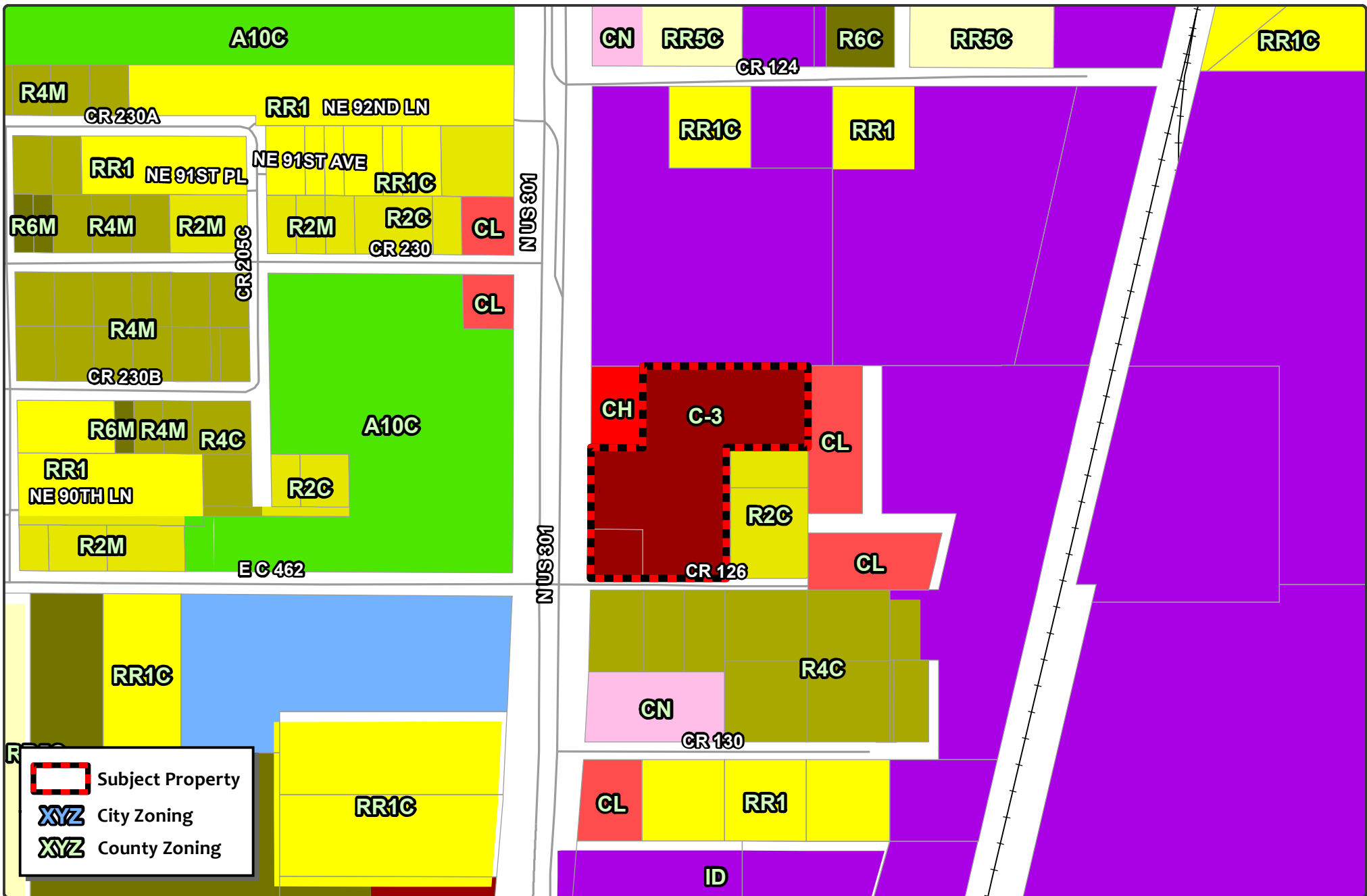
PARCELS D29-023 & D29-024

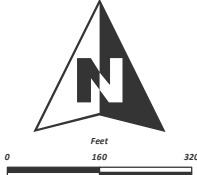
MAP 1B

**LOCATION
MAP**

**MAY
2023**





 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 Feet 0 160 320	RZ 2302-003 LUCKY U LANDHOLDING LLC PARCELS D29-023 & D29-024	MAP 3B PROPOSED ZONING MAY 2023
---	---	--	---	--

City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for a Zoning Map Amendment to change the zoning district from RR1C, CN, and R2C (Sumter County) to C-3 (City) on 4.45 acres MOL.

Case # RZ 2302-003 Lucky U Landholding LLC
Applicant Michael Rankin – LPG Urban & Regional Planners Inc
Owner Nina Jean Driggers Davis, et al
Parcel Number(s) D29-023 & D29-024

Under Land Development Regulation (LDR) § 1.7(B)(2), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed Zoning Map amendments.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 1.7(D), the Special Magistrate recommends approval of the Zoning Map amendment and gives a favorable recommendation of Ordinance O2023-21 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: CP 2304-001 House of Hope

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance Number O2023-22.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case #	CP 2304-001 House of Hope
Ordinance #	O2023-22
Applicant	Mary Starkey
Owner	Coniglio C. John Trustee
Property Location	Generally located along CR 126, approximately 0.17 miles east of the intersection of N US 301 and E C 462
Parcel Number(s)	D29B001
Date	6/19/2023

The applicant seeks approval from the City Commission for a Small-Scale Comprehensive Plan Amendment to change the Future Land Use Map designation from Industrial (City) to Commercial (City) for the parcels listed above on 5.56 acres MOL. This request is accompanied by rezoning request RZ 2304-002.

Staff believes the proposed amendment should be granted based on the following criteria found in Land Development Regulation (LDR) §1.7(D).

(1) Justification of the proposed amendment has been adequately presented;

The applicant proposes the development of a rehabilitation facility, consisting of an administration building, lodging building, future warehouse, thrift store, and a future training building on 5.56 acres MOL. Justification has been presented to the city to support the proposed development, which includes a faith-based recovery program with counseling services, skills training and on-site dormitories.

(2) The proposed amendment is not inconsistent with the goals, objectives and policies of the comprehensive plan;

The proposed amendment is not inconsistent with the policies of the Comprehensive Plan. Commercial (COM) Future Land Use designation within the 2050 Comprehensive Plan allows for a maximum intensity of point five (0.5) FAR or seventy-five percent (75%) ISR on the subject property, designated under the 2050 Comprehensive Plan FLU Policy 1.1.1, placing the project within acceptable development standards. With the proposed facility conforming to Policies 1.2.8.f. & 1.2.8.g., which states that the city shall foster distinctive neighborhoods with a strong sense of place, and the preservation of open space. Surrounding parcels, specifically those to the east, are currently primarily zoned for industrial, with the FLU solidly industrial. However, the surrounding area to the southwest and west are composed of a mix of uses, with High-Density Residential (HDR) and Commercial (COM).

Additionally, Policy 1.1.4 stipulates that the City's zoning map shall be consistent with the FLUM, and further refine densities, intensities, and permitted uses. The proposed development is consistent with the FLUM, and under Objective 3.2 of the Housing Element the city shall encourage the provision of affordable housing, as the proposed facility will seek to provide. As such, the proposed amendment is not inconsistent with the FLUM and conforms with the Comprehensive Plan.

(3) The proposed amendment should not be considered urban sprawl or exemplify an energy inefficient land use pattern;

The amendment is not considered urban sprawl, and it does not exemplify an energy-inefficient land use pattern. The subject property is located along CR 126, east of the intersection of N US 301 and E C 462. As the existing mix of land use designations are mainly rural residential (R4C and R2C) within the county, and Commercial (COM), with some High Density Residential (HDR) in the city. The proposed development would maintain much of the existing open space while conforming to Policy 1.2.7.e. of the Comprehensive Plan. The proposed development directly combats urban sprawl by preserving natural environmental features, while assisting in developing a thriving and equitable economy through training, education, and employment for those who need it most.

(4) The proposed amendment will not have an adverse effect on environmentally sensitive systems;

The proposed amendment will not have an adverse effect on environmentally sensitive systems. According to current FEMA flood maps, no wetlands and/or surface waters are present within the project boundary. Additionally, most of the existing yard and green space will be maintained.

(5) The proposed amendment will not adversely affect transportation, potable water, sewer, schools or other public facilities without providing remedies to correct the system or facility.

Transportation: Access to the property is proposed from CR 126, which is a minor local road maintained by the county. A minimum twenty (20) foot wide ingress/egress easement will need to be obtained on CR 126 from the county prior to or during the site plan stage. Parking will be minimal as program participants will not have access to personal/private transportation during the program. Additionally, an increase in traffic to and from the site will be minimal and will be limited in its effect on nearby roads.

Potable Water & Sewer: There is an existing 10" water main along the railroad tracks to the east of the parcel, as well as a 6" force main. The subject properties are in an infill demand

service area according to the 2019 Utility Master Plan. City water and sewer are available to the subject property. The applicant/owner will work with City utilities at the site plan stage to connect to City water and sewer.

Schools: The commercial development is estimated to add no students to Wildwood Schools.

A handwritten signature in black ink that reads "Shaun Raja". The signature is written in a cursive, flowing style.

Shaun Raja
Planner I, Development Services

ORDINANCE NO. O2023-22

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROPOSING A SMALL SCALE FUTURE LAND USE MAP AMENDMENT TO THE ADOPTED COMPREHENSIVE PLAN AND FUTURE LAND USE MAP IN ACCORDANCE WITH THE COMMUNITY PLANNING ACT OF 2011, AS AMENDED; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City of Wildwood, Florida, is proposing to amend the local Comprehensive Plan and Future Land Use Map of said City, to include a land use amendment described as follows, to-wit:

Parcel(s) D29B001
Coniglio C. John Trustee (Owner)
5.56 Acres +/-

LEGAL DESCRIPTION:

A PARCEL OF LAND IN THE WEST ½ OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST AND IN THE NORTHWEST ¼ OF THE NORTHWEST ¼ OF SECTION 32, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, AND LYING WESTERLYLY OF C.S.X. TRANSPORTATION, INC'S WESTERLY RIGHT OF WAY LINE, SAID PARCEL BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT A POINT ON THE NORTH LINE OF THE SOUTHEAST ¼ OF THE SOUTHWEST ¼ OF AFORESAID SECTION 29, SAID POINT BEING 50.00 FEET WEST (AS MEASURED AT RIGHT ANGLES) OF THE CENTERLINE OF C.S.X. TRANSPORTATION, INC.'S MAIN LINE TRACK; FROM SAID POINT, RUN S13°15'50"W PARALLEL WITH AND 50.00 FEET FROM THE CENTERLINE OF SAID WESTERLY TRACK; 789.24 FEET, TO THE NORTH LINE OF LOT 1, BLOCK A, ORANGE HEIGHTS SUBDIVISION, PLAT BOOK 3, PAGE 25, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA FOR THE POINT OF BEGINNING; THENCE CONTINUE S13°15'50"W PARALLEL WITH AND 50.00 FEET FROM THE CENTERLINE OF SAID WESTERLY TRACK, 591.50 FEET; THENCE DEPARTING SAID PARALLEL LINE RUN S89°54'37"W, 264.69 FEET TO A POINT ON THE EASTERLY EXTENSION OF THE NORTH LINE OF LOT 4, BLOCK D, ORANGE HEIGHTS, AND TO THE CENTERLINE OF MARCIA STREET IN AFORESAID ORANGE HEIGHTS; THE FOLLOWING TWO (2) COURSES BEING ALONG SAID CENTERLINE OF MARCIA STREET; RUN N00°23'55"E., 2.95 FEET; THENCE N13°33'07"E., 199.37 FEET TO A POINT ON THE EASTERLY EXTENSION OF THE SOUTH LINE OF LOT 8, BLOCK B, ORANGE HEIGHTS; THENCE RUN N89°51'23"W., 191.52 FEET ALONG SAID EXTENSION LINE AND SOUTH LINE OF LOTS 8 AND 7, BLOCK B, RESPECTIVELY, TO THE SOUTHWEST CORNER OF AFORESAID LOT 7; THENCE RUN N00°04'32"E., 379.96 FEET ALONG THE WEST LINE OF LOTS 7, 6, 3, AND 2, RESPECTIVELY, BLOCK B, TO THE NORTH LINE OF ORANGE HEIGHTS; THENCE ALONG SAID NORTH LINE OF ORANGE HEIGHTS RUN S89°53'13"E., 544.68 FEET TO THE POINT OF BEGINNING.

CONTAINING 5.56 ACRES, MORE OR LESS.

This property is to be reclassified from Industrial (City) to Commercial (City) and contains 5.56 acres, more or less:

AND WHEREAS, the City is proposing to amend the Future Land Use Map to include the future land use of property that shall pertain and be applicable to said amendment.

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

SECTION 1. The adopted local Comprehensive Plan and Future Land Use Map for the City of Wildwood, Florida, are hereby amended to include the above-referenced property and proposed land use amendment as indicated above. The amendment to the Future Land Use Map of the local comprehensive plan is attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 2. All ordinances or parts of ordinances in conflict herewith, be, and the same are hereby repealed.

SECTION 3. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 4. This Ordinance shall take effect 31 days after its final reading by the City Commission of the City of Wildwood.

DONE AND ORDAINED this _____ day of _____, 2023, by the City Commission of the City of Wildwood, Florida.

CITY COMMISSION
CITY OF WILDWOOD, FLORIDA

Ed Wolf, Mayor

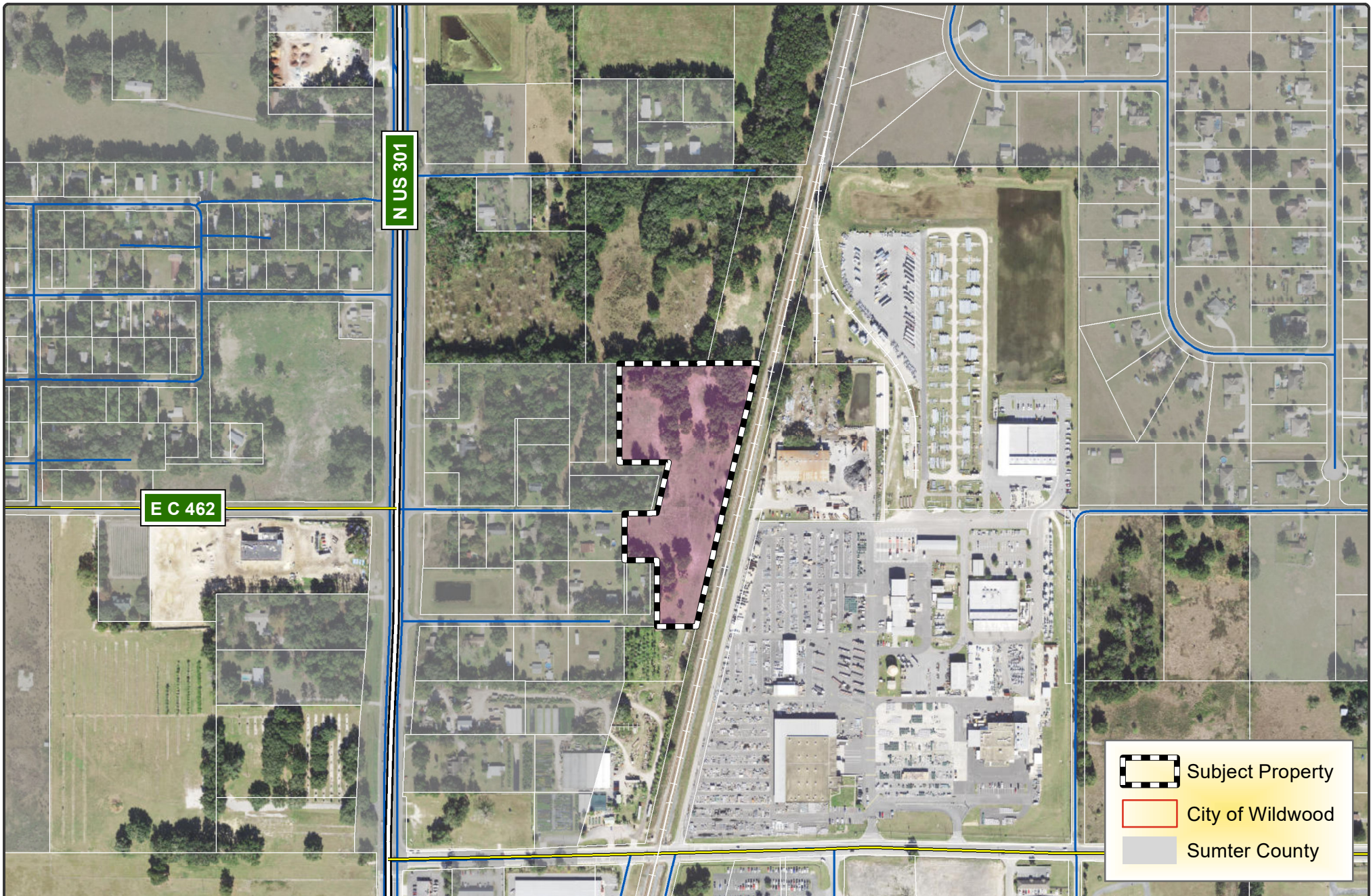
ATTEST: _____
Susan Patterson, City Clerk

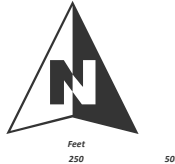
First Reading: _____

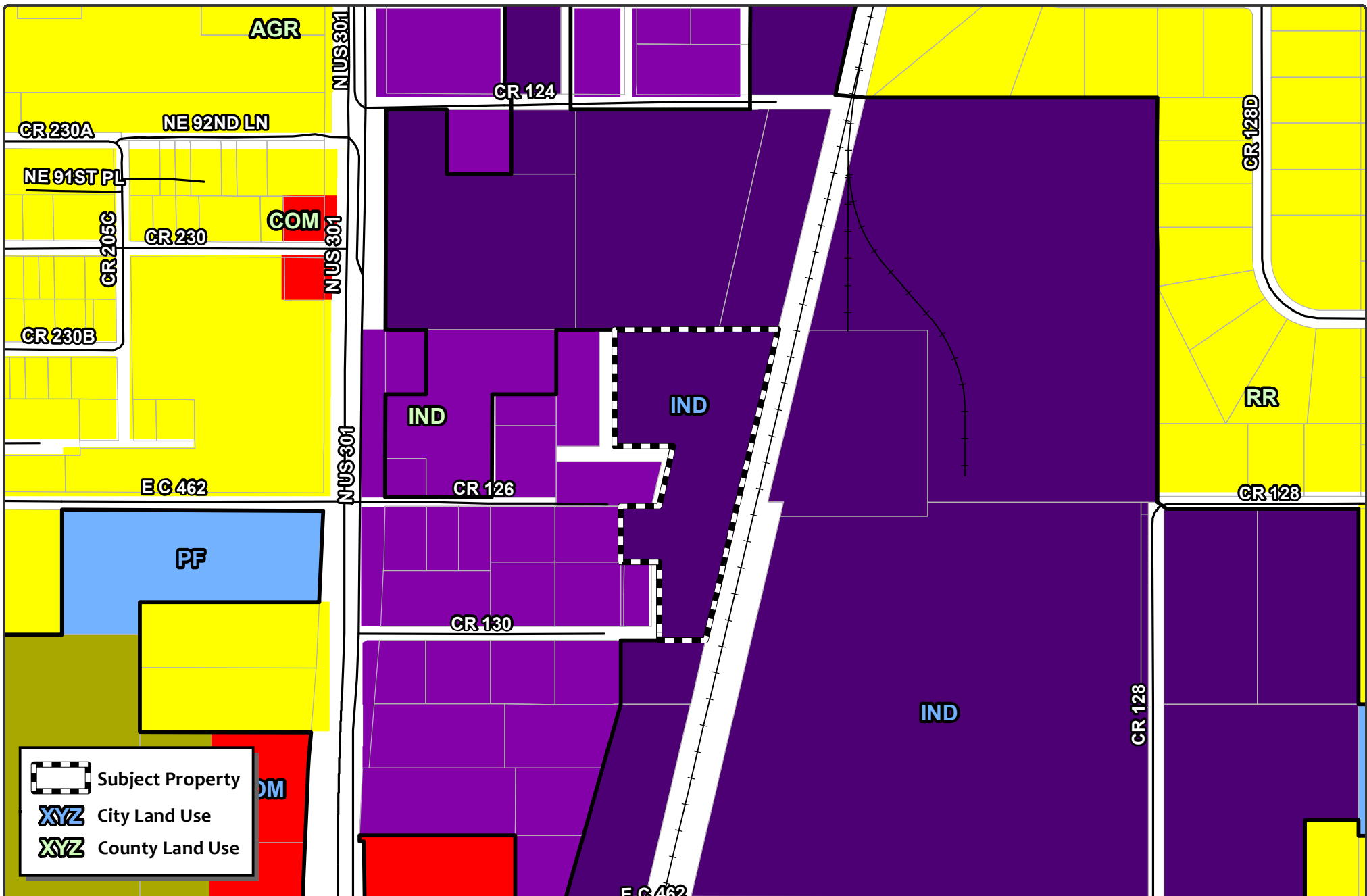
Second Reading: _____

Approved as to form:

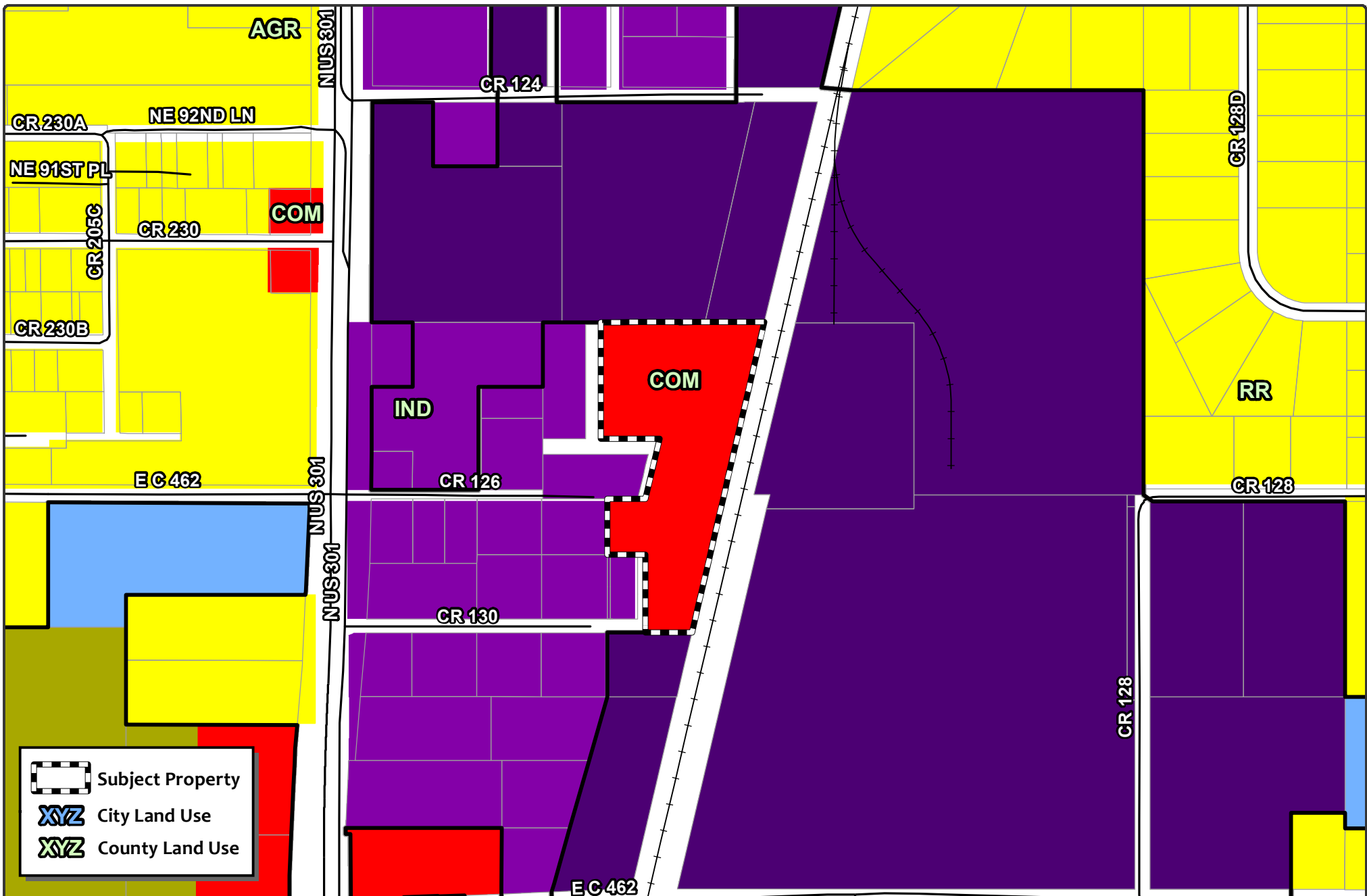
City Attorney



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 Feet 0 250 500	CP 2304-001 HOUSE OF HOPE PARCEL D29B001	MAP 1B LOCATION MAP MAY 2023
--	--	---	--	--



 Subject Property
 City Land Use
 County Land Use



City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate
as Local Planning Agency

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate as the Local Planning Agency for a Comprehensive Plan amendment to amend the FLU map designation from Industrial (City) to Commercial (City) on 5.56 acres MOL.

Case No: CP 2304-001 House of Hope

Applicant: Mary Starkey

Owner: Coniglio C. John Trustee

Parcel Number(s): D29B001

Under Land Development Regulation (LDR) § 1.7(C), the Planning and Zoning Board/Special Magistrate as Local Planning Agency has a duty to make a recommendation to the City Commission on all proposed Comprehensive Plan amendments.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 1.7(D), the Special Magistrate recommends approval of the Comprehensive Plan amendment and gives a favorable recommendation of Ordinance O2023-22 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: RZ 2304-002 House of Hope

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance Number O2023-23 subject to approval of O2023-22, which establishes a Future Land Use appropriate to the proposed zoning.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case #	RZ 2304-002 House of Hope
Ordinance #	O2023-23
Applicant	Mary Starkey
Owners	Coniglio C. John Trustee
Property Location	Generally located along CR 126, approximately 0.17 miles east of the intersection of N US 301 and E C 462
Parcel Number(s)	D29B001
Date	6/19/2023

The applicant is seeking approval from the City Commission for a Zoning Map Amendment to change the zoning district from M-1 (City) to C-3 (City) for the parcel listed above on 5.56 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment CP 2304-001 (O2023-22)

ANALYSIS: The applicant proposes the development of a rehabilitation facility consisting of an administration building, lodging building, future warehouse, thrift store, and a future training building to provide temporary counseling services and skills training.

Pursuant to Land Development Regulation (LDR) § 3.3(C)(4), staff believes the zoning change to C-3 should be granted based on the following criteria:

(a) Whether the proposed change is consistent with the comprehensive plan;

The proposed rezoning to COM is consistent with the proposed Future Land Use Map designation of Commercial (COM) and the intent of the Comprehensive Plan as stated in FLU policy 1.2.8.f. and policy 1.2.8.g. These policies state that the city shall foster distinctive neighborhoods with a strong sense of place, and the preservation of open space. Surrounding

parcels, specifically those to the east, are currently primarily zoned M-1 for light industrial. However, the surrounding area to the southwest and west is composed of a mix of uses, with both R-5 residential and C-3 commercial parcels.

(b) The existing land use pattern of the surrounding area;

The land use pattern of the surrounding area is a mix of residential, commercial, and industrial. The proposed C-3 zoning designation will follow policy 1.2.8.I. which seeks to maintain compatibility with adjacent land uses. As well as policy 1.2.8.a. which states that the city should contribute to a mix of land uses that are compatible with existing communities. The proposed development would conform with the existing land use pattern and would fit within the existing FLUM.

(c) The possibility of adversely affecting public facilities such as schools, utilities, streets, etc;

Schools:

The proposed development is commercial and is not intended to add any new students to the Wildwood school system.

Potable Water & Sewer:

There is an existing 10" water main along the railroad tracks to the east of the parcel, as well as a 6" force main. The subject properties are in an infill demand service area according to the 2019 Utility Master Plan. City water and sewer are available to the subject property. The applicant/owner will work with City utilities at the site plan stage to connect to City water and sewer.

Streets:

The applicant has submitted a traffic statement from Springstead Engineering dated April 06, 2023. Access to the property is proposed from the west side of the parcel, using CR 126, which will be extended to fulfill the needs of the development. The traffic impact statement provided shows 2 a.m. peak hour trips and 2 p.m. peak hour trips, from the proposed development. A full traffic analysis will not be required as the average daily trip does not exceed fifty (50).

(d) Whether changed or changing conditions make the passage of the proposed amendment necessary;

The applicant (House of Hope) has operated a program to assist at-risk population since 2014. Due to the sale of the original site where they had been leasing, a new campus is needed to return operations to full capacity. The proposed facility will temporarily house at-risk populations while providing work and study programs for effective re-integration into the general populace. The amendment is necessary to allow the applicant to restart their operations and provide these beneficial services to the community.

(e) Whether the proposed change will create or excessively increase traffic congestion or otherwise be a detriment to public safety;

The property will generate approximately four (4) daily trips, so this will not excessively increase traffic. Additionally, the traffic generated does not meet the threshold where a full transportation impact analysis (TIA) would be necessary.

(f) Whether the proposed change will be a deterrent to the improvement or development of adjacent property;

The proposed rezoning will not be a deterrent to the improvement or development of adjacent properties. Surrounding properties are permitted to develop in accordance with their zoning map designation. While properties that remain in Sumter County's jurisdiction are allowed to develop according to their jurisdiction's future land use and zoning designations.

ZONING DESIGNATION

SURROUNDING PROPERTIES

NORTH	M-1 (City)
SOUTH	R4C (County) M-1 (City)
EAST	M-1 (City)
WEST	R4C & CL (County)

If the rezoning is approved, the applicant will be required to submit a site plan to the City prior to development. The site plan will need to follow requirements established in the City's Land Development Regulations and the Design District Standards as well as any Planned Development Agreements or Developer's Agreements that may be needed.



Shaun Raja,
Planner I, Development Services Department

ORDINANCE NO. O2023-23

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA;
PROPOSING A ZONING MAP AMENDMENT TO THE
OFFICIAL ZONING MAP IN ACCORDANCE WITH
SECTIONS 3.2 AND 3.3 OF THE LAND DEVELOPMENT
REGULATIONS; PROVIDING FOR CODIFICATION;
PROVIDING FOR CONFLICT; PROVIDING FOR
SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE
DATE.

WHEREAS, the City of Wildwood, Florida, is proposing to amend the Official Zoning Map of said City, to include a rezoning of real property described as follows, to-wit:

Parcel(s) D29B001
Coniglio C. John Trustee (Owner)
5.56 Acres +/-

LEGAL DESCRIPTION:

A PARCEL OF LAND IN THE WEST ½ OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST AND IN THE NORTHWEST ¼ OF THE NORTHWEST ¼ OF SECTION 32, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, AND LYING WESTERLYLY OF C.S.X. TRANSPORTATION, INC'S WESTERLY RIGHT OF WAY LINE, SAID PARCEL BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT A POINT ON THE NORTH LINE OF THE SOUTHEAST ¼ OF THE SOUTHWEST ¼ OF AFORESAID SECTION 29, SAID POINT BEING 50.00 FEET WEST (AS MEASURED AT RIGHT ANGLES) OF THE CENTERLINE OF C.S.X. TRANSPORTATION, INC.'S MAIN LINE TRACK; FROM SAID POINT, RUN S13°15'50"W PARALLEL WITH AND 50.00 FEET FROM THE CENTERLINE OF SAID WESTERLY TRACK; 789.24 FEET, TO THE NORTH LINE OF LOT 1, BLOCK A, ORANGE HEIGHTS SUBDIVISION, PLAT BOOK 3, PAGE 25, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA FOR THE POINT OF BEGINNING; THENCE CONTINUE S13°15'50"W PARALLEL WITH AND 50.00 FEET FROM THE CENTERLINE OF SAID WESTERLY TRACK, 591.50 FEET; THENCE DEPARTING SAID PARALLEL LINE RUN S89°54'37"W, 264.69 FEET TO A POINT ON THE EASTERLY EXTENSION OF THE NORTH LINE OF LOT 4, BLOCK D, ORANGE HEIGHTS, AND TO THE CENTERLINE OF MARCIA STREET IN AFORESAID ORANGE HEIGHTS; THE FOLLOWING TWO (2) COURSES BEING ALONG SAID CENTERLINE OF MARCIA STREET; RUN N00°23'55"E., 2.95 FEET; THENCE N13°33'07"E., 199.37 FEET TO A POINT ON THE EASTERLY EXTENSION OF THE SOUTH LINE OF LOT 8, BLOCK B, ORANGE HEIGHTS; THENCE RUN N89°51'23"W., 191.52 FEET ALONG SAID EXTENSION LINE AND SOUTH LINE OF LOTS 8 AND 7, BLOCK B, RESPECTIVELY, TO THE SOUTHWEST CORNER OF AFORESAID LOT 7; THENCE RUN N00°04'32"E., 379.96 FEET ALONG THE WEST LINE OF LOTS 7, 6, 3, AND 2, RESPECTIVELY, BLOCK B, TO THE NORTH LINE OF ORANGE HEIGHTS; THENCE ALONG SAID NORTH LINE OF ORANGE HEIGHTS RUN S89°53'13"E., 544.68 FEET TO THE POINT OF BEGINNING.

CONTAINING 5.56 ACRES, MORE OR LESS.

This property is to be reclassified from M-1 (City) to C-3 (City) containing 5.56 acres, more or less;

AND WHEREAS, the rezoning is consistent with the City's Comprehensive Plan and Land Development Regulations.

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

SECTION 1. The Official Zoning Map of the City of Wildwood, Florida is hereby amended to include the above-referenced property as indicated above. The amendment to the Official Zoning Map is attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 2. All ordinances or parts of ordinances in conflict herewith, be, and the same are hereby repealed.

SECTION 3. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 4. This Ordinance shall take effect 31 days after its final reading by the City Commission of the City of Wildwood.

DONE AND ORDAINED this _____ day of _____, 2023, by the City Commission of the City of Wildwood, Florida.

CITY COMMISSION
CITY OF WILDWOOD, FLORIDA

Ed Wolf, Mayor

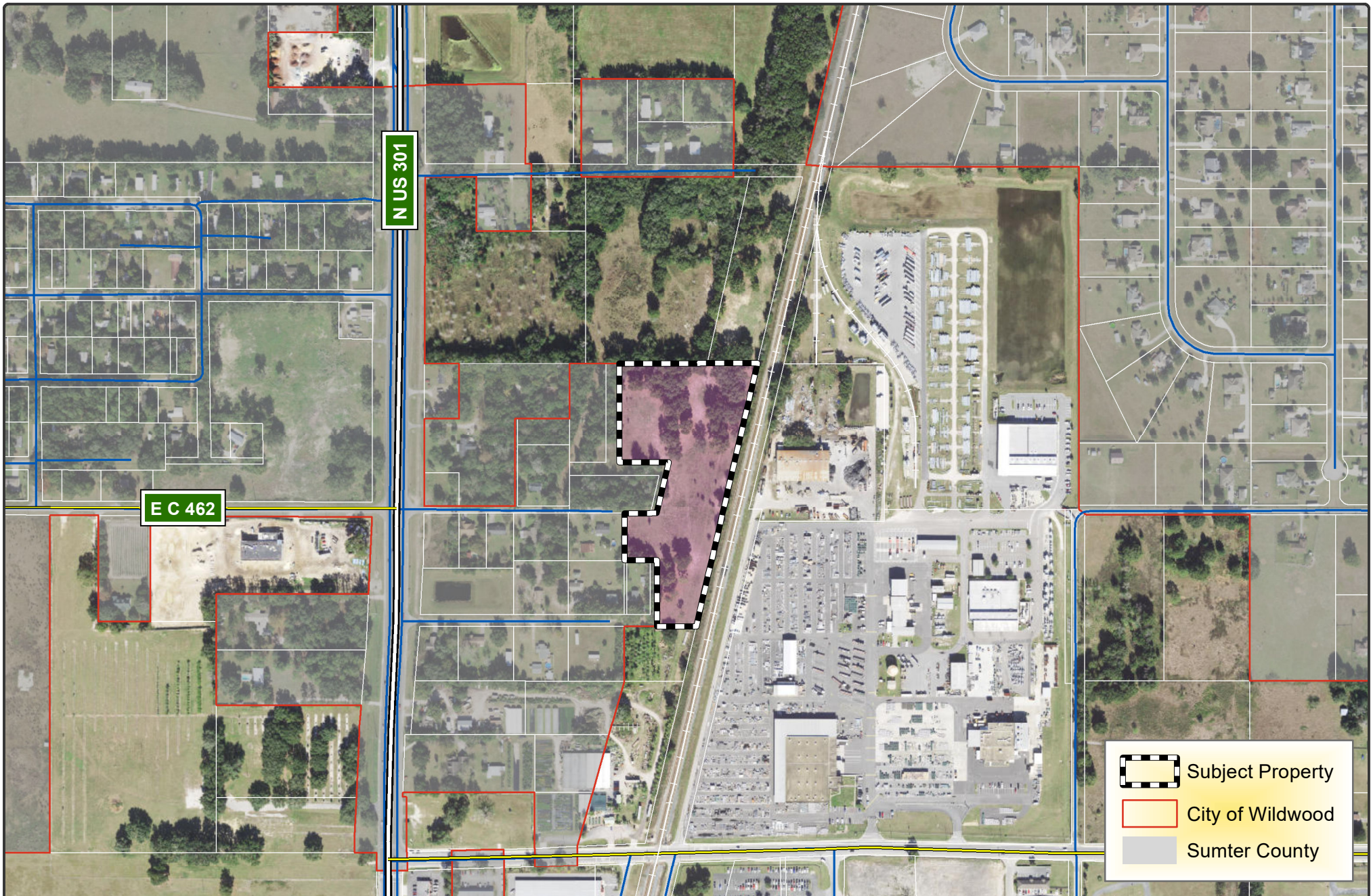
ATTEST: _____
Susan Patterson, City Clerk

First Reading: _____

Second Reading: _____

Approved as to form:

City Attorney



**CITY OF
WILDWOOD**

100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



RZ 2304-002

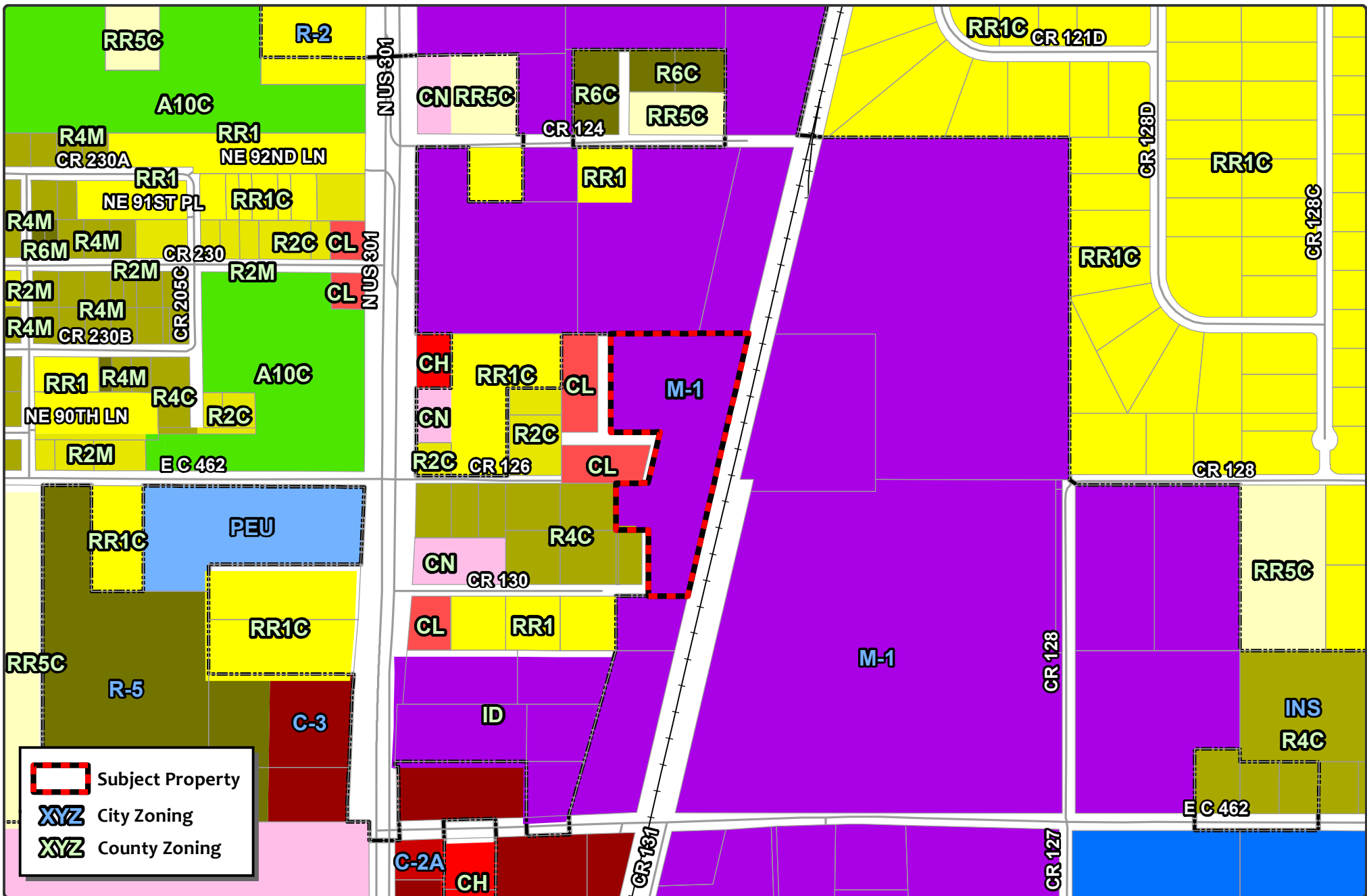
HOUSE OF HOPE

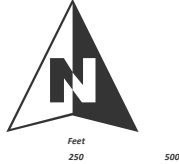
PARCEL D29B001

MAP 1B

**LOCATION
MAP**

**MAY
2023**



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov		RZ 2304-002		MAP 3A
			HOUSE OF HOPE		CURRENT ZONING
			PARCEL D29B001		MAY 2023

City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for a Zoning Map Amendment to change the zoning district from M-1 (City) to C-3 (City) on 5.56 acres MOL.

Case # RZ 2304-002 House of Hope

Applicant Mary Starkey

Owner Coniglio C. John Trustee

Parcel Number(s) D29B001

Under Land Development Regulation (LDR) § 1.7(B)(2), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed Zoning Map amendments.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 1.7(D), the Special Magistrate recommends approval of the Zoning Map amendment and gives a favorable recommendation of Ordinance O2023-23 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: CP 2303-002 All County Collision

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance Number O2023-25.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case No.:	CP 2303-002 All County Collision
Ordinance No.:	O2023-25
Applicant:	Florida Metal Buildings - William Poole
Owner:	Cecil L. Teboe, Robert S. Teboe, Louis M. Teboe, Jerry T. Teboe & Henry J. Thrower
Property Location:	East of N US 301 and approximately 0.25 miles north of E C466
Parcel Number(s):	D08A001
Date:	June 7, 2023

The applicant is seeking approval from the City Commission for a Small Scale Comprehensive Plan Amendment to change the Future Land Use Map designation from Rural Residential (Sumter County) to Commercial (City) for the parcels listed above on 1.97 acres MOL. This request is accompanied by rezoning request RZ 2303-004.

Staff believes the proposed amendment should be granted based on the following criteria found in Land Development Regulation (LDR) §1.7(D).

(1) Justification of the proposed amendment has been adequately presented;

The applicant has submitted adequate justification to the City of Wildwood for the proposed request to change the Future Land Use from Rural Residential (Sumter County) to Commercial (City), as supported in the 2050 Comprehensive Plan Amendment Policy 1.1.1.c. The proposed land use amendment would allow for the construction of a new auto collision center, on 1.97 acre MOL. Policy 1.1.1.c is intended to support a mix of commercial and office uses.

(2) The proposed amendment is not inconsistent with the goals, objectives and policies of the comprehensive plan;

The proposed amendment is not inconsistent with the goals, objectives and policies of the comprehensive plan, with the proposed land use change from Rural Residential (Sumter County) to Commercial (City). Policy 1.1.1.c. supports the proposed land use change, which is intended to accommodate a mix of commercial and office uses. The maximum intensity is

0.5 Floor Area Ratio (FAR) or 75% Impervious Surface Ratio (ISR), whichever number is less. The maximum FAR for the development is 42,906.6 square feet and the development proposes a 20,000-square-foot facility, which meets the criteria of the proposed land use.

(3) The proposed amendment should not be considered urban sprawl or exemplify an energy inefficient land use pattern;

The amendment is not considered urban sprawl, and it does not exemplify an energy inefficient land use pattern. The subject property is located along N US 301. Utilities are available to the site on the west side of N US 301. Policy 1.2.1 states "The City shall encourage growth and development in areas where public infrastructure, services, and utilities are already present or planned to be within 3 to 5 years. As the existing mix of land use designations are mainly Low-Density Residential (LDR) and Commercial (COM), an addition of High-Density Residential (HDR) would conform with Objective 1.2 of the Comprehensive Plan. The proposed development directly combats urban sprawl by focusing on maximizing existing space for compact development, providing a wider more efficient land use in the area.

(4) The proposed amendment will not have an adverse effect on environmentally sensitive systems;

The proposed amendment will not have an adverse effect on environmentally sensitive systems. An environmental survey was conducted by Woodlands Management in April of 2023. Per the survey, no listed species were observed on the site.

(5) The proposed amendment will not adversely affect transportation, potable water, sewer, schools or other public facilities without providing remedies to correct the system or facility.

Transportation:

The property has access off of N US 301 and NE 120th Road. The applicant has applied for an exemption for the TIA submittal which was granted by Sumter County Public Works, due to the site producing less than 50 trips per day.

Potable Water & Sewer: The subject properties are in an infill demand service area according to the 2019 Utility Master Plan. City water and sewer are available to the subject property. The applicant/owner will work with City utilities at the site plan stage to connect to City water and sewer.

Schools: The commercial development will not generate any school-age children.



Terri O'Neal, CCM
Planning Manager, Development Services

ORDINANCE NO. O2023-25

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROPOSING A SMALL SCALE FUTURE LAND USE MAP AMENDMENT TO THE ADOPTED COMPREHENSIVE PLAN AND FUTURE LAND USE MAP IN ACCORDANCE WITH THE COMMUNITY PLANNING ACT OF 2011, AS AMENDED; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City of Wildwood, Florida, is proposing to amend the local Comprehensive Plan and Future Land Use Map of said City, to include a land use amendment described as follows, to-wit:

Parcel D08A001
Cecil L. Teboe, Robert S. Teboe, Louis M. Teboe, Jerry T. Teboe & Henry J. Thrower (Owners)
1.97 +/-

LEGAL DESCRIPTION:

LOTS 1 TO 8 INC BLK A & LOTS 2 3 6 7 10 11 14 15 & 16 AND W 20 FT LOT 13 BLK H SS CARUTHERS ADD TO OXFORD PB 1 PG 122 LESS 301 R/W LESS A PORT OF LOTS 2 & 3 BLK S.S. CARUTHERS ADD TO OXFORD PB 1 PG 122 DESC AS FOLLOWS: COMM AT SE COR OF LOT 1 BLOCK H BEING ON NORTHERN R/W OF NE 120TH XING THENCE N/LY WESTERN LINE OF 100 FT RR R/W 136.73 FT TO POB THENCE LEAVING R/R R/W ON A LINE PARALLEL WITH NORTH ERN R/W XING AN ANGLE OF 101 DEG 28'27"W TO NORTH A DIST OF 111.10 FT TO PT ON THE WESTERN LINE OF LOT 3 BLK H THENCE AN ANGLE OF 90 DEG 00'00"E TO NORTH ALONG THE WESTERN LINE OF LOT 3 BLK H 20.00 FT THENCE LEAVING THE WESTERN LINE OF LOT 3 BLK 5 AT AN ANGLE OF 95 DEG 19'4"E NORTH A DIT 105.51 FT TO A PT ON WESTERN R/W LINE OF 100 FT R/R THENCE S/LY ALONG SAID R/R R/W 30.41 FT TO POB

This property is to be reclassified from Rural Residential (Sumter) to Commercial (City).

AND WHEREAS, the City is proposing to amend the Future Land Use Map to include the future land use of property that shall pertain and be applicable to said amendment.

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

SECTION 1. The adopted local Comprehensive Plan and Future Land Use Map for the City of Wildwood, Florida, are hereby amended to include the above-referenced property and proposed land use amendment as indicated above. The amendment to the Future Land Use Map of the local comprehensive plan is attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 2. All ordinances or parts of ordinances in conflict herewith, be, and the same are hereby repealed.

SECTION 3. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 4. This Ordinance shall take effect 31 days after its final reading by the City Commission of the City of Wildwood.

DONE AND ORDAINED this _____ day of _____, 2023, by the City Commission of the City of Wildwood, Florida.

CITY COMMISSION

CITY OF WILDWOOD, FLORIDA

Ed Wolf, Mayor

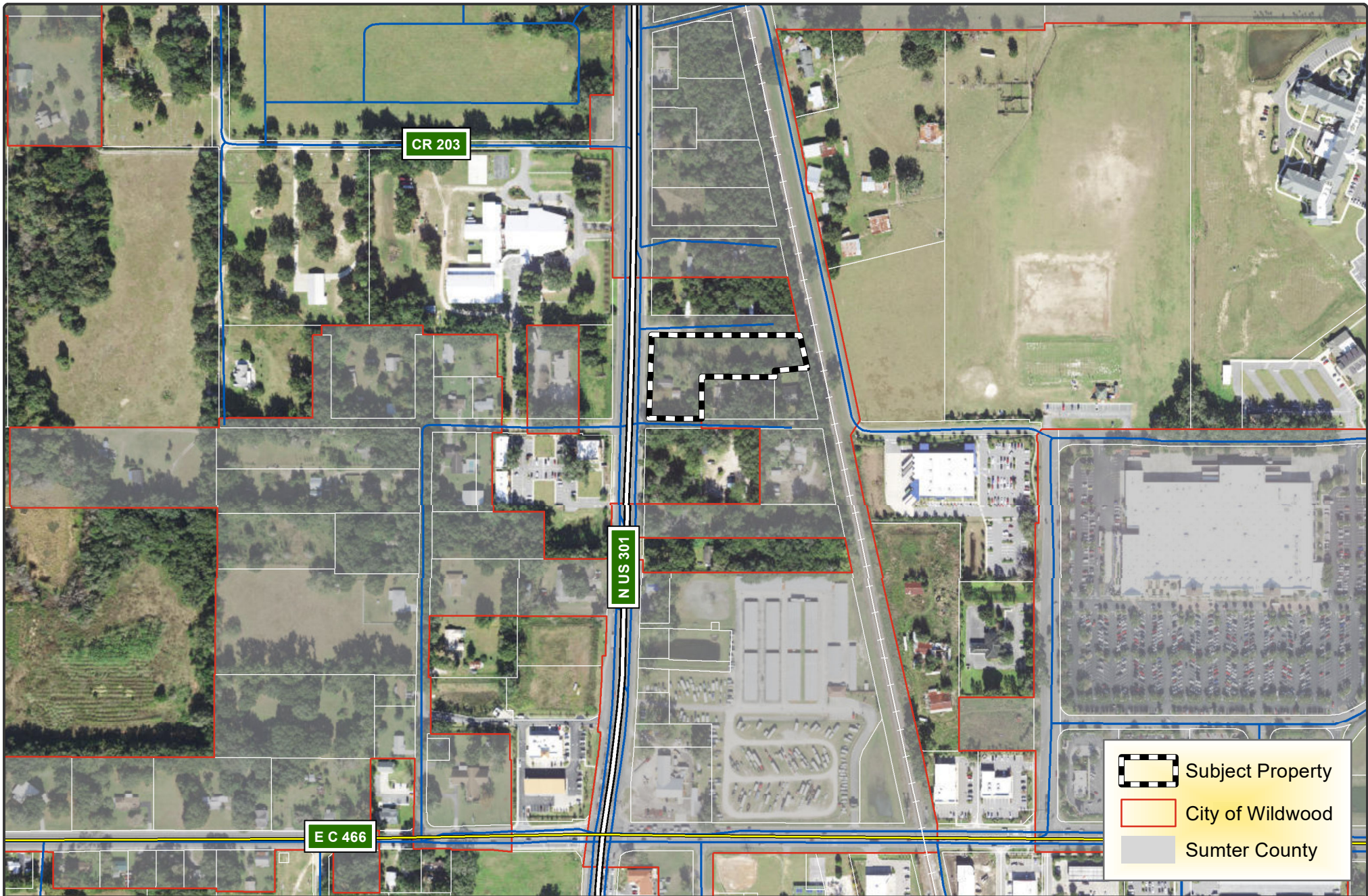
ATTEST: _____
Susan Patterson, City Clerk

First Reading: _____

Second Reading: _____

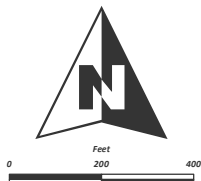
Approved as to form:

City Attorney



**CITY OF
WILDWOOD**

100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



CP 2303-002/RZ 2303-004

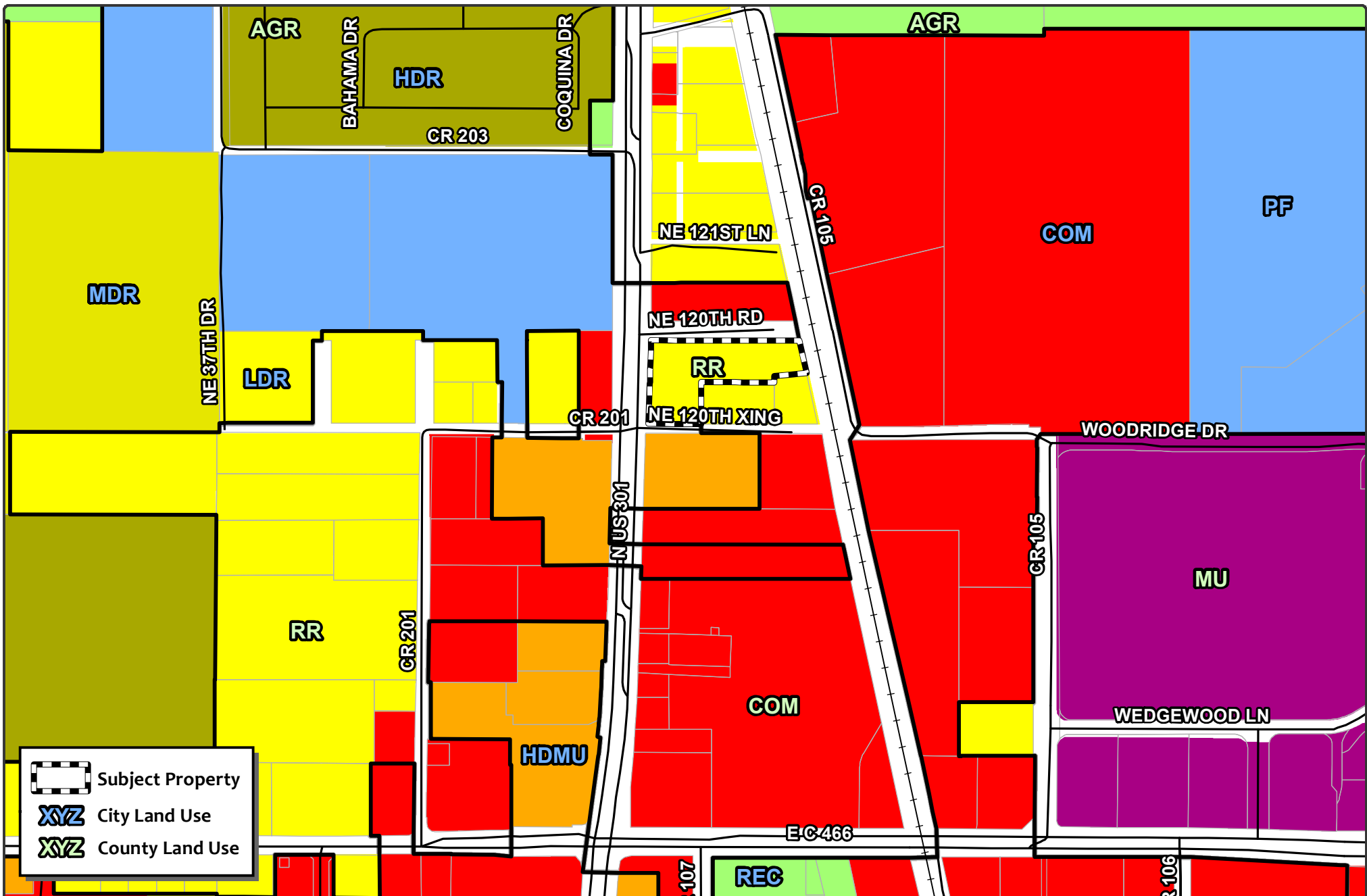
ALL COUNTY COLLISION

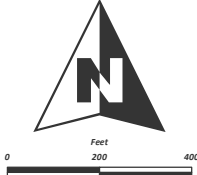
PARCEL D08A001

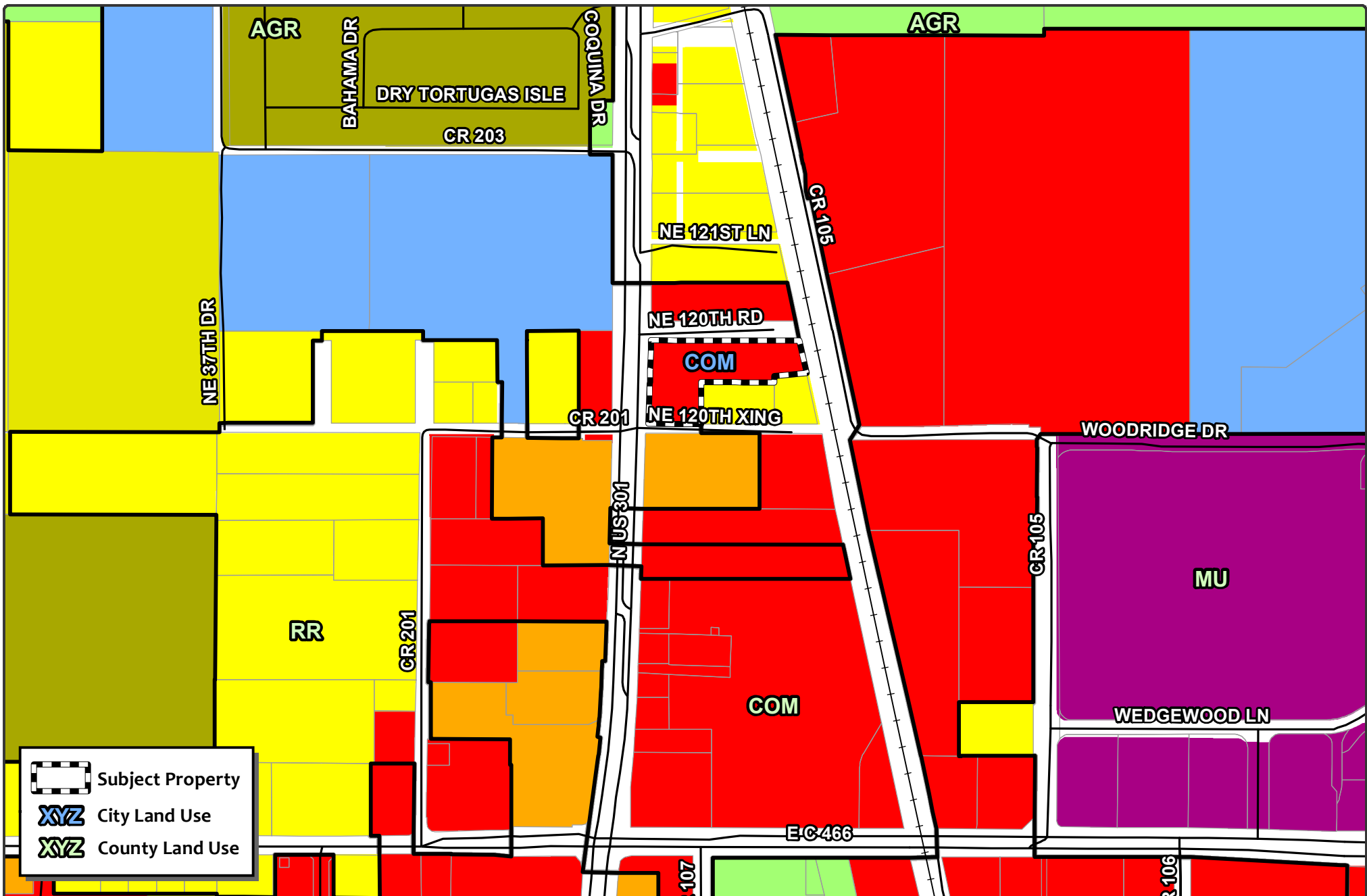
MAP 1B

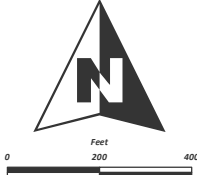
**LOCATION
MAP**

**MAY
2023**



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 Feet 0 200 400	CP 2303-002 ALL COUNTY COLLISION PARCEL D08A001	MAP 2A EXISTING LAND USE MAY 2023



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov		CP 2303-002 ALL COUNTY COLLISION PARCEL D08A001		MAP 2B PROPOSED LAND USE MAY 2023

City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate
as Local Planning Agency

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate as the Local Planning Agency for a Comprehensive Plan amendment to amend the FLU map designation from Rural Residential (Sumter County) to Commercial (City) on 1.97 acres MOL.

Case No: CP 2303-003 All County Collision

Applicant: Florida Metal Buildings

Owners: Cecil L. Teboe, Robert S. Teboe, Louis M. Teboe, Jerry T. Teboe & Henry J. Thrower

Parcel Number: D08A001

Under Land Development Regulation (LDR) § 1.7(C), the Planning and Zoning Board/Special Magistrate as Local Planning Agency has a duty to make a recommendation to the City Commission on all proposed Comprehensive Plan amendments.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 1.7(D), the Special Magistrate recommends approval of the Comprehensive Plan amendment and gives a favorable recommendation of Ordinance O2023-25 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: RZ 2303-004 All County Collision

REQUESTED ACTION: Special Magistrate recommends approval of Ordinance Number O2023-26 (attached) subject to approval of O2023-25, which establishes a Future Land Use appropriate to the proposed zoning.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

CASE NO.:	RZ 2303-004 All County Collision
ORDINANCE NO.:	O2023-26
APPLICANT:	Florida Metal Buildings - William Poole
OWNERS:	Cecil L. Teboe, Robert S. Teboe, Louis M. Teboe, Jerry T. Teboe & Henry J. Thrower
PROPERTY LOCATION:	East of N US 301 and approximately 0.25 miles north of E C466
PARCEL NUMBER(S):	D08A001
DATE:	June 7, 2023

The applicant is seeking approval from the City Commission for a Zoning Map Amendment to change the zoning district from RR1 (Sumter County) to C-3 (City) for the parcel listed above on 1.97 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment CP 2303-002 (O2023-25).

ANALYSIS: The applicant is proposing a new 20,000-square-foot auto collision center.

Pursuant to Land Development Regulation (LDR) § 3.3(C)(4), staff believes the zoning change to C-3 should be granted based on the following criteria:

(a) Whether the proposed change is consistent with the comprehensive plan;

The proposed rezoning to C-3 is consistent with the proposed Future Land Use Map designation of Commercial (COM) and the intent of the Comprehensive Plan as stated in Policy 1.1.1.c.

(b) The existing land use pattern of the surrounding area;

The land use pattern of the surrounding area is a mix of residential and commercial uses. The proposed C-3 zoning designation will serve as a transition in this area to serve city residents.

(c) The possibility of adversely affecting public facilities such as schools, utilities, streets, etc;

Schools:

The commercial development will not generate any school-age children.

Potable Water & Sewer:

There is an existing 8" water main and a 4" force main on the east side of N US 301. The owner will need

to work with the City to service the property with utilities.

Streets:

The property has access off of N US 301 and NE 120th Road. The applicant has applied for an exemption for the TIA submittal which was granted by Sumter County Public Works, due to the site producing less than 50 trips per day.

(d) Whether changed or changing conditions make the passage of the proposed amendment necessary:

The subject property proposes

(e) Whether the proposed change will create or excessively increase traffic congestion or otherwise be a detriment to public safety:

The applicant has applied for and received an exemption from Sumter County Public Works. The proposed development will generate less than 50 trips a day to the site.

(f) Whether the proposed change will be a deterrent to the improvement or development of adjacent property:

The proposed rezoning will not be a deterrent to the improvement or development of adjacent properties. Surrounding properties are permitted to develop in accordance with their zoning map designation.

ZONING DESIGNATION SURROUNDING PROPERTIES	
NORTH	C-3 (City)
SOUTH	466/301 Mixed Used (City)
EAST	R2M (County) & C-3 (City)
WEST	C-3 (City)

If the rezoning is approved, the applicant will be required to submit a site plan to the City prior to development. The site plan will need to follow requirements established in the City's Land Development Regulations and the Design District Standards as well as any Planned Development Agreements or Developer's Agreements that may be needed.

DATED: 06/07/2023



Terri O'Neal, CCM
Planning Manager, Development Services

ORDINANCE NO. 02023-26

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA;
PROPOSING A ZONING MAP AMENDMENT TO THE
OFFICIAL ZONING MAP IN ACCORDANCE WITH
SECTIONS 3.2 AND 3.3 OF THE LAND DEVELOPMENT
REGULATIONS; PROVIDING FOR CODIFICATION;
PROVIDING FOR CONFLICT; PROVIDING FOR
SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE
DATE.

WHEREAS, the City of Wildwood, Florida, is proposing to amend the Official Zoning Map of said City, to include a rezoning of real property described as follows, to-wit:

Parcel D08A001
Cecil L. Teboe, Robert S. Teboe, Louis M. Teboe, Jerry T. Teboe & Henry J.
Thrower (Owners)
1.97 +/-

LEGAL DESCRIPTION:

LOTS 1 TO 8 INC BLK A & LOTS 2 3 6 7 10 11 14 15 & 16 AND W 20 FT LOT 13 BLK H SS CARUTHERS ADD TO OXFORD PB 1 PG 122 LESS 301 R/W LESS A PORT OF LOTS 2 & 3 BLK S.S. CARUTHERS ADD TO OXFORD PB 1 PG 122 DESC AS FOLLOWS: COMM AT SE COR OF LOT 1 BLOCK H BEING ON NORTHERN R/W OF NE 120TH XING THENCE N/LY WESTERN LINE OF 100 FT RR R/W 136.73 FT TO POB THENCE LEAVING R/R R/W ON A LINE PARALLEL WITH NORTH ERN R/W XING AN ANGLE OF 101 DEG 28'27"W TO NORTH A DIST OF 111.10 FT TO PT ON THE WESTERN LINE OF LOT 3 BLK H THENCE AN ANGLE OF 90 DEG 00'00"E TO NORTH ALONG THE WESTERN LINE OF LOT 3 BLK H 20.00 FT THENCE LEAVING THE WESTERN LINE OF LOT 3 BLK 5 AT AN ANGLE OF 95 DEG 19'4"E NORTH A DIT 105.51 FT TO A PT ON WESTERN R/W LINE OF 100 FT R/R THENCE S/LY ALONG SAID R/R R/W 30.41 FT TO POB

This property is to be reclassified from RR1 (Sumter) to C-3 (City).

AND WHEREAS, the rezoning is consistent with the City's Comprehensive Plan and Land Development Regulations.

NOW, THEREFORE, BE IT ENACTED AND ORDAINED by the City Commission of the City of Wildwood, Florida, as follows:

SECTION 1. The Official Zoning Map of the City of Wildwood, Florida is hereby amended to include the above-referenced property as indicated above. The amendment to the Official Zoning Map is attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 2. All ordinances or parts of ordinances in conflict herewith, be, and the same are hereby repealed.

SECTION 3. If any section, sentence, clause or phrase of this Ordinance is held to be invalid or unconstitutional by a Court or competent jurisdiction, then said holding shall in no way effect the validity of the remaining portions of said Ordinance.

SECTION 4. This Ordinance shall take effect 31 days after its final reading by the City Commission of the City of Wildwood.

DONE AND ORDAINED this _____ day of _____, 2023, by the City Commission of the City of Wildwood, Florida.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

Ed Wolf, Mayor

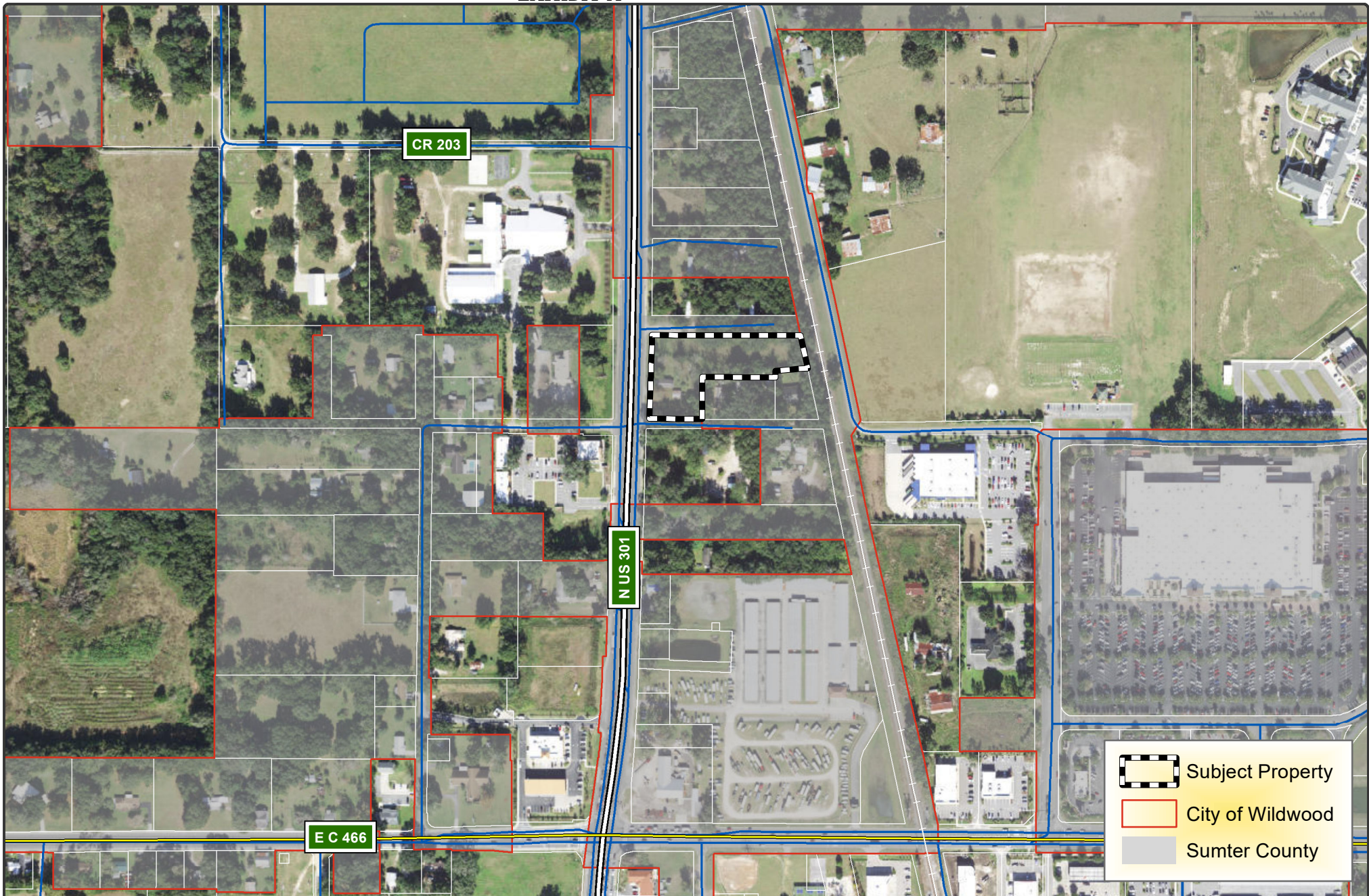
ATTEST: _____
Susan Patterson, City Clerk

First Reading: _____

Second Reading: _____

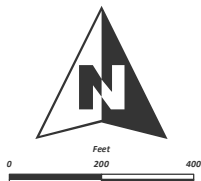
Approved as to form:

City Attorney



**CITY OF
WILDWOOD**

100 North Main Street
Wildwood, FL 34785
Phone: (352) 330-1330
www.wildwood-fl.gov



RZ 2303-004

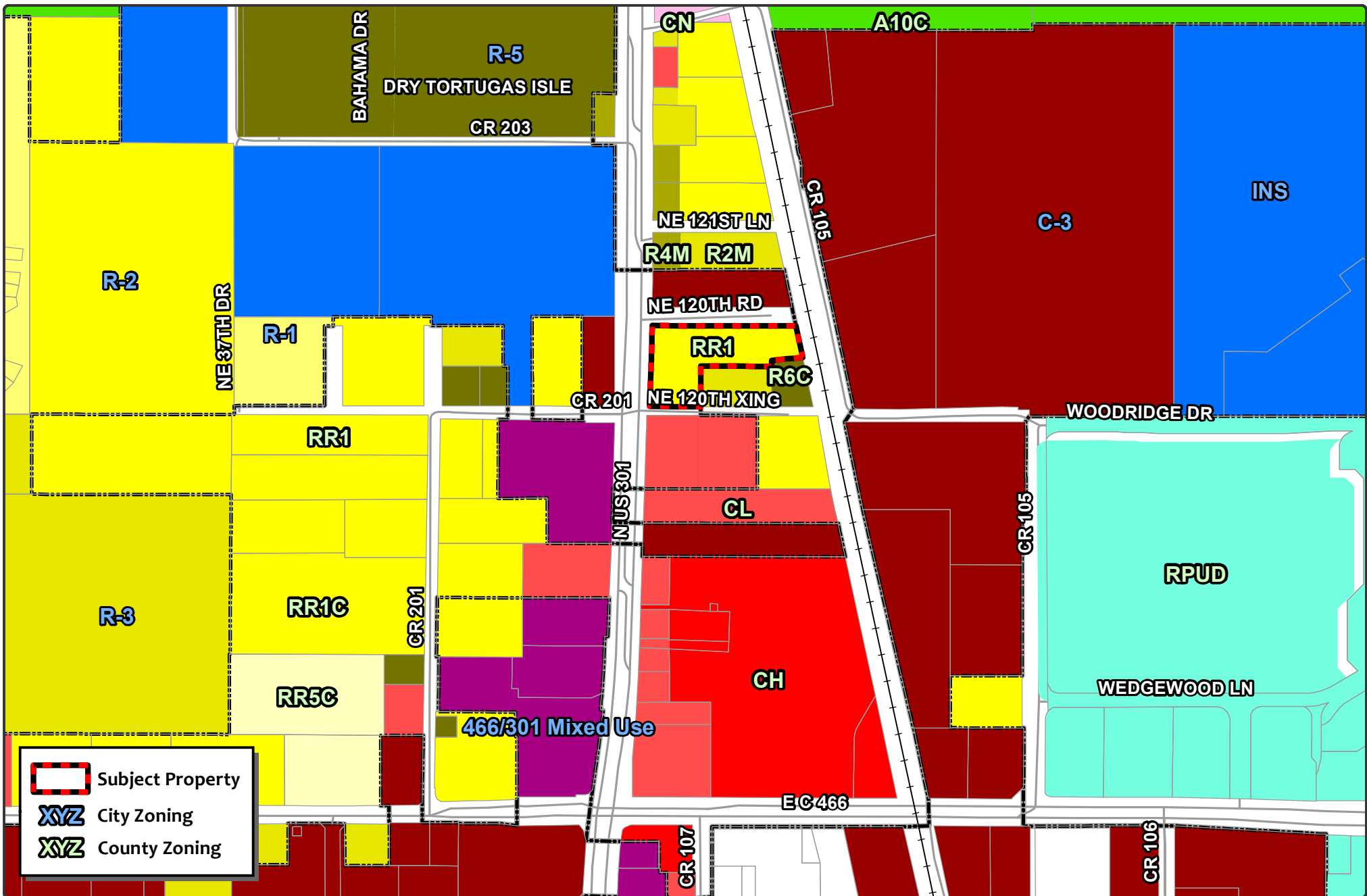
ALL COUNTY COLLISION

PARCEL D08A001

MAP 1B

**LOCATION
MAP**

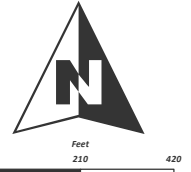
**MAY
2023**

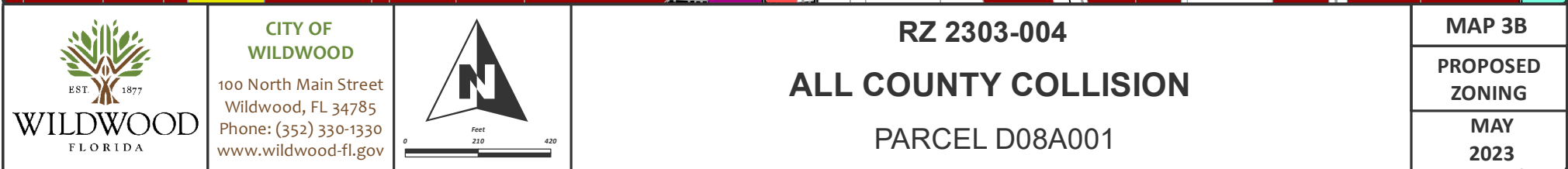


 Subject Property

 City Zoning

 County Zoning

 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov		RZ 2303-004 ALL COUNTY COLLISION PARCEL D08A001	MAP 3A CURRENT ZONING MAY 2023



City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, June 13, 2023, by the Special Magistrate. The applicant seeks approval and favorable recommendation from the City of Wildwood Planning and Zoning Board/Special Magistrate for a Zoning Map Amendment to change the zoning district from RR1 (Sumter County) to C-3 (City) on 1.97 acres MOL.

Case: RZ 2303-004 All County Collision

Parcel: D08A001

Owners: Cecil L. Teboe, Robert S. Teboe, Louis M. Teboe, Jerry T. Teboe & Henry J. Thrower

Applicant: Florida Metal Buildings

Under Land Development Regulation (LDR) § 1.7(B)(2), the Planning and Zoning Board/Special Magistrate has a duty to make a recommendation to the City Commission on all proposed Zoning Map amendments.

Based upon the testimony, evidence, and information presented as to the criteria set forth in LDR § 1.7(D), the Special Magistrate recommends approval of the Zoning Map amendment and gives a favorable recommendation of Ordinance O2023-26 to the City Commission for final determination.

Dated: June 13, 2023



Lindsay C.T. Holt
Special Magistrate City of Wildwood

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Waste Management Rate Adjustment

REQUESTED ACTION: Staff recommends approval.

CONTRACT: Vendor/Entity: Waste Management
Effective Date: July 2023 Termination Date:
Managing Division/Department:

BUDGET IMPACT: No budget impact.

HISTORY/FACTS/ISSUES:

In 2022, a fuel surcharge was added to the user charge for solid waste disposal services due to increased fuel costs. The increase was in accordance with the contract the City has with Waste Management. Due to lower fuel costs in recent months, Waste Management has informed the City that the fuel surcharge should be removed from the fees paid by residents. This resolution removes the fuel surcharge. It is important to note that this is not a component of the rate for solid waste disposal services; the rate itself remains the same, but residents will see a \$.22 decrease in their bill for solid waste services due to the removal of the fuel surcharge.

RESOLUTION NO. R2023-12

A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF WILDWOOD, FLORIDA PROVIDING FOR DECREASES TO THE SOLID WASTE USER CHARGE; RESCINDING RESOLUTION NO. R2023-4; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City has contracted with Waste Management to provide for solid waste disposal service; and,

WHEREAS, the contract provides that Waste Management can request a semi-annual rate adjustment based on fuel costs; and,

WHEREAS, the City of Wildwood is the authority who sets the price for solid waste disposal services; and,

WHEREAS, Waste Management has requested that the current fuel surcharge be removed from the billing charge for solid waste disposal service.

NOW THEREFORE, BE IT RESOLVED, by the City Commission of the City of Wildwood, Florida:

SECTION 1. The rate for solid waste user charges shall be revised as indicated in Exhibit "A".

SECTION 2. These rates and charges supersede any previous rates established by the City Commission of the City of Wildwood, Florida.

SECTION 3. With the passage of the Resolution the new rates will become effective as of the billing cycle for the month of July 2023.

DONE AND RESOLVED this ____ day of _____, 20____, by the City Commission of the City of Wildwood, Florida.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

Ed Wolf, Mayor

ATTEST: _____
Susan Patterson, City Clerk

Exhibit "A"

City of Wildwood Rates Effective 7/01/23 through 9/31/23

Container Size (Dumpster)	Extra Dump	2 Dumps Per week	3 Dumps Per week	4 Dumps Per week	5 Dumps Per week	6 Dumps Per week
2 cubic yds	\$9.05	\$69.67	\$104.51	\$139.35	\$174.19	\$209.02
Fuel Surcharge	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Rate	\$9.05	\$69.67	\$104.51	\$139.35	\$174.19	\$209.02
4 cubic yds	\$16.99	\$136.58	\$204.86	\$273.15	\$341.44	\$409.73
Fuel Surcharge	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Rate	\$16.99	\$136.58	\$204.86	\$273.15	\$341.44	\$409.73
6 cubic yds	\$24.92	\$201.22	\$301.84	\$402.45	\$503.06	\$603.68
Fuel Surcharge	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Rate	\$24.92	\$201.22	\$301.84	\$402.45	\$503.06	\$603.68
8 cubic yds	\$31.57	\$256.51	\$384.77	\$513.03	\$641.28	\$769.55
Fuel Surcharge	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Rate	\$31.57	\$256.51	\$384.77	\$513.03	\$641.29	\$769.55

Container Size Roll-Offs	Per Pull Charges on Open Top Containers				
	Fuel Surcharge		Total Rate		
20 yd	\$ 220.15	\$ 6.48	\$ 226.63	plus tipping fees	
30 yd	\$ 239.60	\$ 6.48	\$ 246.08	plus tipping fees	
40 yd	\$ 259.04	\$ 6.48	\$ 265.52	plus tipping fees	

Compactor Size Rolloff	Per Pull Charges				
	Fuel Surcharge		Total Rate		
20 yd	\$ 317.37	\$ 6.48	\$ 323.85	plus tipping fees	
30 yd	\$ 382.15	\$ 6.48	\$ 388.63	plus tipping fees	
35 yd	\$ 427.50	\$ 6.48	\$ 433.98	plus tipping fees	
40 yd	\$ 479.35	\$ 6.48	\$ 485.83	plus tipping fees	

Service Type	1st Cart Monthly	Limb Debris Pickup/Disposal	Monthly Fee	2nd Cart Monthly	3rd Cart Monthly
Residential/ Inside City	\$16.28	\$3.08	\$19.36	\$11.57	\$11.57
Fuel Surcharge	\$0.00		\$0.00	\$0.00	\$0.00
Total Rate	\$16.28	\$3.08	\$19.36	\$11.57	\$11.57
Residential/ Outside City	\$24.54	NA	\$24.54	\$14.83	\$14.83
Fuel Surcharge	\$0.00		\$0.00	\$0.00	\$0.00
Total Rate	\$24.54	\$0.00	\$24.54	\$14.83	\$14.83
Commercial/ Inside City	\$25.08	\$ 8.09	\$25.08	\$11.57	\$11.57
Fuel Surcharge	\$0.00	per CY	+\$8.18 per CY	\$0.00	\$0.00
Total Rate	\$25.08	\$8.09	\$25.08	\$11.57	\$11.57
Commercial/ Outside City	\$31.22	\$10.19	\$31.22	\$14.83	\$14.83
Fuel Surcharge	\$0.00	per CY	+\$10.28 per CY	\$0.00	\$0.00
Total Rate	\$31.22	\$10.19	\$31.22	\$14.83	\$14.83

Note: Minimum Commercial Dumpster Service is 2X/Week

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: RFP No. 2023-10 Property and Casualty Insurance Program

REQUESTED ACTION:

CONTRACT:

Vendor/Entity: Brown & Brown

Effective Date: 10/01/23

Termination Date:

Managing Division/Department: Executive

BUDGET IMPACT: Premium will be budgeted in the FY24 budget. Property & Casualty Insurance is budgeted evenly between General Fund and Enterprise Fund. Work Comp Insurance is distributed by department.

HISTORY/FACTS/ISSUES:

In April 2023, the City put out an RFP for the Property and Casualty Insurance Program services. Two responses were received; one from Brown and Brown of Florida, Inc. and the other from World Risk Management. The selection committee for this RFP consisted of Human Resources Director/Risk Manager Melissa Tuck, Information Technology Director Paul Ketz, and Assistant City Manager/CFO Cassandra Smith. On Thursday, May 25th, the selection committee met to discuss and score the proposals. While Brown & Brown did score higher in this initial review, the committee members felt a need to request presentations from both companies to clarify the contents of the proposals. The firms were asked to be prepared to discuss the following items: windstorm sub-limits, higher deductible options, take-home automobile coverage and exclusions on the automobile coverage, annual aggregates, claims vs. occurrence basis coverage, and defense costs in relation to the aggregate limit.

On Tuesday, June 6th, the selection committee met with each company to discuss their proposals and get clarification on specific coverages. Following the conclusion of the two meetings, the committee met to discuss and score the proposals. Despite Brown & Brown's proposal being more costly than World Risk Management, scoring of the proposals in this round resulted in Brown & Brown scoring higher than World Risk Management. The committee member discussion highlighted key reasons outweighing the price as the primary factor in choosing an insurance program. As submitted, the World Risk Management proposal provided insurance on a claims-made basis while the Brown & Brown proposal provided insurance on an occurrence basis. The occurrence basis covers claims which occur during a policy period, regardless of when they are reported; the claims-made basis covers claims that occur and are reported during a policy period, therefore the coverage is not as thorough. The importance of this is even greater if the City were to want to leave a program designed as a claims-made basis as it would require the purchase of a separate policy that would cover any claims that arise following the transition to the new program.

While the price of the World Risk Management proposal was less than the Brown & Brown proposal and also offered a two-year rate guarantee if the City's incurred loss ratio was maintained at less than 30%, the committee members did not feel that this guaranteed a lower cost. Brown & Brown explained that the rate guarantee is different than a premium guarantee.

As values increase, premiums will be assessed at the same rate as proposed, but are added to the overall premium. It would be expected to pay additional premiums for new acquisitions of equipment, vehicles, property, etc. However, the representatives indicated that at the beginning of the initial policy period, they would conduct an appraisal of all property, and also stated that based on their experience with Preferred Governmental Insurance Trust (PGIT) customers, property values are generally very undervalued. To the committee members, this meant that the appraisal would likely result in a substantial increase in value, and therefore a substantial increase in premium while still guaranteeing the rate hold. Therefore the committee members did not feel that the first-year cost savings would continue to be realized over the course of the policy program.

Another consideration discussed by the selection committee was the size of the pools of each company. Brown & Brown works with PGIT, which currently has approximately 370 members. World Risk Management works with Public Risk Management of Florida, which currently has approximately 70 members. The committee felt that a larger pool is more advantageous in that a catastrophic loss can be spread over more members.

While both companies demonstrated exceptional ancillary services and customer service relationships, the selection committee felt that the issues identified above were important to the needs of the City of Wildwood and recommend that the Commission award the City's Property and Casualty Insurance Program to Brown & Brown.

CITY OF WILDWOOD
PROJECT NAME: Property Casualty Insurance
RANKING



RFP #2023-10

Project Name: Property & Casualty Insurance Program

	Melissa Tuck	Paul Ketz	Cassandra Smith	Total Points	Ranking
APPLICANTS					
<u>Brown & Brown</u>	95	88	93	276	1
<u>World Risk Management</u>	75	80	91	246	2



CITY OF WILDWOOD

INITIAL EVALUATION

Project: Property & Casualty Insurance Program
RFP# 2023-10

Name: Melissa Tuck Date: 5.25.23

Notes: Companies were asked to provide the following information		COMPLIANCE W/RFP				
1) Cost - Tab C. 2) Quality : Quality of Proposed Insurance Products. 3) Services : Services including Customer Service, Claims Management Services, Safety/Loss Control Services and Other Ancillary Services (Tab D). 4) Experience : Experience and Public Sector References (Tab E). 5) Financial Stability : Financial Stability of Insurer (Tab C).		Cost	Quality	Services	Experience	Financial Stability
APPLICANTS		30 pts	30 pts	15 pts	15 pts	10 pts
						100 pts possible
Brown & Brown		25	30	15	15	10
						950
World Risk Management		30	20	10	10	5
						750



CITY OF WILDWOOD

INITIAL EVALUATION

Project: Property & Casualty Insurance Program
RFP# 2023-10

Paul Ketz

Name:

5/24/23

Date:

Notes: Companies were asked to provide the following information	COMPLIANCE W/RFQ					
1) Cost - Tab C. 2) Quality : Quality of Proposed Insurance Products. 3) Services : Services including Customer Service, Claims Management Services, Safety/Loss Control Services and Other Ancillary Services (Tab D). 4) Experience : Experience and Public Sector References (Tab E). 5) Financial Stability : Financial Stability of Insurer (Tab C).						
	Cost	Quality	Services	Experience	Financial Stability	Total Points
APPLICANTS	30 pts	30 pts	15 pts	15 pts	10 pts	100 pts possible
Brown & Brown	18	30	15	15	10	88 0
World Risk Management	30	25	10	10	5	80 0



CITY OF WILDWOOD

INITIAL EVALUATION

Project: Property & Casualty Insurance Program
RFP# 2023-10

Name: Cassandra Smith

Date: 5/25/23

Notes: Companies were asked to provide the following information	COMPLIANCE W/RFP					
1) Cost - Tab C. 2) Quality : Quality of Proposed Insurance Products. 3) Services : Services including Customer Service, Claims Management Services, Safety/Loss Control Services and Other Ancillary Services (Tab D). 4) Experience : Experience and Public Sector References (Tab E). 5) Financial Stability : Financial Stability of Insurer (Tab C).	Cost	Quality	Services	Experience	Financial Stability	Total Points
APPLICANTS	30 pts	30 pts	15 pts	15 pts	10 pts	100 pts possible
Brown & Brown	25	29	14	15	10	93
World Risk Management	30	24	12	15	10	91

CITY OF WILDWOOD
PROJECT NAME: Property Casualty Insurance
PRESENTATION RANKING



RFP #2023-10

Project Name: Property & Casualty Insurance Program

	Melissa Tuck	Paul Ketz	Cassandra Smith	Total Points	Ranking
APPLICANTS					
<u>Brown & Brown</u>	95	90	91	276	1
<u>World Risk Management</u>	80	80	89	249	2



CITY OF WILDWOOD

Property & Casualty Insurance Program

PRESENTATION EVALUATION

M. Trick

Name:

10.6.23

Date:

RFP# 2023-10

	COMPLIANCE W/RFP					
	Price	Deductibles	Quality of Products	Ancillary Services Offered	Total Points	Rank
1. Price. Overall pricing of the proposed insurance package. 2. Deductibles. Cost of claims via deductibles. 3. Quality of Products. Considerations such as exclusions, sub-limits, occurrence vs. claims basis, aggregate limits. 4. Ancillary Services Offered. Additional services available to City such as training, HR & Law Enforcement consultations, Cyber-Security program, etc.						
APPLICANTS	25 pts	30 pts	30 pts	15 pts.	100 pts possible	100 pts possible
<u>Brown & Brown</u>	<i>20</i>	<i>30</i>	<i>30</i>	<i>15</i>	<i>95</i> <i>0</i>	<i>1</i>
<u>World Risk Management</u>	<i>25</i>	<i>25</i>	<i>20</i>	<i>10</i>	<i>80</i> <i>0</i>	<i>1</i>



CITY OF WILDWOOD

Property & Casualty Insurance Program

PRESENTATION EVALUATION

Paul Ketz

Name:

6/6/23

Date:

RFP# 2023-10

	COMPLIANCE W/RFP				Total Points	Rank
	Price	Deductibles	Quality of Products	Ancillary Services Offered		
1. Price. Overall pricing of the proposed insurance package. 2. Deductibles. Cost of claims via deductibles. 3. Quality of Products. Considerations such as exclusions, sub-limits, occurrence vs. claims basis, aggregate limits. 4. Ancillary Services Offered. Additional services available to City such as training, HR & Law Enforcement consultations, Cyber-Security program, etc.						
APPLICANTS	25 pts	30 pts	30 pts	15 pts.	100 pts possible	100 pts possible
Brown & Brown	15	30	30	15	0	90 1
World Risk Management	25	25	20	10	0	80 1

Paul M. Zeff



CITY OF WILDWOOD

Property & Casualty Insurance Program

PRESENTATION EVALUATION

Name: Cassandra Smith Date: 6/6/23

RFP# 2023-10

	COMPLIANCE W/RFP				Total Points	Rank
	Price	Deductibles	Quality of Products	Ancillary Services Offered		
1. Price. Overall pricing of the proposed insurance package. 2. Deductibles. Cost of claims via deductibles. 3. Quality of Products. Considerations such as exclusions, sub-limits, occurrence vs. claims basis, aggregate limits. 4. Ancillary Services Offered. Additional services available to City such as training, HR & Law Enforcement consultations, Cyber-Security program, etc.						
APPLICANTS	25 pts	30 pts	30 pts	15 pts.	100 pts possible	100 pts possible
Brown & Brown	20	28	28	15	91	1
World Risk Management	25	25	26	13	89	2

RFP COVER PAGE

Name of Firm, Entity or Organization:	Brown & Brown of Florida, Inc.
Federal Employer Identification Number (FEIN):	59-0691921
State of Florida License Number (If Applicable):	
Name of Contact Person:	Scott Hindman
Title:	Senior Vice President
E-Mail Address:	Scott.Hindman@bbrown.com
Mailing Address:	1300 Citizens Blvd Suite 100 Leesburg, FL 34748
Street Address (if different):	
City, State, Zip:	
Telephone: (352) 431-3100	Fax: (352) 787-9922
Organizational Structure – Please Check One:	
Corporation ☒ Partnership ☐ Proprietorship ☐ Joint Venture ☐ Other ☐	
If Corporation:	
Date of Incorporation: 04/03/1947	State of Incorporation: Florida
States Registered in as Foreign Corporation:	
Authorized Signature:	
Print Name:	Scott T. Hindman
Signature:	
Title:	Senior Vice President
Phone:	(352) 431-3100
<i>This document must be completed and returned with your Submittal.</i>	



RFP # 2023-10

Property and Casualty Insurance Program

Response Prepared By:

Brown & Brown of Florida, Inc.

Scott T. Hindman, CIC – Senior Vice President
1300 Citizens Blvd. Suite 100
Leesburg, FL 34748
(352) 431-3100

Submittal Date: May 16, 2023, at 11:00 AM



Table of Contents

	<u>Page</u>
Tab A: Statement of Interest	4
Statement of Interest Letter	5-6
Tab B: Vendor Profile	7
Form 1: Vendor Profile	8
Brown & Brown Current Business License	9
Tab C: Proposal Submittal Form	10
Proposal Submittal Form	11-16
Tab D: Claims Management Services and Ancillary Services	17
Preferred Services Guide 2023	18-31
Tab E: References	32
References Form	33
Tab F: Additional Information	34
Preferred Organizational Structure	35
Preferred Board of Trustees	36
Letter from the Preferred Board of Trustees Chair	37
Preferred Overview	37-43
Liability Defense Panel	44
Workers' Compensation Defense Panel	45
Coverage Advantages	46
2023 Preparedness Guide	47-62
Tab G: Additional Required Documents	63
Proposer's Certification / Addenda Acknowledgement Form	64
Proposals Form for City of Wildwood	65
Statement of Terms and Conditions	66
Hold Harmless Agreement	67
Drug-Free Workplace Certification	68
Public Entity Crimes Form	69-70
Conflict of Interest Disclosure Form	71
City of Wildwood Package Policy COI 10/01/2022-10/01/2023	72
City of Wildwood Workers' Comp Policy COI 10/01/2022-10/01/2023	73
E-Verify Document	74
Qualifications Summary	75

Tab A

Statement of Interest

May 9, 2023

City Hall
City of Wildwood
100 N Main Street
Wildwood, Florida 34748

Re: RFP # 2023-10 – Property and Casualty Insurance Program

On behalf of Brown & Brown, I am pleased to submit our response to the RFP for the City's Property and Casualty Insurance Program. We trust that you will find the response contained herein to be concise in demonstrating our understanding of the City's solicitation for a qualified professional insurance firm.

Throughout this response, our approach revolves around three main objectives:

1. **Provide the Best Value Property and Casualty Program**
2. **Deliver Effective and Efficient Claims Management and Loss Control Support**
3. **Utilize Local Resources to Best Serve the City and its Residents**

Brown & Brown is uniquely qualified to provide the services outlined in this RFP. Our firm has served the risk management needs of Florida's public entities for more than 30 years.

Our team currently represents more than 100 Florida Cities, Counties, School Districts, Sheriff's Offices, and Special Taxing Districts.

We have consistently grown our book of business because we have consistently improved our services and bolstered our reputation with innovative solutions for our clients. Our ability to exceed our clients' expectations is evidenced by our client retention rate of 97%. Our knowledge base, service commitment, regional expertise, and local presence in Florida make our firm exceptionally prepared to exceed the City's service expectations. It is our intent to demonstrate that service commitment as well as our firm's willingness and ability to provide the City's requested services as outlined in this RFP response.

Our service team includes local, regional, and national experts that will deliver the very best results possible.

Most importantly, we ask you to take special note of the references included in this response. Our written response to the RFP does not speak as loud as those for whom we have delivered exceptional year-over-year results. **We challenge you to call our references, ask probing questions, and determine for yourself the real-world impact of our expertise, proactive service commitment, and dedication to the continuous improvement of our client's risk management programs.**

The person authorized to make representations for Brown & Brown is Mr. Scott Hindman. Contact information for Mr. Hindman is as follows:

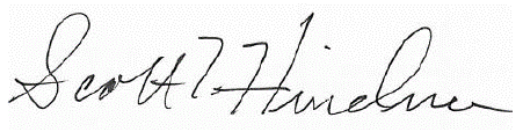
Scott Hindman, Senior Vice President
1300 Citizens Blvd Suite 100
Leesburg, FL 34748
Email: Scott.Hindman@bbrown.com
Direct: (352) 431-3100
Fax: (352) 787-9922

Enclosed are all required documents and information. Every effort was made to concisely provide all requested information, all required completed forms, and succinctly illustrate our understanding and our ability to provide the required scope of services as well as other services outlined in this response.

We are available at the request of the City to participate in any oral interviews. Please feel free to contact me should you need further clarification of our proposal.

Please consider this signed document as evidence that this proposal is in all respects fair and in good faith without collusion or fraud. There are no conflicts of interest arising out of any other clients, contracts, or interests associated with this project. The signer has the authority to bind the principal proponent.

Sincerely,



Scott T. Hindman, CIC
Senior Vice President

Tab B

Vendor Profile

FORM 1

“VENDOR” PROFILE

Submitted by (Company Name): Brown & Brown of Florida, Inc.

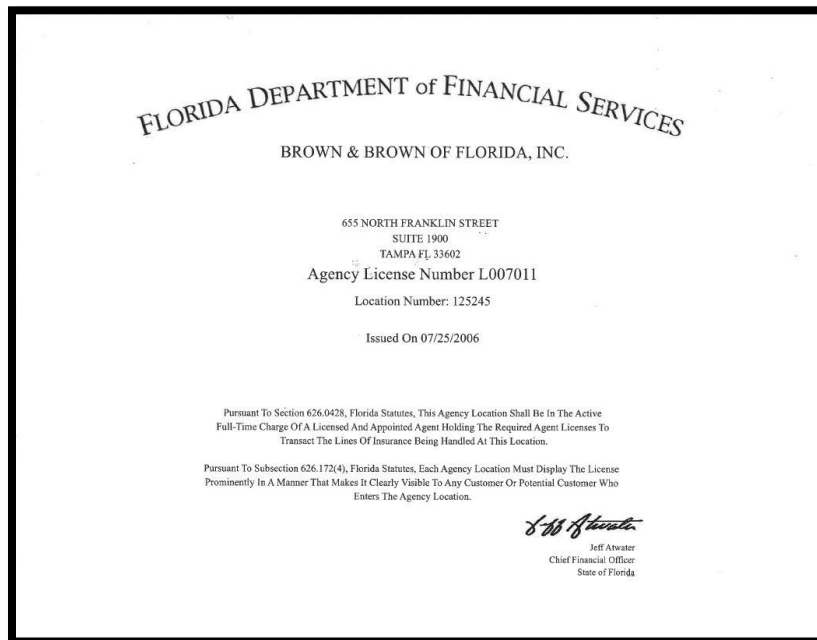
 Corporation	Partnership	Individual	Joint Venture
Other	Describe:		
Florida Contractor License Number:		Expiration Date:	
Office Location: 1300 Citizens Blvd Suite 100 Leesburg, FL (Headquarters: 300 North Beach St Daytona Beach, FL)			
Number of people in your organization: 150 Central Florida Teammates / 15,000+ Teammates Worldwide			
Length of time the Contractor has been doing business under this name in Florida:		years	
Length of time your firm has provided services to governmental clients:		30+ years	
Under what other name(s) has your firm operated: Please see below			
Has or is your firm currently involved in any formal court proceedings regarding any of your contracts? Please see below			
YES	(attach a detailed explanation)		NO

Brown & Brown is a global firm that maintains a disciplined focus on acquiring companies that fit culturally and make sense financially. As mergers & acquisitions are finalized, our new locations and teammates are added into the family of companies under the Brown & Brown name.

The Leesburg office of Brown & Brown is not and has not been involved in any formal court proceedings regarding any of our contracts.

The company is involved in numerous pending or threatened proceedings by or against Brown & Brown, Inc. or one or more of its subsidiaries that arise in the ordinary course of business. The damages that may be claimed against the Company in these various proceedings are in some cases substantial, including in many instances claims for punitive or extraordinary damages. Some of these claims and lawsuits have been resolved, others are in the process of being resolved and others are still in the investigation or discovery phase. The Company will continue to respond appropriately to these claims and lawsuits and to vigorously protect its interests.

Current Business License



Tab C

Proposal Submittal Form

PROPOSAL SUBMITTAL FORM

Coverage		Limit	Deductible	Higher Ded Option
Property	Buildings & Contents	\$46,510,931	\$1,000 AOP/ 5% NS	\$25k AOP
	New Locations	\$2,000,000	\$1,000 AOP/ 5% NS	\$25k AOP
	Accounts Receivable	\$500,000	\$1,000 AOP/ 5% NS	\$25k AOP
	Business Income	\$500,000	\$1,000 AOP/ 5% NS	\$25k AOP
	Boiler and Machinery	\$46,510,931	\$1,000	\$25k AOP
	Errors and Omissions	\$250,000	\$1,000 AOP/ 5% NS	\$25k AOP
	Additional Expense	\$1,000,000	\$1,000 AOP/ 5% NS	\$25k AOP
	Demolition & Increased Cost of Construction	\$500,000	\$1,000 AOP/ 5% NS	\$25k AOP
	Windstorm	\$46,510,931	5% NS / \$35k min.	Same
	Flood	\$5,000,000	\$1,000	\$25k AOP
Total Premium			\$262,330	\$240,814

Proposed Agent/Broker: Brown & Brown of Florida, Inc.

Proposed Insurer: Preferred Governmental Insurance Trust (PGIT)

Insurer A.M. Best Rating: N/A - All Excess Carriers are A.M. Best A Rated or Higher

Will coverage be provided on a Guaranteed Replacement Cost Basis?

Buildings Yes X No _____

Personal Property Yes X No _____

Contractors/Mobile Equipment Yes X No _____

Boiler and Machinery Yes X No _____

Can replacement structures be built on alternative sites? Yes X No _____

Will there be additional premium for newly acquired properties? Yes _____ No X

Is Coinsurance % Required? If so, please provide percentage. Yes _____ No X

Is there a sub-limit for windstorm coverage? Yes _____ No X

How are appurtenant structures and/or property in the open to be covered?

Property in the Open is either scheduled or coverage does apply for unscheduled PITO within 1,000 ft of a scheduled location

List all locations that will be **excluded** for windstorm and hail.

All locations listed on your property schedule include windstorm and hail coverage.

	Coverage	Limit	Deductible
INLAND MARINE	Blanket Unscheduled Inland Marine	\$1,000,000	\$1,000
	Scheduled Inland Marine	\$780,606	\$5,000
	Total Premium		\$11,806

Proposed Agent/Broker: Brown & Brown of Florida, Inc.

Proposed Insurer: Preferred Governmental Insurance Trust (PGIT)

Insurer A.M. Best Rating: N/A - All Excess Carriers are A.M. Best A Rated or Higher

	Coverage	Limit	Deductible
CRIME	Forgery and Alteration	\$250,000	\$1,000
	Theft, Disappearance or Destruction	\$250,000	\$1,000
	Computer Fraud/Funds Transfer Fraud	\$250,000	\$1,000
	Employee Dishonesty	\$250,000	\$1,000
	Total Premium		\$621

Proposed Agent/Broker: Brown & Brown of Florida, Inc.

Proposed Insurer: Preferred Governmental Insurance Trust (PGIT)

Insurer A.M. Best Rating: N/A - All Excess Carriers are A.M. Best A Rated or Higher

Is faithful performance Included? Yes X No

	Coverage	Limit	Deductible
DEADLY WEAPON PROTECTION	Third Party Liability Coverage	\$1,000,000	\$0
	Crisis Management Services	Included	\$0
	Counseling Services	\$250,000	\$0
	Funeral Expenses	\$250,000	\$0
	Total Premium		\$0

Proposed Agent/Broker: Brown & Brown of Florida, Inc.

Proposed Insurer: Preferred Governmental Insurance Trust (PGIT)

Insurer A.M. Best Rating: N/A - All Excess Carriers are A.M. Best A Rated or Higher

	Coverage	Limit	Deductible	Higher Ded Option
GENERAL LIABILITY	General Liability	\$1,000,000	\$0	\$25,000
	Employee Benefits Liability	\$1,000,000	\$0	\$25,000
	Law Enforcement Liability	\$1,000,000	\$0	\$25,000
	Total Premium		\$138,508	\$120,086

Proposed Agent/Broker: Brown & Brown of Florida, Inc.

Proposed Insurer: Preferred Governmental Insurance Trust (PGIT)

Insurer A.M. Best Rating: N/A - All Excess Carriers are A.M. Best A Rated or Higher

Is coverage being provided on an Occurrence or Claims basis? Occurrence

Are third party sewer back up claims covered? Yes X No

	Coverage	Limit	Deductible	Symbol	Higher Ded Option
AUTOMOBILE	Automobile Liability	\$1,000,000	\$0	1	\$25,000
	Uninsured Motorist	\$20,000	\$0	2	Same
	Medical Payments	\$5,000	\$0	2	Same
	Physical Damage: Comprehensive	ACV/Repair	\$1,000	2,8	Same
	Physical Damage: Collision	ACV/Repair	\$1,000	2,8	Same
	Hired Auto Physical Damage	\$35,000	\$1,000	2,8	Same
	Total Premium			\$112,034	\$95,333

Proposed Agent/Broker: Brown & Brown of Florida, Inc.

Proposed Insurer: Preferred Governmental Insurance Trust (PGIT)

Insurer A.M. Best Rating: N/A - All Excess Carriers are A.M. Best A Rated or Higher

Is Non-Owned and Hired Auto coverage being offered? Yes X No

Are employee take-home vehicles required to be scheduled and declared? Yes No X

Is auto liability coverage limited to employees acting within the scope of duty? Yes No X

	Coverage	Limit	Annual Aggregate	Deductible	Higher Ded Option
PUBLIC OFFICIALS AND EMPLOYMENT PRACTICES LIABILITY	Public Officials Liability	\$1,000,000	N/A	\$0	\$25,000
	Employment Practices Liability	\$1,000,000	N/A	\$0	\$25,000
	Cyber Liability	\$2,000,000	\$2,000,000	\$25,000	Same
	Injunctive Relief/Non-Monetary Claims	\$100,000	\$100,000	\$0	Same
Total Premium				\$97,660	\$79,983

Proposed Agent/Broker: Brown & Brown of Florida, Inc.

Proposed Insurer: Preferred Governmental Insurance Trust (PGIT)

Insurer A.M. Best Rating: N/A - All Excess Carriers are A.M. Best A Rated or Higher

Is coverage being provided on an Occurrence or Claims Made basis?

Public Officials and Employment Practices Liability is Occurrence, Cyber Liability is Claims Made

(Cyber Retroactive Date is 10/01/2015)

Are claims requesting injunctive relief or seeking non-monetary damages paid on behalf or on a reimbursement basis?

Paid on behalf of the City

Does coverage extend to:

Commission Members?	Yes <u>X</u>	No <u> </u>
Appointed Officers?	Yes <u>X</u>	No <u> </u>
Employees?	Yes <u>X</u>	No <u> </u>
Volunteers?	Yes <u>X</u>	No <u> </u>

Are defense costs in addition to the aggregate limit of liability?

Yes X (Unlimited) No

	Coverage	Limit	Retention
WORKERS' COMPENSATION	Workers' Compensation		\$0
	Employers Liability	\$1,000,000	\$0

Proposed Agent/Broker: Brown & Brown of Florida, Inc.

Proposed Insurer: Preferred Governmental Insurance Trust (PGIT)

Insurer A.M. Best Rating: N/A - All Excess Carriers are A.M. Best A Rated or Higher

Are full Workers' Compensation Statutory limits being proposed? Yes X No

Who will administer claims? Preferred Governmental Claims Solutions (PGCS)

PROPOSAL SUMMARY

Premium Summary - 2023-2024			Higher Deductibles Premium Option
Annual Premium - Property (Including Flood Coverage)	\$ 262,330 -		\$240,814
Annual Premium - Inland Marine	\$ 11,806 -		
Annual Premium - Crime	\$ 621 -		
Annual Premium - General Liability	\$ 76,244 -		\$64,807
Annual Premium - Law Enforcement Liability	\$ 62,264 -		\$55,279
Annual Premium - Public Officials and Employment Practices Liability	\$ 97,660 -		\$79,983
Annual Premium - Cyber Liability	\$ 6,123 -		
Annual Premium - Automobile	\$ 112,034 -		\$95,333
Annual Premium - Workers Compensation	\$ 241,032 -		
TOTAL ANNUAL PREMIUM FOR ALL COVERAGES QUOTED	\$ 870,114 -		\$795,798

Is there a two-year rate guarantee? Yes _____ No X

What are the City's obligations upon termination of policy (notice, run-out claims, etc.)?

None. The City of Wildwood is free to leave the Trust on their normal anniversary

renewal date (October 1) with no obligations. If the City were to decide to leave the

Trust during the policy term a 25% minimum earned premium provision would apply.

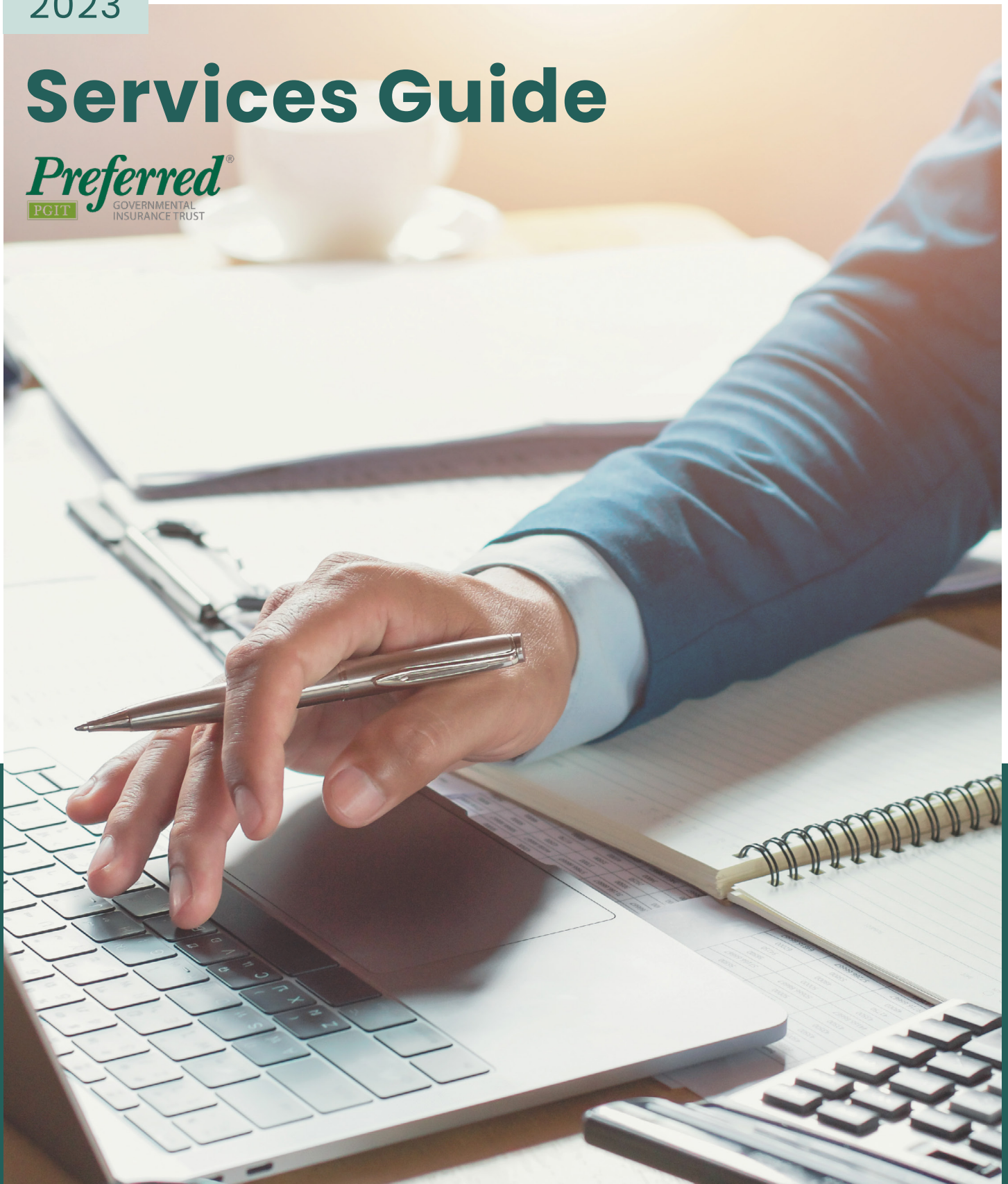
Once 25% or three months premium has been satisfied, no other terms apply.

Tab D

Claims Management Services and Ancillary Services

2023

Services Guide



Preferred Governmental Insurance Trust (Preferred) is a member-owned insurance risk pool serving Florida's public entities since 1999. With a statewide presence and localized options, Preferred is the only Insurance Trust in Florida that uses a totally dedicated and independent agency distribution system for optimal member service.

Table of Contents

3	Introduction
4	Loss Control Consultants & Service Regions
5	Safety & Risk Management Services Overview
6	Claims Management & Training
7	Preferred TIPS
8	Online Learning Center
9	Streaming Video Training
10	Risk Management Resource Center
11	My Community Workplace
12	Preferred Virtual Training Academy
13	Onsite Safety Survey Program
14	Health and Safety Fair Participation

Service is the heart of what we do.

This Services Guide is designed to outline and describe the comprehensive resources and services available to the members of the Preferred Governmental Insurance Trust. The Preferred Loss Control team is available to assist members with their loss control service and risk management needs.



To effectively serve our members, we will implement the following additional measures as needed:

- Maintain effective relationships with agents by keeping them informed of each member's resource requirements and service needs.
- Work closely with PGCS Claim Services to share information and refine data that is used to evaluate our members and target specific areas where services may be required to assist in improving member claims costs.

It is of paramount importance that the level of service we provide meets or exceeds the expectations of our members. We take a pro-active approach to serving our members and encourage you to contact us with your thoughts and input.

Loss Control Consultants & Service Regions



Chris Kittleson

Director of Loss Control Technical Services

Cell: (321)525-0353 | Email: CKittleson@PublicRisk.com

Christopher H. Kittleson is the Director of Loss Control Technical Services for Public Risk Underwriters of Florida and provides Loss Control services for public entities in the Southeast Florida region. With over 24 years of Safety & Health consulting experience in both the public/private sector, Chris has developed expertise in the areas of Safety Program Development, Return-to-Work Programs, Regulatory Compliance, Accident Investigation and Safety Training. Chris graduated Cum Laude from St. Cloud State University, St. Cloud, MN with a Bachelor's of Science in Engineering Technology, has earned his Associate in Risk Management (ARM), is a National Safety Council Certified Defensive Driving Course Instructor, Certified Playground Safety Inspector (CPSI), as well as a Professional Member of the American Society of Safety Professionals (ASSP), Past President of the South Florida Chapter of ASSP and was awarded the 2013 Safety Professional of the Year Award by the South Florida Chapter of ASSP.

Chris serves the Southeast Regional members located within the following Florida counties: Brevard, Broward, Dade, Indian River, Martin, Monroe, Palm Beach, St. Lucie.

Pam Hancock

Senior Safety & Risk Management Consultant

Cell: (321)960-3432 | Email: PHancock@PublicRisk.com

Pam has worked in the insurance field for 28 years, with the last 15 years with Public Risk Underwriters of Florida, Inc. Her experience includes working in program development, marketing, training and liaison between members and Underwriting, Claims and of course Risk Management. She is a Certified ADA Coordinator and has completed the 10-hour OSHA Outreach Training course in General Industry Safety and Health. Pam also completed the Fundamentals of Employment Law with State College of Florida. Her educational background is in business and computer programming. She is an active member of Southwest Florida PRIMA, as well as a Professional Member of the American Society of Safety Professionals (ASSP).

Pam serves our Southwest Regional members located within the following Florida counties: Charlotte, Citrus, Collier, DeSoto, Glades, Hardee, Hendry, Hernando, Highlands, Hillsborough, Manatee, Lee, Okeechobee, Osceola, Pasco, Pinellas, Polk, Sarasota.

Mike Marinaro

Director of Member Services

Phone: (321)832-1473 | Cell: (407)725-6858 | Email: MMarinaro@PublicRisk.com

Mike has a degree in Industrial Safety Engineering and over 38 years' experience in the Safety and Risk Management field. He has been employed by Public Risk Underwriters of Florida, Inc. for 20 years. He holds an RMPE designation, General Lines 220 and 218 licenses, is an active member of Central Florida PRIMA, as well as an active member of ASSP and numerous related Safety and Health organizations. He was a Governor appointee to the Task Force on Workplace Safety.

Mike serves the Panhandle/Central Region members located within the following Florida counties: Alachua, Baker, Bay, Bradford, Calhoun, Clay, Columbia, Dixie, Duval, Escambia, Flagler, Franklin, Gadsden, Gilchrist, Gulf, Hamilton, Holmes, Jackson, Jefferson, Lafayette, Lake, Leon, Levy, Liberty, Madison, Marion, Nassua, Okaloosa, Orange, Putnam, Santa Rosa, Seminole, St. Johns, Sumter, Suwanee, Taylor, Union, Volusia, Wakulla, Walton, Washington.

Please contact the Preferred Loss Control Team with any questions you have.

Safety & Risk Management Services Overview



To better serve our members, we provide a full complement of services, resources and support. All services and resources are free to Preferred members.

Below is a quick summary of the many resources provided to Preferred members:

+ Safety & Risk Management Consultative Services

The Preferred Loss Control Team provides safety and risk management consultative services based on the best practices of accident prevention and claims management. Through the development and implementation of a customized service plan, your Loss Control Consultant will assist you and your organization in reducing claims frequency/severity as well as controlling insurance costs.

+ Claims Management

Your Public Risk Underwriters of Florida Loss Control Consultant will assist with the coordination of Claims Reviews and Claims 101 training, which are provided by Preferred Governmental Claims Solutions (PGCS). The intent is to assist members with posturing claims for positive outcomes as well as educate members on the best practices of claims management.

+ Preferred TIPS Program

Provides a reimbursement of up to 50 percent for relevant safety equipment/risk management training up to a maximum of \$5,000 per policy period.

The success of any Public Entity is tied to its ability to protect and preserve its human and physical assets. This basic premise serves as the cornerstone of an effective safety and risk management program and underscores the importance of safety and risk management to the community. Preferred Loss Control Consultants are very aware of the valuable contribution that a comprehensive Loss Control Program can make to your bottom line.

+ Online Learning Center

An online training platform offering more than 700 training courses covering topics related to HR/employment practices, OSHA compliance, motor vehicle safety and cyber awareness.

+ Streaming Video Training

An on-line video streaming service offering an extensive video library of over 700 videos allows you to watch videos 24/7 on your preferred mobile device. Topics include transport safety, hazmat, workplace safety, construction safety and human resource/legal compliance.

+ Preferred Risk Management Resource Center

Available to members who have their EPLI coverage with Preferred. The Center provides access to numerous resources on employment law, cyber security, ADA website compliance, safety and emergency/disaster response, as well as access to Florida-based employment law experts. HR and cyber experts can be contacted via phone or email.

+ My Community Workplace

A valuable on-line resource that provides up-to-date information, expert commentary, cutting edge training and information on topics ranging from workplace sexual harassment and workplace discrimination to wrongful termination, cyber awareness, ethical behavior and child protection.

+ Preferred News

We provide a quarterly newsletter covering key governmental insurance issues, relevant articles and member news.

+ Preferred Seminars/Webinars

Educational seminars/webinars offered throughout the policy year on relevant topics that include presentations by Public Entity experts and Preferred's panel of defense attorneys.

Claims Management & Training



Preferred Governmental Claims Solutions (PGCS) provides members with the ability to manage their claims more effectively. By accessing the online claims management database, members can report claims online, obtain copies of loss runs, create reports to monitor trends and review claim notes to get up-to-date information on a claim as well as determine claim status.



Registering for PGCS Online Claims Data Access:

To register, visit www.pgcs-tpa.com and click the Member/Client button or contact your Preferred Loss Consultant today.



Loss Control Assistance with Claims Management:

Upon activation of the online claims management database, your Regional Loss Control Consultant is available to assist you with claims management activities that include the following:

- Coordinate claims review by line of coverage
- Coordinate Claims 101 training
- On-site registration assistance with the PGCS claims database
- PGCS database training to include database features/benefits, report generation as well as current claims status
- Assist with the development/implementation of your Return-to-Work (RTW) Program
- Assist with the development/implementation of your claims reporting policy
- Conduct Worker's Compensation Fraud training

Members can report claims online, obtain copies of loss runs, create reports to monitor trends and review claim notes to get up-to-date information on a claim as well as determine claim status.

Preferred TIPS

The Preferred TIPS matching grant program allows for all members to receive up to \$5,000 in a given policy year for up to \$10,000 spent on eligible items.



Program information and requirements can be found on the current Preferred TIPS application.

Examples of eligible reimbursements include:

- Safety related signs
- ADA compliance measures
- Police accreditation program fees
- Driver training
- Ergonomic training
- Sidewalk repairs
- Most any safety related training or equipment
- Employment practices related training



Contact

For more information, please contact your regional Loss Control Consultant or review the [TIPS application](#).

Online Learning Center



Effective training and records management is vital in today's workplace. Reducing claims, controlling losses and streamlining efficiencies are critical. To support these initiatives, Preferred provides our members with innovative web-based training platforms.

Features and benefits of online learning powered by Vector Solutions include:

- Access to more than 700 training courses covering topics related to HR/employment practices, OSHA compliance, motor vehicle safety, cyber awareness and more!
- Online training enables members to define, measure and monitor key risk metrics that help keep their employees safe and protect assets. With the platform, onsite administrators can create risk mitigation tools specific for their organization, making it possible to analyze the fundamentals and take action where needed.
- Our web-based training management platform is accessible 24/7. Users can navigate captivating, cross-browser compatible courses with cutting-edge interactions at a pace and time that is convenient for them.
- Our risk management platform makes it possible for member onsite administrators to assign and deliver online training courses to their users. The system also provides the ability to track, document and report assignments. Tracking training, generating reports and analyzing deficiencies has never been easier.

Preferred provides our members with innovative web-based training platforms

For further details on this valuable resource tool, please contact your Regional Loss Control Consultant.

Streaming Video Training



This training resource gives our members unlimited access to Streamery's extensive video streaming library of videos covering workplace safety, driving safety, construction safety, and human resource/legal compliance. Video titles are available in both English and Spanish to support your organization's training initiatives.

Features of Streamery video streaming service include:

- An easily accessible, extensive video library of over 700 training videos
- Video course materials to include leader guides, quizzes and completion certificates
- Tablet and mobile capable – Now you can watch videos on your preferred mobile device, such as tablets and smartphones. Videos available 24/7.

As part of Preferred's initiative to provide improved products/services offered to our members, we encourage you to use the Streamery video streaming service for assistance with your safety and risk management training needs.

To learn more on how your organization can take advantage of this exciting free training resource, contact your Preferred Loss Control Consultant.

Risk Management Resource Center



The Preferred Risk Management Resource Center (PRMRC) is available to members who have their EPLI coverage with Preferred. The Resource Center is an employment law, cyber security, ADA compliance and safety-focused resource designed to control costs, save time and complement the valuable services that Preferred provides.

The PRMRC has been recently improved to include:

- Over 22,000 pieces of relevant content and applications
- More than 200 online training courses
- And more!

Human Resource (HELPLINE) Services include:

- Confidential, documented and real time responses to your employment law questions from experts in human resource and employment law. This service is available to members via phone and email.
- Online Unlawful Harassment Training for all supervisors and employees
- A Florida specific employee handbook building tool
- Customizable HR risk management resources including federal and state-specific forms and posters

Cyber security resources include:

- Cyber Assessment – Easy-to-use tool to measure data breach exposure with instant feedback on how to protect your organization from potential cyber risks
- Robust privacy and security templates, including a customizable incident response plan (IRP), which can be specifically tailored to meet industry and regulatory requirements
- Unlimited access to cybersecurity experts via phone or email
- Resources for keeping staff up to date on a range of issues related to privacy, data security and compliance
- Latest news and events regarding data breaches, regulations, class-action lawsuits, cyber threats and protective technologies

ADA website compliance:

- ADA compliance fact sheet and checklist - Resource tools to review an organization's online presence
- WAVE® by WebAIM Accessibility Evaluation Tool - Evaluate accessibility of an organization's website

Safety resources include:

- Safety procedures & practices
- Workers' compensation resources
- Union relations resources
- Unemployment compensation resources
- Layoff resources
- OSHA training videos

Emergency and disaster resources include:

- Sample communications
- Plans
- Policies
- Posters and notices
- Federal and state resources
- Helpful checklists

Members who have their EPLI coverage with Preferred may register to use this valuable service by going to: PgItSupport.com, or by calling (877) 568-6655 to speak with a Risk Management Resource Center representative.

My Community Workplace Website

The My Community Workplace is available to all Preferred members. This free online resource that can save you time and money by providing cutting edge training and information for your workplace. Members may register to use this valuable resource at MyCommunityWorkplace.org.

Online Training

Online training modules for managers and supervisors are available 24/7 at no cost to the member. This could result in a potential savings of thousands of dollars a year in training costs.

Training courses available:

- Preventing Workplace Sexual Harassment
- Preventing Workplace Discrimination
- Preventing Wrongful Termination
- Promoting Ethical Behavior
- Promoting Child Safe Environments

Up-to-Date Information and Expert Commentary

Topics include:

- Best practices for employment practices and child protection
- Leadership and management skills
- Cyber awareness
- Exclusive articles written for the specialized interests, such as government entities, schools and not-for-profits

Knowledge Vault

- Library and checklists – Thousands of articles covering vital workplace issues, grouped according to topic, as well as self-audit checklists
- Links to important federal and state government websites
- Model Handbook – Over 95 model policies on workplace issues ranging from equal employment opportunity to social media (certain key policies are available in English and Spanish)
- Loss Scenarios – Examples of situations that have caused liability for organizations like yours

Notice: MyCommunityWorkplace.org is a product of The McCalmon Group, Inc., platform administrator solely responsible for its content.



Preferred Virtual Training Academy



The Preferred Virtual Training Academy provides virtual training by our experienced Loss Control Consultants, as well as industry experts on a variety of topics such as workplace safety and claims handling, human resources and cyber security. Training is interactive and customized to better meet the educational needs of your organization. As always, training is provided at no additional cost to Preferred members. Some of the benefits of using virtual training include:



Convenience

Employees can take training at their workstation at the traditional workplace or from a remote location.



Productivity

Virtual training allows employees to use their time more effectively. Safety: Employees do not have to physically gather in groups.



Efficiency

No requirement to reserve/setup training room, as well as coordinate setup of audio/visual equipment.



Cost effectiveness

Employees do not need to travel off site to receive training.

We encourage you to contact your Preferred Loss Control Consultant to learn more about our Virtual Training Academy and begin the process of selecting training topics. In addition, a comprehensive list of customized training topics to meet your needs is available upon request.

Onsite Safety Survey Program



Our Loss Control Consultants are always available to meet your onsite/in person needs including conducting training on hundreds of topics and assisting members with safety surveys and inspections.

The primary goal is to identify unsafe conditions and/or unsafe behavior that could contribute to an accident, injury and/or illness. General surveys/inspections can be provided as well as surveys/inspections with a specific emphasis, i.e., slip, trip and fall hazards or ADA. We have developed safety inspection checklists to assist our members in providing regular and recurring inspections on a proactive basis. These checklists allow members to proactively identify workplace safety hazards and provide corrective action before an accident, injury and/or illness occurs.

We can assist in finding and reducing these hazards!

- + Public Beach
- + Cafeteria / Kitchen
- + City Hall
- + Public Dog Park
- + Fire Station
- + Meeting / Exhibit Hall
- + Public Park
- + Park Trails
- + Playground
- + Police Station
- + Schools
- + Skate Park
- + Sports Complex (indoor)
- + Sports Complex (outdoor)
- + Public Swimming Pool
- + Trenching & Shoring
- + Public Utilities
- + Vehicle Maintenance Garage

Health and Safety Fair Participation



Planning a special event for your employees? Preferred's Loss Control Consultants can participate in your upcoming employee health and safety fairs.

Our participation in your special event could include one or more of the following:

- Safety related hand-out materials, such as booklets and brochures
- Special event promo giveaway items

Contact your agent or Preferred Loss Control consultant on how we can participate in your upcoming employee related special events.

Tab E

References

REFERENCES FORM

Provide specific references for at least five (5) customers (preferably public entities), including customers served, with specific types of insurance provided. They should be of similar sizes, complexity and magnitude to the City. Additional references maybe provided by attachment:

Proposer: Brown & Brown of Florida, Inc.

Organization: City of Leesburg
Address: 501 W Meadow Street Leesburg, FL 34748
Contact: Jim Williams Phone Number: (352) 728-9715
Insurance Service Provided: Property and Casualty Insurance Program, Health Insurance

Organization: City of Mount Dora
Address: 510 N Baker Street Mount Dora, FL 32757
Contact: Kimberly Helfant Phone Number: (352) 735-7146
Insurance Service Provided: Property and Casualty Insurance Program, Health Insurance

Organization: Village Center Community Development Districts
Address: 1071 Canal Street The Villages, FL 32162
Contact: Kathleen Storey Phone Number: (352) 674-1828
Insurance Service Provided: Property and Casualty Insurance Program

Organization: Sumter County Schools
Address: 2680 West CR 476 Bushnell, Florida 33513
Contact: Eric Suber Phone Number: (352) 793-2315 ext. 52210
Insurance Service Provided: Property and Casualty Insurance Program

Organization: Lake County Board of County Commissioners
Address: 315 West Main Street Tavares, FL 32778
Contact: Jim Kovacs Phone Number: (352) 343-9697
Insurance Service Provided: Property and Casualty Insurance Program

Tab F

Additional Information



ORGANIZATIONAL STRUCTURE

Board of Trustees	The Preferred Board of Trustees consists of 7 locally elected officials who direct the overall policy making decision for the Trust.
Preferred	The trust is a member owned organization formed in 1999 under FS 624.4622.
Public Risk Underwriters of Florida, Inc.	PRU of FL is the administrator hired by Preferred to oversee the day to day operations of the Trust including underwriting, loss control, marketing, and accounting.
Independent Agents	Preferred contracts with local independent agents to sell and market their products. The Preferred Board of Trustees decided early on that this was likely the best method of allowing the members to have local representation with Preferred.
Members	Preferred currently has 370 members and in order to be eligible for membership you must be a public entity located in the state of Florida. Preferred enjoys a variety of member types including counties, cities, fire districts, school boards, charter schools, aviation authorities, port authorities, sheriff departments and a number of other taxing districts.
Preferred Governmental Claims Solutions	PGCS is the third-party administrator hired by Preferred to handle the claims administration for the members of the Trust.

Our Expert Board Knows Your Business

Preferred's membership is represented by Elected Officials from all segments of Florida's Public Sector.



Trustees

Our Board works diligently to set policy, keeping Preferred as the premier public entity insurer of its kind.

DWIGHT E. "ED" WOLF, II
Chair

Mayor, City of Wildwood

CHRIS HOFFMAN
Vice Chair/Marketing Committee Chair

Mayor, City of Jacksonville Beach

CHARLES WALSEY
Excess/Underwriting Committee Chair

Chair, Cypress Grove C.D.D.

MINDY GIBSON

Councilmember, City of Satellite Beach

KATHY BRYANT
Secretary/Investments Committee Chair

Commissioner, Marion County

BRETT LOWRY

Commissioner, City of Port St. Joe

SEAN PARKS
Risk Management/Claims Committee Chair

Commissioner, Lake County

A Letter from the Preferred Board of Trustees' Chair

Preferred Governmental Insurance Trust® (Preferred®)

Preferred Governmental Insurance Trust® (Preferred®) continues its steady growth and increasing visibility throughout Florida. With hundreds of members and over \$100 million in annualized premiums, your Board of Trustees is working hard to keep Preferred as the premier public entity insurance program available in the state. We continue to accomplish this goal due to the diligent efforts of Public Risk Underwriters®, trust's administrator, and Preferred Governmental Claim Solutions® (PGCS®), the claims administrator. Their experienced leadership and dedication allow Preferred to continue to provide you with both innovative and optimal insurance solutions.

On behalf of your Board of Trustees, thank you for your participation in Preferred. I encourage you to take advantage of the great programs and services Preferred has to offer.

Thank you for continuing to make Preferred the premier public entity program in Florida.

ED WOLF

Preferred Board of Trustees' Chair



INSURING FLORIDA'S FUTURE

Founded in 1999, Preferred is a non-assessable insurance risk pool made of and for its members, focusing on the unique needs of Florida's public sector. Our robust membership and financial strength stem from a conservative platform of managed risk. Program administration is provided by Public Risk Underwriters of Florida (PRU).



A key distinguishing feature and advantage of Preferred is the exclusive utilization of independent agents who specialize in public sector risk throughout the state for distribution.

Why is this important? Our members receive local, personalized service and have built-in representation and advocacy to achieve optimal results.

Preferred's membership is represented by Elected Officials from all segments of Florida's Public Sector. Our Board of Trustees understands your needs and works diligently to bring you enhanced programs and services.

Specialized member-oriented claims service is provided by Preferred Governmental Claims Solutions (PGCS). With more than 40 years in claims experience, PGCS is Florida's foremost governmental third-party administrator. The **cornerstones** of their claims administration are communication, quick access, and sound return-to-work policies.



Preferred is a proven structure of strength created to protect Florida's public sector.

The brief description of coverage contained in this document is provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

SERVICE - IT'S THE HEART OF WHAT WE DO

Our Loss Control & Member Services team takes a proactive approach designed to reduce and prevent claims by customizing our services to your needs **at no additional cost**.

Dedicated Loss Control Consultant provides:

- Onsite safety inspections
- General safety training
- Safety program development, review & evaluation
- Claims analysis & management
- Claims training and claim reviews
- Accident Review Board development & assistance

Preferred Risk Management Resource Center for POL/EPLI/CYBER lines:



- **Cyber Security Resources**
 - o Breach health check
 - o Customizable Incident Response Plan
 - o Access to Cyber Security experts for guidance
 - o Immediate crisis management & response
- **HR Helpline Services**
 - o Access to Florida Based attorneys for guidance on employment related matters
- **ADA Website Compliance Resources**
 - o WAVE by WebAIM accessibility evaluation tool
 - o Expert guidance on ADA compliance

Vector Solutions – Online training platform with over 600 training courses on HR/Employment Practices, OSHA Compliance, Motor Vehicle Safety, etc.

Preferred Virtual Training Academy – Virtual training on a wide variety of topics provided by our Loss Control Consultants and industry experts.

Streamery – 24/7 mobile streaming from anywhere with over 700 training topics

Preferred TIPS – 50/50 matching safety & loss control grant program up to \$5,000.

24/7 claims reporting

Catastrophic Adjustment Teams

Special Investigation Unit

B.A.D.G.E. – Cardiac case management program



The brief description of coverage contained in this document is provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

YOUR MEMBER SERVICES & LOSS CONTROL TEAM



Kevin Meehan oversees the Loss Control and Member Services department and implements member service initiatives. He develops and improves educational training programs, member service platforms, and member safety incentive programs. He is ultimately responsible for increasing member engagement to improve member loss experience and reduce out of pocket costs.



Christopher H. Kittleson has more than 25 years of risk management and loss control experience. Chris has developed industry expertise in the areas of Public Entity Safety Program Development, Return to Work Programs, Regulatory Compliance, Accident Investigation and Safety Training. Chris graduated Cum Laude from St. Cloud State University with a BS in Engineering Technology. He earned his Associate in Risk Management (ARM) and Certified Playground Safety Inspector (CPSI) designations. He was awarded the 2013 Safety Professional of the Year Award by the South Florida Chapter of the American Society of Safety Engineers (ASSE). Chris has presented on behalf of National Associations and has published several articles in loss control and risk management trade publications.



Pam Hancock has been in the insurance industry for the past 26 years and has worked primarily with governmental entities during her career. She provides safety training, program/policy development, safety committee oversight, performs claims reviews, trending analysis and inspections. With an emphasis on education and a deep understanding of the claims process, Pam has become a valuable resource to Preferred members. Pam is a Certified ADA Coordinator.



Mike Marinar has a degree in Industrial Safety Engineering and over 37 years experience in the safety and risk management field. Mike's primary objectives include safety and loss control initiatives, reconciling issues between Preferred members and third-party claims administrators, and developing opportunities for the Trust's participants to gather knowledge, skills, and information to effectively govern and manage insurance costs. Mike is a member of ASSE, was appointed by the Governor to the Task Force on Workplace Safety and has provided multiple trainings to state agencies.



Mike Stephens has been involved with Loss Control and Member Services since 2004. Mike has completed the OSHA 501 Trainer Course in Occupational Safety and Health Standards (General Industry) and has attained certification as a Safety Auditor. Mike's safety awareness and dedication to customer service are what make him an essential part of the Member Services and Loss Control team. Mike is the resources and services coordinator and support specialist for all Preferred members.

The brief description of coverage contained in this document is provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

PERSONALIZED TOP-TIER CLAIMS SERVICE



-  **450** Government Entities Served by PGCS
-  **3** Decades of Claims Service
-  **20** Average Years of Teammate Industry Experience
-  **12** Average Years of Teammate Tenure at PGCS



PGCS LEADERSHIP TEAM

Fred Tucker,
Vice President



Fred is responsible for the daily operations of PGCS. Fred began his career in the insurance industry as an independent adjuster in 1999, working his way into a management role with a national insurance agency where he led the risk services department. Fred joined PGCS in 2007 as a Senior Claims Specialist handling public entity automobile liability, general liability, employment liability with an emphasis on complex matters involving litigation management, working closely with defense counsel to ensure proactive handling of claims.

Cheryl Riley,
Director of WC
Claims



Cheryl is responsible for the overall direction and leadership of the PGCS workers' compensation claims unit. While at PGCS, Cheryl has steadily promoted and held the positions of Account Manager, Quality Assurance Manager and Workers' Compensation Claims Manager prior to her current position of Director of Workers' Compensation Claims. Cheryl's dedication to customer-centric solutions and focus on building strong 'partner' relationships has been successful for PGCS and its customers. Cheryl holds a Florida All Lines license, and has earned the designation of a Board Certified Workers' Compensation Litigation Claims Specialist.

Stacy Hargrove,
Director of
Liability Claims



Stacy Hargrove has more than 33 years of experience handling all types of liability claims and subrogation matters. She has held various positions within the claims industry and has proactively handled a variety of liability claim types including auto accident, slip and fall, premises liability, employer liability, and subrogation recovery; all with client accolades for excellent customer service and knowledge. Stacy has extensive litigation management experience and works directly with defense counsel in defending litigated claims. She has also monitored several trials and has been successful in partnering with her legal team to achieve favorable defense verdicts as well as other positive resolutions. Stacy has a wealth of knowledge in the liability arena and is an integral and valued member of the PGCS team.

The brief description of coverage contained in this document is provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

INNOVATIVE SOLUTIONS. ACCURATE VALUATIONS.

AssetWORKS

In partnership with
AssetWorks, Preferred
provides property appraisals

for all property locations at no cost to our Members. The field appraisals provide critical information on primary and secondary building characteristics, flood zones, and valuations. Field appraisals are conducted by AssetWorks on a rolling five-year schedule, trending reports are available in the interim upon request. Once the appraisal is completed, Members then have the choice to insure at appraised values to maintain blanket coverage. If a Member chooses to underinsure the property, the coverage agreement will be endorsed to “stated value” with an 80% coinsurance clause.

You receive exclusive access to the AMP platform which offers an innovative approach for property tracking and valuation management. AMP provides dynamic reporting capabilities and features an intuitive design which allows your team to get up and running in minutes. Vital property information is maintained in AMP, including a change history for each asset. Up-to-date property valuations and information are automatically imported into AMP and our experienced team offers personalized training to optimize your use of the system and reporting tools.



The brief description of coverage contained in this document is provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

DISASTER PREPAREDNESS AND RESPONSE WE ARE WITH YOU EVERY STEP OF THE WAY

We take a multiprong approach to disaster response and recovery and it begins with **preparedness**. Our loss control consultants work with you to review and implement a disaster recovery plan that will stand up to the worst of disasters. We provide one on one training on the claims process and distribute an annual preparedness guide with an abundance of resources to make sure that you are ready should a disaster strike. We also provide hurricane kits so that you have the necessary policy information at your fingertips in the event of a power outage.

When a named storm is approaching, our field adjusters from Engle Martin are staged nearby with all contact and policy information for each member so that they can provide damage



inspections immediately after a storm. Engle Martin uses cutting edge drone technology to identify damage mitigation opportunities that you may not have known existed. The EM adjusters also have access to prior appraisals and COPE data which helps streamline and expedite the claims process. This real time response enables us to get advance claim payments in your hands **within days**.



Preferred has partnered with First Onsite Property Restoration company to provide **turn-key emergency response mitigation and property restoration** with a 24/7 response including holidays and weekends. Their project managers will complete an initial

scope and get the equipment you need to get back up and running immediately. First Onsite can supply backup generators, portables or temporary structures, and anything else you need. The project manager from First Onsite will provide a seamless delivery of service to get you back to your pre-disaster state. If your preference instead is a local contractor, you can use any vendor that you choose or select from our preapproved list of vendors. Payments can be made directly to vendors for a seamless process.

To finalize your claim, we provide a claim resolution packet which includes all documentation to support your claim in addition to FEMA closeout assistance.

The brief description of coverage contained in this document is provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

LIABILITY DEFENSE PANEL

Roper, P.A.

2707 E. Jefferson Street
 Orlando, FL 32803
 (407) 897-5150
www.roparpa.com

Brionez & Brionez, P.A.

322 W. Burleigh Blvd
 Tavares, FL 32778
 (352) 432-4044
www.bblawfl.com

Carr Allison

305 S. Gadsden St.
 Tallahassee, FL 32301
 (850) 222-2107

208 N. Laura Street
 Suite 1100
 Jacksonville, FL 32202
 (904) 328-6456
www.carrallison.com

Kelley Kronenberg

1475 Centrepark Blvd,
 Suite 275
 West Palm Beach, FL 33401
 (561) 684-5956
 Tampa/ Jacksonville/ Fort
 Lauderdale Locations
www.kelleykronenberg.com

Quintairos, Prieto, Wood & Boyer, P.A.

4190 Belfort Rd, Suite 450
 Jacksonville, FL 32216
 (904) 354-5500
www.qpwblaw.com

Roberts, Reynolds, Bedard & Tuzzio, P.A.

470 Columbia Drive
 West Palm Beach, FL 33409
 (561) 688-6560
www.rrbpa.com

5237 Summerlin Commons
 Blvd.
 Ft. Myers, FL 33907
 (239) 275-2268
www.rrbpa.com

Rumberger, Kirk & Caldwell P.A.

101 N. Monroe Street,
 Suite 120
 Tallahassee, FL 32301
 (850) 222-6550
www.rumberger.com

Llopiz Wizel

1451 W Cypress Creek Rd
 Suite 300
 Fort Lauderdale, FL 33309
 (754) 312-7389
www.l-wfirm.com

Unice, Salzman & Jensen, P.A.

1815 Little Road
 Trinity, FL 34655
 (727) 723-3772
www.unicesalzman.com

Warner Law Firm, P.A.

501 W 11th St.
 Panama City, FL 32401
 (850) 784-7772
timwarner@warnerlaw.us

Walton, Lantaff, Schroeder & Carson LLP

931 Village Blvd, Suite 905
 West Palm Beach, FL 33401
 (561) 689-6700
www.waltonlantaff.com

Weiss, Serota, Helfman, Cole & Bierman

2525 Ponce De Leon Blvd,
 Suite 700
 Coral Gables, FL 33134
 (305) 854-0800
www.wsh-law.com

WORKERS' COMPENSATION DEFENSE PANEL

**Barbas, Nunez, Sanders,
Butler & Hovsepian**
1802 W. Cleveland Street
Tampa, Florida 33606
(813) 279-2686
www.barbaslaw.com

Roper, P.A.
2707 E. Jefferson Street
Orlando, FL 32803
(407) 897-5150
www.roparpa.com

Chartwell Law Offices, LLP
2984 Wellington Circle
Tallahassee, FL 32309
(850) 668-7900

833 Highland Avenue, Suite 202
Orlando, FL 32803
(407) 203-3600
www.chartwelllaw.com

Cole, Stone & Stoudemire, P.A.
201 North Hogan Street #400
Jacksonville, FL 32202
(904) 352-9664

Hernandez, Hicks & Valois
5800 N. Andrews Avenue
Ft. Lauderdale, Florida 33309
(954) 938-1920
dhernandez@hhdefense.com

Kelley Kronenberg
10245 Centurion Pkwy N. Suite 300
Jacksonville, FL 32256
(904) 549-7700
www.kelleykronenberg.com

Public Entity Legal Solutions
P.O. Box 958464
Lake Mary, FL 32795
(321) 832-1400
ghelm@pelsusa.com
www.bha-law.com

Walton, Lantaff, Schroeder & Carson LLP
931 Village Blvd, Suite 905
West Palm Beach, FL 33401
(561) 689-6700
www.waltonlantaff.com

COVERAGE ADVANTAGES

Superior Windstorm Coverage - While other risk pools exclude wharves, piers, docks, signs, antennas, and communication towers, our program provides wind coverage for these scheduled locations.

Preferred property program is a shared limit. The amount of limit purchased is determined annually. In our 22 years of operation and responding to numerous windstorm events, Preferred's total losses have never exceeded the shared limit purchased

Most competitive windstorm deductibles in the state.

No wind exclusions for locations near the coast.

No additional premium charged for property locations acquired during the year, no cap in value.

Property in the open (PITO) coverage is provided up to 1,000 feet of an existing location with no valuation restrictions.

Blanket Inland Marine Coverage for individual equipment valued less than \$25,000.

\$100,000 of Non-Monetary coverage for Injunctive Relief, EEOC, Public Records and Inverse Condemnation allegations.

Professional Liability offered on either claims made or occurrence form.

Cyber Liability limits up to \$2,000,000 for both 1st and 3rd party claims.

Available Limits up to \$10,000,000 on all liability lines.

Public Officials and Employment Practices liability with no aggregate limit.

Defense costs are outside of the limit of liability, deductible does not apply to defense.

Deadly Weapon protection coverage free of charge. Crisis Response provided by CrisisRisk, a leading national response firm.

Unmanned Aircraft (Drone) Liability coverage of \$500,000.

The brief description of coverage contained in this document is provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

2023

Preparedness Guide

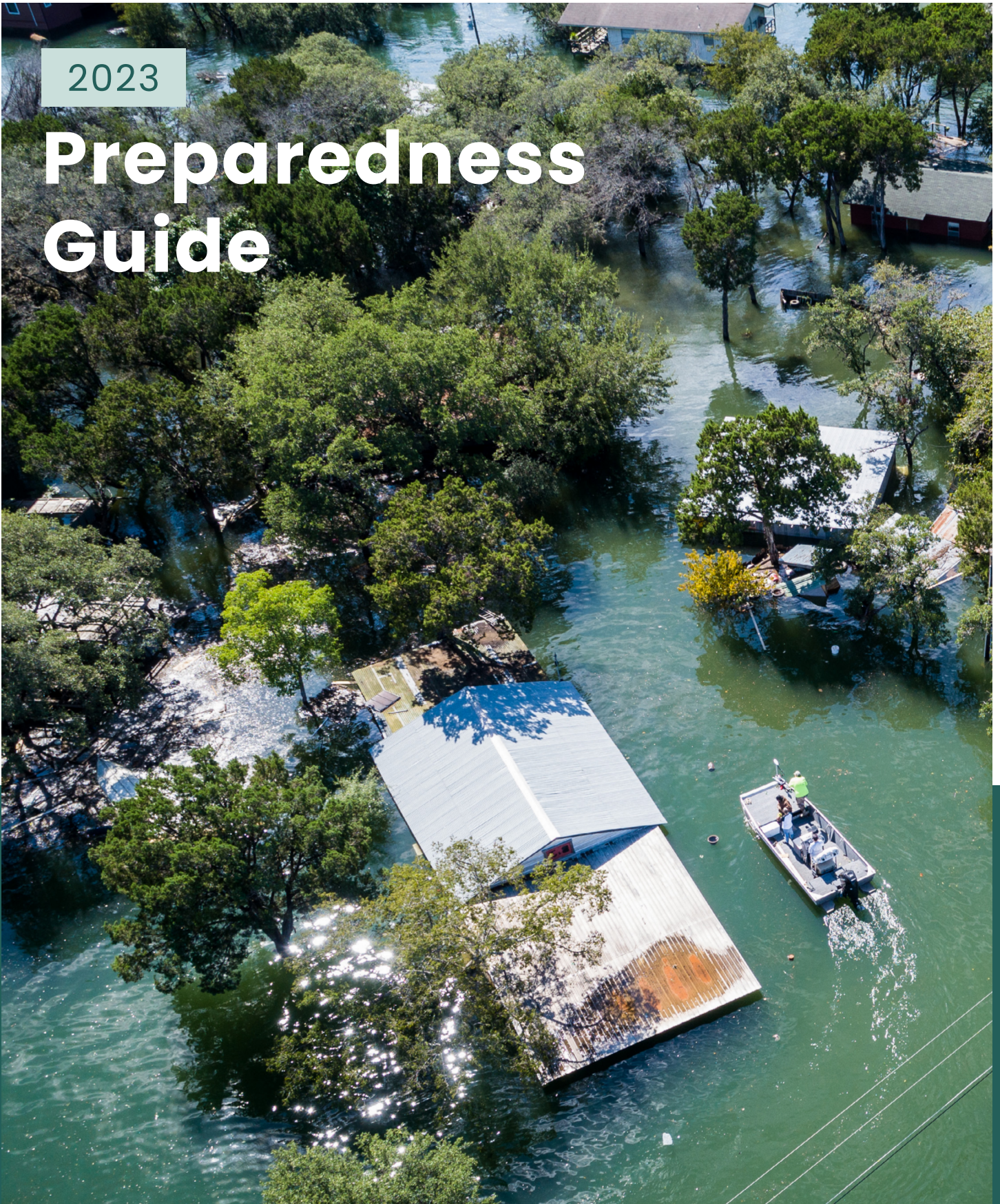


Table of Contents

3	Are you ready?
5	Preventing employee injury and illness
6	First responder preparedness
7	Hurricane debris – plan on it!
9	The property data you need for hurricane season
12	Reporting hurricane claims
14	Pre- and post-disaster FEMA planning tasks
16	Disaster recovery & mitigation support

Are you ready?



Florida residents are no strangers to natural disasters, and our location leaves us vulnerable to those disasters, especially hurricanes. Natural disasters cause significant disruption to our daily lives having serious effects on our communities. Preparedness is vital. Having the knowledge, skills and abilities to respond to a disaster is essential and part of everyone's responsibility.

This guide was specifically prepared for Preferred members and contains important information regarding sound Risk Management principles and practices. These will assist you and your organization in preventing injuries, protecting your property as well as saving you time and money. Most important is the claims handling process. Understanding this process beforehand will help you greatly when you need it most. The team at Preferred Governmental Claims Solutions (PGCS) is ready and able to assist you with any claims related questions you may have pre/post disaster. In addition, our Preferred Loss Control team is available to lend assistance with providing valuable resources pertaining to enhancing your existing emergency preparedness programs, policies and procedures.

Working together will play a key role in how quickly we recover from disasters. This Preparedness Guide will make you better prepared for the next big disaster.



Important message for Preferred Property/IM coverage members

In preparation for the 2023 Storm Season, and as a service to our Property/Inland Marine coverage members, we are happy to provide you with an electronic version of the Hurricane Kit, which contains the following information:

- + 2023 Hurricane Cover Letter
- + PGCS Hurricane Claims Process & Preferred/First Onsite
- + Partnership flyer
- + Preferred Recovery Vendors list
- + Acord Property and Auto Loss notices
- + Member Property and/or IM schedules

If you would like to receive an electronic version of the Hurricane Kit for your organization, please email your request to Michael Stephens, Senior Loss Control Specialist at MStephens@PublicRisk.com.

Please follow us on Facebook for storm updates and information.

Preventing employee injury and illness

Florida's hurricane season exposes employees to an increased risk of injury and illness. More specifically, injuries are likely to occur in advance of the storm during emergency preparations, during the storm for first responders who are required to go into the storm and to those employees who are exposed to post hurricane activities.



HURRICANE PREPARATION

To reduce storm related injury/illness during emergency preparations, implement an **Emergency Action Plan (EAP)**. The Occupational Health and Safety Administration (OSHA) require employers with more than 10 employees to develop and implement an Emergency Action Plan. The EAP should be developed to identify and coordinate necessary employer and employee actions during an emergency such as a hurricane. In addition, for the EAP to be effective, it's important to train employees so they better understand their roles and responsibilities under the plan. At a minimum, the EAP must include the following elements:

- Means of reporting emergencies
- Evacuation procedures and assigned exit routes
- Procedures to account for all employees following an evacuation
- Procedures to be followed by employees required to remain behind to attend to critical operations before evacuating
- Rescue and/or medical duties for employees who are assigned/trained to perform them
- Names or job titles of people who can be contacted for more information about the plan
- The location of the nearest hospital or emergency medical center
- The type of alarm system used to notify employees of an emergency
- The location and permissible use of protective equipment such as portable defibrillators, first aid kits, dust masks and fire extinguishers
- Identify employees who are qualified or trained to perform emergency preparations to reduce the potential for injury or illness

RESPONDING DURING AN EMERGENCY

While most employees can stay inside during a hurricane, some employees are required to go into the storm. This may include utility workers, law enforcement personnel, firefighters and emergency response medical personnel, sanitation and public works employees. During a hurricane, some typical workplace safety hazards employees would be exposed to include the following:

- Electrical hazards from downed power lines or downed objects in contact with power lines
- Burns from fires caused by energized line contact or equipment failure
- Falling and flying objects such as tree limbs and utility poles
- Hazardous driving conditions due to slippery roadways
- Slips and falls due to slippery walking/working surfaces
- Exhaustion from working extended shifts
- Falls from heights
- Dehydration
- Heat stress
- Musculoskeletal hazards
- Waterborne diseases

Once the proverbial dust settles after a hurricane, hazards to employees still remain. Hazards are even greater for employees who are tasked with cleaning up after the storm, and employees can expect to be exposed to the following:

- Exposure to hazardous chemicals or mold
- Downed power lines and trees
- Heat illness
- Confined spaces
- Mosquito-borne diseases such as Zika virus
- Structural destabilization
- Tree removal/chain saws
- Exhaustion from working extended shifts

In all cases, employers must ensure employees exposed to the hazards referenced are provided with appropriate training, proper tools and equipment as well as personal protective equipment to reduce and/or eliminate workplace injuries or illness during Florida's hurricane season.



For additional information and assistance regarding emergency preparedness, please contact your Preferred Loss Control Consultant.

Page 51

First responder preparedness



We ask a tremendous amount of our first responders during disasters and emergencies. They are the first line of defense, and they are the first helping hand extended to survivors. Our ability to respond to and recover from disasters is directly influenced by how well prepared our first responders are and how well we all work together as a team before, during and after a crisis.

First responders must provide essential services to respond to the impacts of the disaster on the community at large, prevent further damage where possible, and serve as a steady presence in the face of such events. To be able to provide these essential services, responders must take many of the same preparedness steps as other members of the community.

If responders fail to prepare themselves and their families in advance of a disaster, they can be hindered in their ability to perform their jobs when a disaster strikes, as they will be focused on personal and family safety. This advance planning lessens the burden on responders during a response and helps them devote more of their mental resources to the task of securing the community.

First responder preparation should include project goals, objectives and potential obstacles and challenges. This will allow planners to focus efforts and take mitigating actions against any projected challenges.

A comprehensive organizational preparedness program should consider four core interrelated phases:

- Pre-incident awareness, education and training
- Facilities and equipment assessment
- Procedure and policy assessment
- First Responder Organizational Preparedness Plan

Specific personnel should develop and design the Organizational Preparedness Plan, which should include the following additional activities:

- Conduct preparedness surveys
- Identify sheltering options for personnel and family members, including internal shelters as well as public shelters
- Establish a capacity for long-term feeding operations for responders and their families
- Determine emergency power capability, and build capacity if lacking
- Establish long-term funding for these capabilities
- Conduct training and exercises
- Educate responders and the public

The role of first responders when responding to a disaster is very similar to the day-to-day role of public safety and supporting the community. In preparing for a disaster, first responders trust their training and capitalize on their knowledge of a community.

Exercises portraying the situations (large- and small-scale events) help better prepare responders to fully understand the resources needed for each event and apply that information to each community's needs.

Fire, EMS and Law enforcement officials know their communities best and interact with residents on a daily basis. This knowledge helps them provide valuable situational awareness to response and recovery groups coming in to help.

First responders play a key role in many of the operations that maintain overall public safety within the community during a disaster. It is critical to develop a plan and prepare for the challenges that arise during these events.

During a disaster, first responders play a key role in many operations including: search and rescue, evacuations, door-to-door checks and maintaining overall public safety within the community.

Hurricane debris – plan on it!



Debris created by storms can be overwhelming in its magnitude. Debris management and removal are invariably among the most complex and costly problems following a disaster.

Over 1,000,000 cubic feet of debris were created by Hurricane Matthew in Flagler and St. Johns counties alone. When asked if he had any advice regarding the post hurricane debris, Joe Meyer, retired Risk Manager at Flagler County responded, “Make sure you know where you’re going to put it, plan for it!”

The cost of debris removal can mean the difference between successfully managing it post hurricane or not. Cleaning up debris can be time consuming and costly, extending the recovery from the disaster.

According to FEMA, Hurricane Katrina, one of the most catastrophic natural disasters in history, resulted in more than 99 million cubic yards of debris, totaling greater than \$3.7 billion in debris removal costs.

In 2022 natural catastrophe losses worldwide were approximately \$270 billion. Hurricane Ian alone had estimated insured losses of \$60 billion and that was just one of eight hurricanes in the Atlantic that year. Additionally, the five warmest years on record for the U.S. all have occurred since 2006. It stands to reason that these increases will continue each year going forward. The amount of debris generated by natural disasters, and the costs to manage it, will likely increase as a result.

After a natural disaster strikes, a community, working with federal and state officials and other stakeholders, must conduct many debris management-related activities before it can fully recover. These activities can include:

- Estimating debris quantities
- Assessing debris management options
- Triaging debris management
- Segregating debris into different material and waste streams
- Identifying debris management sites and facilities and their available capacities
- Collecting and hauling debris from the field and/or curb
- Removing debris from waterways and sensitive habitats
- Debris sampling and analysis
- Characterizing debris for proper management
- Obtaining emergency permits
- Processing debris (e.g., volume reduction, refrigerant removal)
- Packaging and labeling debris for transport
- Transporting debris to debris management sites and facilities
- Managing debris through reuse, recycling, treatment and/or disposal
- Monitoring incoming debris at the debris management sites and facilities
- Tracking debris from the original deposited point to final destination
- Conducting debris management oversight activities, including site visits, inspection and environmental monitoring at debris management sites
- Communicating with the public about debris collection and other management activities

Pre-incident debris management planning by communities can go a long way in mitigating the cost and time of disaster recovery.

Planning should include forecasting debris volumes and types, identifying available capacity, developing debris management options and defining roles and responsibilities for all related activities.

Pre-incident debris management planning can provide significant benefits:

- Saves valuable time and resources during a response to a disaster
- Allows more efficient, effective and environmentally responsible waste management decision-making during a disaster
- Encourages stakeholders (state, local, owners of private storage, treatment and disposal facilities, residents) to work together before disaster occurs
- Boosts the community's resiliency in the wake of a disaster and positions it for a quicker and less costly recovery to its pre-incident state
- Enhances the community's adaptation to the debris-related impacts of climate-change
- Minimally detracts from, or otherwise impacts, the broader response and recovery efforts due to the efficient implementation of debris management activities

Based on lessons learned and insights from community officials who have conducted debris cleanup after a natural disaster, the Environmental Protection Agency developed a comprehensive, pre-incident planning process to help prepare communities for effective disaster debris management.

This recommended process guides communities through four steps:

1. Conduct pre-planning activities
2. Develop a comprehensive pre-incident debris management plan
3. Keep the debris management plan updated
4. Implement the debris management plan during a natural disaster

[Introduction to EPA's Planning for Natural Disaster Debris Guidance](#)

Florida is unique in its vulnerability to hurricanes. There are few communities that haven't been affected by a hurricane in recent years. Storms are getting more severe and the costs and clean-up post disaster more profound. Planning for what needs to be done post-disaster has never been more important than now.



To learn more on Hurricane debris cleanup and cleanup safety, please visit the [OSHA Hurricane eMatrix](#)

The property data you need for hurricane season



Atlantic Hurricane Season officially starts June 1. However, in recent years, storms have been known to start kicking up their heels off the coast as early as May, getting a speedy start to their meteorological mayhem.

In risk management, COPE is an acronym for “Construction Occupancy Protection and Exposure.” COPE data comes in two categories: primary and secondary. When used in conjunction with a catastrophe modeling tool like AIR or RMS, thorough COPE data can help ensure you have the right coverage whenever a severe weather event pays you a visit.

When you’re talking about the data that insurers and reinsurers need in the case of a hurricane risk event, this mainly concerns the “E” in secondary COPE data.

Primary COPE data details a property’s square footage, its construction materials, any fire protection and its location.

Secondary COPE data drills down within those categories, detailing building structure and how it might behave under adverse weather conditions.

If you are in an area where hurricanes are prevalent, having accurate exposure details becomes a priority. Note that wind and flood insurance are separate policies from standard property insurance.

Your insurance rates are partially based on how well your property can withstand powerful inland winds and storm surges, as well as factors like your geography, the area’s weather history and the Federal Emergency Management Agency’s (FEMA) information.

That involves collecting data related to the features of your property that protect against, and can be affected by, high winds and flooding.

It’s never too early for you to make sure your properties’ COPE data is complete and up-to-date.

When it comes to the wind exposure associated with hurricanes and convective storms, there is a wide array of secondary COPE details that can be important to track for your Property Statement of Values.

They include but are not limited to:

+ Wind resistance of windows

Windows with poor wind resistance are less likely to withstand powerful winds and flying debris, their damage potentially resulting in additional damage to building interiors from both wind impact and precipitation.

+ Sheltered or unsheltered windows

Whether or not a window is sheltered can be another factor of note, particularly in high wind conditions where airborne objects can easily become missiles.

+ Roof framing

The type of framing material used for the roof can affect the roof's ability to remain safely in place during hurricane-force winds.

+ Roof anchors

The type and effectiveness of the connections used to secure the roof support systems to the walls can affect your risk for property damage. Different types can be more effective in areas where hurricanes are prevalent.

+ Roof covering

The type of materials used to cover a roof – for instance, clay tiles versus standard shingles — can affect the severity of damage to a building during a hurricane.

+ Roof geometry

The shape of a roof can be a factor when wind load is a concern. A high steeped roof, for example, will have more wind uplift than a flat roof.

+ Roof parapets and chimneys

Parapets or chimneys are additions to a building structure that can be subject to damage in high winds. Knowing the number of chimneys and parapets a building has and the height in feet of each can be valuable data to keep on hand.

+ Roof age and condition

An older roof can become brittle and might not endure the extremely high winds of a hurricane the way a newer, more flexible, roof would. It's good to know the life of the roof for each of your buildings and how well each is holding up.

+ Wind zone

Based on information from FEMA, the wind zone indicates the tiers of vulnerability a particular area has for natural risk events involving high winds like hurricanes or tornadoes.

+ Mechanical/electrical equipment bracing

The way items like generators and HVAC systems are braced and connected to the building exterior can have an impact on how much damage occurs to a property during high winds.

+ Wind missiles

Some items can become missiles during the high winds of a hurricane. It's important to document these items and their distance from your property.

+ Contents' vulnerability due to wind

Describes the vulnerability of damage due to wind.

+ Cladding type

Cladding is the final layer on an exterior of a building. In the case of hurricanes, it can help prevent weather damage to the frame.

+ Door resistance

How powerfully can the property's doors resist wind and pressure? A door blown in by hurricane wind is the beginning of potential interior and structural damage.

These are just a few of the wind-related details you may wish to document to help create a more accurate picture of your property for your insurance provider. Your agent or provider can provide you with more details to collect specific to your locations and their needs.

SECONDARY COPE DATA RELATED TO FLOODING

Analyzing and updating the COPE data related to flood protection can be a great way to align your property with best practices for your area as hurricane season approaches. With forethought and, if necessary, remediation, you can help avoid worst case scenarios and potentially secure better insurance rates in the process. The recommended best practices for flood protection can vary by location so be sure to contact your underwriter for the information they use to assess your flood risk. You can also check out the flood zone materials on FEMA's website for even more information.

Important secondary COPE details regarding flooding to incorporate into your Statement of Values might include:

+ Flood zone

Based on information from FEMA, the flood zone indicates the tiers of vulnerability that a particular area has for natural risk events involving flooding.

+ Flood protection

This describes the compliance of the building with flood zone requirements in design and construction.

+ Base flood elevation

In a flood zone, a building may be elevated to stand on piles or have high retaining walls to ensure the lowest floor is above the Base Flood Elevation (also called BFE). Structures in flood zones with basements or non-elevated lowest floor living space built prior to current code requirements may prompt worst case scenario insurance ratings.

+ Basement

Detailing whether a structure has a basement and, if so, its level of flood protection can be an important point to include on your SOV, particularly in a hurricane-prone region.

+ Contents' vulnerability due to water

Insurers may want to know just how vulnerable the contents of your property would be if exposed to flooding.

While the items above are common COPE data points for flooding, make sure to check with your insurance provider for the full list of data needed for your policy and your region.

IT'S NOT JUST BLUSTER

Having the right COPE details on hand for your property, specific to wind and flood protection, can be a major help once hurricane season blows in. With a little forethought and a data collection plan, you can make sure your insurance coverage is complete and your ratings aren't gone with the wind.

In conjunction with AssetWorks, Preferred offers free, comprehensive property appraisals to all members that purchase their property insurance from Preferred.



Reporting hurricane claims



KEY HURRICANE-RELATED CLAIMS CONTACTS:

Lianna Crosby

Claims Specialist II

(321) 832-1445 | Lianna.Crosby@pgcs-tpa.com

Fred Tucker

Vice President

(321) 832-1400 ext. 4000 | Fred.Tucker@pgcs-tpa.com

Natalie Bowen

Liability Claims Supervisor

(321) 832-1708 | Natalie.Bowen@pgcs-tpa.com

Monika Coleman, AIC, ARM, AIS

Liability Claims Supervisor

(321) 832-1519 | Monika.Coleman@pgcs-tpa.com

In the event you have storm-related damages you should do the following:

1. Assess damages and prioritize by severity.
2. Mitigate damages whenever possible.
3. Report claims 24/7 using the following:
 - + Toll Free: 1-800-237-6617
 - + Fax: 321-832-1448
 - + Email: Hurricane@pgcs-tpa.com



Please note: When submitting claims, please complete a Property Acord Form and submit with your property schedule indicating the locations that were damaged as this will help identify the locations that were affected.

WHAT HAPPENS NEXT

- PGCS will assign an Engle Martin field adjuster to your claim.
- Engle Martin will contact you within 24 hours. Engle Martin & Associates are independent onsite claims adjusters that are engaged by Preferred. They are the boots on the ground, onsite adjusters. Engle Martin will make initial contacts with members, discuss the claims process and schedule any inspections as needed.
- If you need immediate mitigation help, please let the PGCS adjuster know, and we will have an approved vendor of your choice contact you as soon as possible (see the link to the approved Florida and national recovery/mitigation vendors list on page 16).

FEMA TIPS

When working with FEMA, they will always ask if you've submitted everything through your carrier first. So, our recommendation for working with FEMA is to complete your application and then work with Preferred via Engle Martin/PGCS adjusters through the claims process before submitting any documentation to FEMA.

Working with FEMA can be a tedious process. We have determined over the years that the more complete/detailed your submission package is the smoother the process will be with FEMA.

Once your claim is concluded with Preferred, a detailed payment directive letter will be provided, which will include a damages/deductible worksheet that you can provide to FEMA outlining the entirety of your claim.



Pre- and post-disaster FEMA planning tasks



PRE-DISASTER FEMA PLANNING TASKS:

Strategic – Driven by policy, establishes planning priorities:

- Develop a mitigation plan that establishes post-disaster risk reduction priorities and policies to guide post-disaster recovery and redevelopment.
- Establish pre-disaster priorities and policies to guide recovery and reinvestment across the other Recovery Core Capabilities.
- Develop an inclusive and accessible whole community public engagement strategy.
- Evaluate current conditions, assess risk, vulnerability and potential community-wide consequences.
- Integrate recovery and mitigation goals and policies into other federal, state, regional and community plans.
- Establish priorities and identify opportunities to build resilience, including sustainable development, equity, community capacity and mitigation measures.

Operational – Describes roles and responsibilities, focuses on coordinating and integrating the activities of the whole community:

- Establish clear leadership, operational coordination, and decision-making structures at the local, state, tribal and federal levels.
- Develop pre-disaster partnerships to ensure engagement of all potential resources.
- Identify and engage whole community stakeholders, including the general public, community leaders, faith-based organizations, nonprofit organizations, private-sector entities and health providers (including behavioral health).
- Identify limitations in community recovery management capacity and the means to supplement this capacity, such as training and education, and make it available to all stakeholders.
- Determine roles, responsibilities and resources of whole community partners.
- Establish continuity of operations plans to ensure essential recovery services can be delivered during all circumstances.

Tactical – Identifying specific projects and managing resources:

- Establish specific local procedures, requirements, regulations or ordinances to address specific, expected post-disaster recovery actions.
- Establish specific plans, contracts and resources for expected post-disaster tactical activities (e.g., debris management, recovery management, temporary housing, building permitting).



POST-DISASTER FEMA PLANNING TASKS:

Strategic – Driven by policy, establishes planning priorities:

- Evaluate community conditions, re-assess risk, evaluate needs and forecast future needs and trends.
- Set goals and objectives: short-term, intermediate and long-term; engage the public in the process.
- Identify opportunities to build in future resilience through mitigation.
- Consider standards for sustainable, universally accessible, healthy community design and construction that also integrates mitigation and long-term resilience building activities.
- Ensure policies are inclusive of the whole community, including people with disabilities and others with access and functional needs.

Operational – Describes roles and responsibilities, focuses on coordinating and integrating the activities of the whole community:

- Organize, build on and adapt as necessary, pre-existing plans and priorities, including pre-disaster recovery and mitigation plans.
- Use a community-driven and locally managed process designed to promote local decision making and ownership of the recovery planning and implementation effort.
- Work collaboratively with all groups of people affected by the disaster to promote inclusive and accessible outreach to their communities and address issues relevant to them.
- Ensure inclusion and encourage participation of individuals and communities that may require alternative and/or additional outreach support.
- Keep the public informed on all aspects of recovery and encourage collaboration across partners.
- Implement a coordination structure and build partnerships among local agencies, jurisdictions, and state, tribal and federal governments.
- Develop tools and metrics for evaluating progress against set goals, objectives and milestones.

Tactical – Identifying specific projects and managing resources:

- Identify, adapt, implement and manage actions, procedures, programs, requirements, organizations, regulations, ordinances and policies to address specific needs.
- Identify specific projects in areas of critical importance to the State, region or community's overall recovery.
- Provide well-defined activities and outcomes, including schedules and milestones, aimed at achieving recovery.



Click [here](#) to learn more on FEMA pre and post-disaster recovery planning for local governments.

Disaster recovery & mitigation support



Preferred continues to bring you the response and services you need when disaster strikes. Whether it is a named storm, flooding, fire or any circumstance where you need us, we will be there. First Onsite has partnered with Preferred to be our go-to response team.

- + Emergency response mitigation with 24/7 response day or night, including holidays and weekends
- + Catastrophic storm response
- + Water damage – extraction and removal
- + Drying and dehumidification
- + Fire and smoke damage
- + Odor control/removal
- + Document and contents restoration
- + Temporary power and HVAC services

Please inform the service advisor who answers your call that you are a member of Preferred.



First Onsite Property Restoration
24 Hour Emergency Service for Preferred Members
1-800-622-6433

[Click Here](#) for information on other approved Florida and national recovery/mitigation vendors

Tab G

Additional Required Documents

PROPOSER'S CERTIFICATION

Submit To: City of Wildwood 100 N Main Street Wildwood, FL 34785 352-330-1330		CITY OF WILDWOOD REQUEST FOR QUALIFICATION (RFP) CERTIFICATION AND ADDENDA ACKNOWLEDGMENT	
DUE DATE: 5/16/2023	DUE TIME: 11:00 AM	RFP # 2023 - 10	
TITLE: Property and Casualty Insurance Program			
VENDOR NAME: Brown & Brown of Florida, Inc		PHONE NUMBER: (352) 431-3100	
VENDOR MAILING ADDRESS: 1300 Citizens Blvd Suite 100		FAX NUMBER: (352) 787-9922	
CITY/STATE/ZIP: Leesburg, FL 34748		E-MAIL ADDRESS: Scott.Hindman@bbrown.com	
"I, the undersigned, certify that I have reviewed the addenda listed below (list all addenda received to date). I understand that timely commencement will be considered in award of this RFP and that cancellation of award will be considered if commencement time is not met, and that untimely commencement may be cause for termination of contract. I further certify that the services will meet or exceed the RFP requirements. I, the undersigned, declare that I have carefully examined the RFP, specifications, terms and conditions as applicable for this Request, and that I am thoroughly familiar with all provisions and the quality and type of coverage and services specified. I further declare that I have not divulged, discussed, or compared this RFP with any other Offeror and have not colluded with any Offerors or parties to an RFP whatsoever for any fraudulent purpose."			
<u>1</u>	<u>2</u>		
Addendum #	Addendum #	Addendum #	Addendum #
"I certify that this quote is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting an RFP for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this response and that the offer is in compliance with all requirements of the RFP, including but not limited to certification requirements. In conducting offers with an agency for "CITY", respondent agrees that if this RFP is accepted, the respondent will convey, sell, assign, or transfer to the City of Wildwood all rights, title and interest in and to all causes of action it may now or hereafter acquire under the anti-trust laws of the United States for price fixing relating to the particular commodities or services purchased or acquired by the CITY. At the City of Wildwood discretion, such assignment shall be made and become effective at the time the purchasing agency renders final payment to the respondent."			
Scott Hindman, Senior Vice President _____ Authorized Agent Name, Title (Print)		 _____ Authorized Signature	5/15/23 _____ Date
<i>This form must be completed and returned with your Submittal</i>			

PROPOSALS FORM FOR CITY OF WILDWOOD

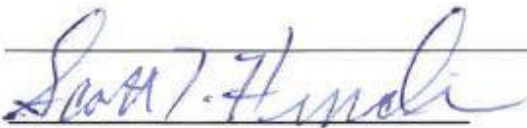


Name of Firm Submitting Proposals Brown & Brown of Florida, Inc

Name of Person Submitting Proposals Scott T. Hindman

PROPOSER ACKNOWLEDGMENT

"The undersigned hereby declares that he/she has informed himself/herself fully in regard to all conditions to the work to be done, and that he/she has examined the RFP and Specifications for the work and comments hereto attached. The Vendor proposes and agrees, if this submission is accepted, to contract with the City of Wildwood to furnish all necessary materials, equipment, labor and services necessary to complete the work covered by the RFP and Contract Documents for this Project. The Vendor agrees to accept in full compensation for each item the prices named in the schedules incorporated herein."



Signature

5-15-23

Date

RFP # 2023-10

RFP Number

[☐] Check if exception(s) or deviation(s) to Specifications. Attach separate sheet(s) detailing reason and type for the exception or deviation.

This document must be completed and returned with your Submittal

Statement of Terms and Conditions

PUBLIC ENTITY CRIME: A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Proposal/Bid on a contract to provide any goods or services to a public entity, for the construction or repair of a public building or public work, may not submit Proposals/Bids on leases of real property to a public entity, may not be awarded or perform work as a Consultant, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

INDEMNIFICATION: The consultant shall indemnify and hold harmless the City of Wildwood and their elected officials, employees, agents, representatives, and volunteers from and against any and all claims, damages, losses and expenses, (including legal costs), or liabilities based on third party claims of injury to persons or damage to property arising out of or resulting, in whole or in part, from a negligent act or omission or willful misconduct of consultant or its employees, Subcontractors, agents or representatives.

PROHIBITION OF LOBBYING: During the blackout period which is, the period between the time the submittals for invitation to bid or the Request for Proposals, or Proposals, or information, as applicable, are received at Contracts / Purchasing and the time the City awards the contract, no proposer, no lobbyist, principal, or other person may lobby, on behalf of a competing party in a particular procurement matter, any member of the City, or any City employee other than Cassandra Smith in writing via email to csmith@wildwood-fl.gov. Violation of this provision may result in disqualification of violating party. All questions regarding this Request for Proposals (RFP) or Invitation to Bid (IBD) must be submitted in writing to the City's Financial Services Manager.

ANTI TRUST LAWS: By submission of a signed RFP or BID, the successful Vendor acknowledges compliance with all antitrust laws of the United States and the State of Florida, in order to protect the public from restraint of trade, which illegally increases prices.

CONFLICT OF INTEREST: The award of the contract hereunder is subject to the provisions of Chapter 112 of the Florida Statutes. Vendors shall disclose the name of any Officer, Director, Partner, Associate, or Agent who is also an Officer, Appointee, or Employee of any of the City's at the time of the RFP or BID, or at the time of occurrence of the Conflict of Interest thereafter.

INTERPRETATION, CLARIFICATIONS AND ADDENDA: No oral interpretations will be made to any vendor as to the meaning of the RFP/BID Contract Documents. Any inquiry or request for interpretation received by Cassandra Smith in writing via email to csmith@wildwood-fl.gov before the date listed herein will be given consideration. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, will be distributed at or after the Pre-Proposals/Pre-Bid Conference, mailed or sent by available or electronic means to all attending prospective Submitters prior to the established RFP/BID opening date. Each Vendor shall acknowledge receipt of such addenda in the space provided. In case any Proposer/Bidder fails to acknowledge receipt of such addenda or addendum, his offer will nevertheless be construed as though it had been received and acknowledged and the submission of his bid will constitute acknowledgment of the receipt of same. All addenda are a part of the RFP/BID FORMS and each Proposer/Bidder will be bound by such addenda, whether or not received by him. It is the responsibility of each proposer/bidder to verify that he has received all addenda issued before RFP's/BID's are opened. In the case of unit price items, the quantities of work to be done and materials to be furnished under this RFP/BID Contract are to be considered as approximate only and are to be used solely for the comparison of RFP's/BID's received. The City and/or its CONSULTANT do not expressly or by implication represent that the actual quantities involved will correspond exactly therewith; nor shall the Vendor plead misunderstanding or deception because of such estimate or quantities of work performed or material furnished in accordance with the Specifications and/or Drawings and other Proposals/Bid Documents, and it is understood that the quantities may be increased or diminished as provided herein without in any way invalidating any of the unit or lump sum prices bid.

GOVERNING LAWS AND REGULATIONS: The vendor is required to be familiar with and shall be responsible for complying with all federal, state and local laws, ordinances, rules and regulations that in any manner affect the work.

PROPRIETARY/CONFIDENTIAL INFORMATION: Vendors are hereby notified that all information submitted as part of, or in support of RFP's/BID's, will be available for public inspection ten days after opening of the RFP's/BID's or until a short list is recommended whichever comes first, in compliance with Chapter 119, and 287 of the Florida Statutes. All RFP's/BID's submitted in response to this solicitation become the property of the City. Unless information submitted is proprietary, copy written, trademarked, or patented, the City reserves the right to utilize any or all information, ideas, conceptions, or portions of any RFP/BID, in its best interest.

TAXES: The City of Wildwood is exempt from any taxes imposed by the State and/or Federal Government. Exemption certificates will be provided upon request.

NON-COLLUSION DECLARATION: By signing this RFP/BID, all Vendors shall affirm that they shall not collude, conspire, connive or agree, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the work for which their RFP/BID has been submitted; or to refrain from bidding in connection with such work; or have in any manner, directly or indirectly, sought by person to fix the price or prices in the RFP/BID or of any other Bidder, or to fix any overhead, profit, or cost elements of the RFP/BID price or the RFP/BID price of any other Bidder, or to secure through any collusion, conspiracy, conspiracy, or unlawful agreement any advantage against any other Bidder, or any person interested in the proposed work.

PROPOSER RESPONSIBILITY: Invitation by the City's to vendors is based on the recipient's specific request or as the result of response by the public to the legal advertisements required by State law. Firms or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.

CITYSHIP OF SUBMITTALS: All responses, inquiries or correspondence relating to or in reference to this RFP/BID, and all other reports, charts, displays, schedules, exhibits and other documentation submitted by the vendors will become the property of the City. Reference to literature submitted with a previous RFP/BID will not relieve the Bidder from including any required documents with this RFP/BID.

EXAMINATION OF BID DOCUMENTS: Each Bidder shall carefully examine the RFP/BID Document to ensure all pages have been received, all drawings and/or Specifications and other applicable documents are included, and shall inform himself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the CONSULTANT will in no way relieve him of the obligations and responsibilities assumed under the Contract.

VENDOR RESPONSIBILITY: Vendors are fully and completely responsible for the labeling, identification and delivery of their submittals. The City of Wildwood will not be responsible for any mislabeled or misdirected submittals, nor those handled by delivery persons, couriers, or the US Postal Service.

DRUG FREE WORKPLACE: All Proposers/Bidders shall submit the enclosed, duly signed and notarized form entitled "Drug Free Workplace Certificate". The Drug Free Workplace Vendor shall have the burden of demonstrating that his program complies with Section 287.087 of the Florida Statutes, and any other applicable state law.

THE CITY OF WILDWOOD, is a political subdivision of the State of Florida, and reserves the right to cancel this RFP and to reject any and/or all submittals, reserve the right to waive any and all informalities or irregularities, to re-advertise with either the identical or revised specifications, and reserve the right to award contracts and/or in the best interest of the City. Submittals not meeting stated minimum terms and Proposals may be rejected by the City as non-responsive. The City reserves the right to reject any or all submittals without cause. The City reserves the right to reject the submission of any Vendor in arrears or in default upon any debt or contract to the City, or who has failed to perform faithfully any previous contract with the City's or with other governmental agencies.

PUBLIC RECORDS LAW: Correspondence, materials and documents received pursuant to this RFP/BID become public records subject to the provisions of Chapter 119, Florida Statutes.

VERIFICATION OF TIME: Verizon time is hereby established as the Official Time of the City's.

PREPARATION OF PROPOSALS/BIDS:

Signature of the Bidder: The Bidder must sign the RFP/BID FORMS in the space provided for the signature. If the Proposer/Bidder is an individual, the words "doing business as _____" must appear beneath such signature. In the case of a partnership, the signature of at least one of the partners must follow the firm name and the words, "Member of the Firm" should be written beneath such signature. If the Proposer/Bidder is a corporation, the title of the officer signing the RFP/BID on behalf of the corporation must be stated and evidence of his authority to sign the RFP/BID must be submitted. The Proposer/Bidder shall state in the RFP/BID FORMS the name and address of each person interested therein.

Basis for Bidding: The price proposed for each item shall be on a lump sum or unit price basis according to specifications on the RFP/BID FORM. The proposed prices shall remain unchanged for the duration of the Contract and no claims for cost escalation during the progress of the work will be considered, unless otherwise provided herein.

Total Proposed Price/Total Contract Sum Proposed: If applicable, the total price bid for the work shall be the aggregate of the lump sum prices proposed and/or unit prices multiplied by the appropriate estimated quantities for the individual items and shall be stated in figures in the appropriate place on the RFP/BID FORM. In the event that there is a discrepancy on the RFP/BID FORM due to unit price extensions or additions, the corrected extensions and additions shall be used to determine the project bid amount.

TABULATION: Those wishing to receive an official tabulation of the results of the opening of this RFP/BID are to submit a self-addressed, stamped business size (No. 10) envelope, prominently marked on the front lower left side, with the RFP identification. Tabulation requested by telephone, fax or electronic media will not be accepted.

OBLIGATION OF WINNING BIDDER: The contents of the RFP/BID of the successful proposer/bidder will become contractual obligations if acquisition action ensues. Failure of the successful Proposer/Bidder to accept these obligations in a contract may result in cancellation of the award and such vendor may be removed from future participation.

AWARD OF BID: It is the City's intent to select a vendor within sixty (60) calendar days of the deadline for receipt of Proposals/Bids. However, Proposals/Bids must be firm and valid for award for at least ninety (90) calendar days after the deadline for receipt of the RFP/BID.

ADDITIONAL REQUIREMENTS: The firms shall furnish such additional information as the City may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The City reserves the right to make investigations of the Proposals of the firm as it deems appropriate.

PREPARATION COSTS: The City shall not be obligated or be liable for any costs incurred by Proposers/Bidders prior to issuance of a contract. All costs to prepare and submit a response to this RFP/BID shall be borne by the Proposer/Bidder.

TIMELINESS: All work will commence upon authorization from the City's representative. All work will proceed in a timely manner without delays. The Consultant shall commence the work UPON RECEIPT OF NOTICE TO PROCEED and/or ORDER PLACED (PURCHASE ORDER PRESENTED), and shall deliver in accordance to the terms and conditions outlined and agreed upon herein.

DELIVERY: All prices shall be FOB Destination, Sumter County, Florida, inclusive delivery unless otherwise specified.

ADDITIONAL SERVICES/PURCHASES BY OTHER PUBLIC AGENCIES ("PIGGY-BACK")

The Vendor by submitting a Bid acknowledges that other public Agencies may seek to "Piggy-back" under the same terms and conditions, during the effective period of any resulting contract - services and/or purchases being offered in this bid, for the same prices and/or terms proposed. Vendor has the option to agree or disagree to allow contract Piggy-backs on a case-by-case basis. Before a Public Agency is allowed to Piggy-Back any contract, the Agency must first obtain the vendor's approval - without the vendor's approval, the seeking Agency cannot Piggy-Back.

PLANS, FORMS & SPECIFICATIONS: Bid Packages are available from the "CITY". These packages are available for pickup or by mail. If requested to mail, the Proposer/Bidder must supply a courier account number (UPS, FedEx, etc.). Proposers/Bidders are required to use the official RFP/BID FORMS, and all attachments itemized herein, are to be submitted as a single document. Any variation from the minimum specifications must be clearly stated on the RFP/BID FORM and/or Exceptions/Deviations Sheet(s). Only one set of plans, forms, and specifications will be furnished each company or corporation interested in submitting a Proposal/Bid. RFP/BID FORM documents for this project are free of charge and are available on-line and are downloadable.

MANUFACTURER'S NAME AND APPROVED EQUIVALENTS: Any manufacturer's names, trade names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition unless otherwise indicated. The Proposer/Bidder may offer any brand for which he is an authorized representative, which meets or exceeds the RFP/BID specification for any item(s). If RFP's/BID's are based on equivalent products, indicate on the RFP/BID FORM the manufacturer's product name and literature, and/or complete specifications. Reference to literature submitted with a previous RFP/BID will not satisfy this provision. The Proposer/Bidder shall explain in detail the reasons why the proposed equivalent will meet the specifications and not be considered an exception thereto. RFP's/BID's which do not comply with these requirements are subject to rejection. RFP's/BID's lacking any written indication of intent to quote an alternate brand will be received and considered in complete compliance with the specifications as listed on the RFP/BID FORM. The "CITY" is to be notified, in writing, of any proposed changes in materials used, manufacturing process, or construction. However, changes shall not be binding upon the "CITY" unless evidenced by a Change Notice issued and signed by the "CITY", or designated representative.

QUANTITIES: The quantities as specified in this RFP/BID are estimates only and are not to be construed as guaranteed minimums.

SAMPLES: Samples of items, when called for, shall be furnished free of expense, and if not destroyed may, upon request, be returned at the Proposer's/Bidder's expense. Each sample shall be labeled with the Proposer's/Bidder's name, manufacturer brand name and number, RFP/BID number and item reference. Samples of successful Proposer's/Bidder's items may remain on file for the term of the contract. Request for return of samples shall be accompanied by instructions which include shipping authorization and must be received at time of opening. Samples not returned may be disposed of by the "CITY" within a reasonable time as deemed appropriate.

DOCUMENT RE-CREATION: Vendor may choose to re-create any document(s) required for this solicitation, but must do so at his own risk. All required information in the original "CITY" format must be included in any re-created document. Submittals may be deemed non-responsive if required information is not included in any re-created document.

ACKNOWLEDGMENT:



(Signature and Date)

*This document must be completed and returned
with your Submittal*

HOLD HARMLESS AGREEMENT

The Consultant agrees to hold the City of Wildwood harmless against all claims for bodily injury, sickness, disease, death or personal injury or damage to property or loss of use of property arising out of or resulting, in whole or in part, from a negligent act or omission or willful misconduct of consultant or its employees, Subcontractors, agents or representatives.

The Consultant shall purchase and maintain workers' compensation insurance for all workers' compensation insurance and employers' liability in accordance with Florida Statute Chapter 440.

The Consultant shall also purchase any other coverage required by law for the benefit of employees.

Required insurance shall be documented in Certificates of Insurance and shall be provided to the City representative requesting the service.

By signature upon this form the Consultant stipulates that he/she agrees to the Hold Harmless Agreement, and to abide by all insurance requirements.

Scott T. Hindman

Consultant-Print Name



Signature

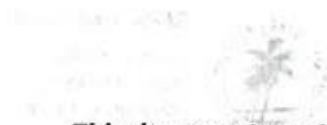
Property and Casualty RFP

Project Name

05/09/2023

Date

The effective date of this Hold Harmless Agreement shall be for the duration of this project.



This document must be completed and returned with your Submittal

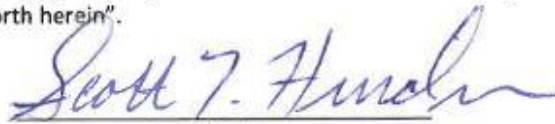
DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that,

Brown & Brown of Florida, Inc.

(print or type name of firm)

- Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
- Informs employees about the dangers of drug abuse in the work place, the firm's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
- Gives each employee engaged in providing commodities or contractual services that are under RFP or bid, a copy of the statement specified above.
- Notifies the employees that as a condition of working on the commodities or contractual services that are under RFP or bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, plea or guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
- Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.
- "As a person authorized to sign this statement, I certify that the above named business, firm or corporation complies fully with the requirements set forth herein".



Authorized Signature

05/09/2023

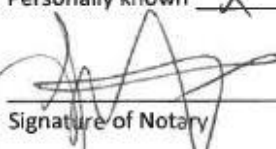
Date Signed

State of: FL

County of: LAKE

Sworn to and subscribed before me this 15 day of May, 20 23

Personally known ☒ or Produced Identification _____
(Specify Type of Identification)


Signature of Notary

My Commission Expires 5/23/2025

(seal)



SARA J. MCCLAIN
Notary Public
State of Florida
Comm# HH133047
Expires 5/23/2025

This document must be completed and returned with your Submittal

**SWORN STATEMENT TO SECTION 287.133(3)(a),
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES FORM**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL
AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to City of Wildwood Scott T. Hindman, Senior Vice President
By _____
{print individual's name and title}

for Brown & Brown of Florida, Inc.
{print name of entity submitting sworn statement}

whose business address is 1300 Citizens Blvd Suite 100 Leesburg, FL 34748

and (if applicable) its Federal Employer Identification Number (FEIN) is 59-0691921 (If the entity
has no FEIN, include the Social Security Number of the individual signing this sworn
statement: _____.)
2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), **Florida Statutes**, means a
violation of any state or federal law by a person with respect to and directly related to the transaction of
business with any public entity or with an agency or political subdivision of any other state or of the United
States, including, but not limited to, any bid or contract for goods or services to be provided to any public
entity or an agency or political subdivision of any other state or of the United States and involving antitrust,
fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), **Florida Statutes**, means
a finding of guilt or a conviction of a public entity crime, with or without adjudication of guilt, in any federal
or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as
a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), **Florida Statutes**, means:
 - a. A predecessor or successor of a person convicted of a public entity crime; or
 - b. An entity under the control of any natural person who is active in the management of the entity and
who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors,
executives, partners, shareholders, employees, members, and agents who are active in the
management of an affiliate. The ownership by one person of shares constituting a controlling interest
in another person, or a pooling of equipment or income among persons when not for fair market value
under an arm's length agreement, shall be a prima facie case that one person controls another person.
A person who knowingly enters into a joint venture with a person who has been convicted of a public
entity crime in Florida during the preceding 36 months shall be considered an affiliate.
 - c. I understand that a "person" as defined in Paragraph 287.133(1)(e), **Florida Statutes**, means any natural
person or entity organized under the laws of any state or of the United States with the legal power to
enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or
services let by a public entity, or which otherwise transacts or applies to transact business with a public
entity. The term "person" includes those officers, directors, executives, partners, shareholders,

employees, members, and agents who are active in management of an entity.

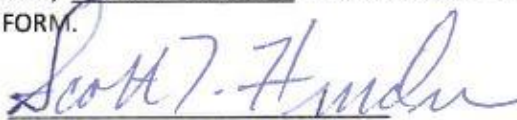
- d. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. **(indicate which statement applies.)**

X Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. **{attach a copy of the final order}**

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.



{signature}

05/09/2023

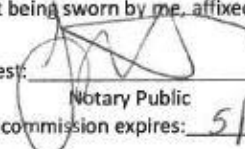
{date}

State of FL

County of LAKE

PERSONALLY APPEARED BEFORE ME, the undersigned authority, SARA MCCLAIN, who after first being sworn by me, affixed his/her signature in the space provided above on this 15 day of MAY, 2023

Attest:


Notary Public

My commission expires: 5/23/2025

(Notary Seal)



SARA J. MCCLAIN
Notary Public
State of Florida
Comm# HH133047
Expires 5/23/2025

This document must be completed and returned with your Submittal

Conflict of Interest Disclosure Form

I HEREBY CERTIFY that

2. I (printed name) Scott T. Hindman am the
(title) Senior Vice President and the duly authorized representative of the firm of (Firm Name)
Brown & Brown of Florida, Inc. whose address is
1300 Citizens Blvd Suite 100 Leesburg, FL 34748
and that I possess the legal authority to make this affidavit on behalf of myself and the firm
for which I am acting; and,

2. Except as listed below, no employee, officer, or agent of the firm have any conflicts of interest, real or apparent, due to ownership, other clients, contracts, or interests associated with this project; and,

3. This bid Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid Proposal for the same services, and is in all respects fair and without collusion or fraud.

EXCEPTIONS (List)

Signature: 

Printed Name: Scott T. Hindman

Firm Name: Brown & Brown of Florida, Inc.

Date: 05/09/2023

State of FL

County of LAKE

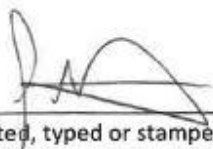
Sworn to and subscribed before me this 15 day of MAY 2023

Personally Known ☒
OR Produced Identification _____, Type of Identification _____

My Commission Expires 5/23/2025



SARA J. MCCLAIN
Notary Public
State of Florida
Comm# HH133047
Expires 5/23/2025


(Printed, typed or stamped commissioned name of notary)

THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR PROPOSALS PACKAGE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

05/16/2023

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 Brown & Brown of Florida, Inc. P O BOX 2412 Daytona Beach FL 32114	CONTACT NAME: Jayne McGraw PHONE (A/C, No, Ext): (386) 239-5757 FAX (A/C, No): (386) 239-6190 E-MAIL ADDRESS: Jayne.McGraw@bbrown.com																					
INSURED BROWN & BROWN INC ET AL Po Box 2412 Daytona Beach FL 32115	<table><tr><th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr><tr><td>INSURER A:</td><td>Travelers Property Casualty Company of America</td><td>25674</td></tr><tr><td>INSURER B:</td><td>XL Specialty Insurance Company</td><td>37885</td></tr><tr><td>INSURER C:</td><td>The Continental Insurance Company</td><td>35289</td></tr><tr><td>INSURER D:</td><td>The Charter Oak Fire Insurance Company</td><td>25615</td></tr><tr><td>INSURER E:</td><td>The Travelers Indemnity Company</td><td>25658</td></tr><tr><td>INSURER F:</td><td></td><td></td></tr></table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A:	Travelers Property Casualty Company of America	25674	INSURER B:	XL Specialty Insurance Company	37885	INSURER C:	The Continental Insurance Company	35289	INSURER D:	The Charter Oak Fire Insurance Company	25615	INSURER E:	The Travelers Indemnity Company	25658	INSURER F:		
INSURER(S) AFFORDING COVERAGE		NAIC #																				
INSURER A:	Travelers Property Casualty Company of America	25674																				
INSURER B:	XL Specialty Insurance Company	37885																				
INSURER C:	The Continental Insurance Company	35289																				
INSURER D:	The Charter Oak Fire Insurance Company	25615																				
INSURER E:	The Travelers Indemnity Company	25658																				
INSURER F:																						

COVERAGES**CERTIFICATE NUMBER:** 23004**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	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:			TC2JGLSA-9527B874-TIL-23	01/01/2023	01/01/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY			TC2JGLSA-9527B874-TIL-23	01/01/2023	01/01/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ 50,000
C	☒ UMBRELLA LIAB ☒ EXCESS LIAB ☐ DED ☐ RETENTION \$			60111849429	01/01/2023	01/01/2024	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
D	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	UB-1R870198-23-51-K	01/01/2023	01/01/2024	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	INS AGENTS E&O			US00106979EO23A	01/01/2023	01/01/2024	EA WRONGFUL ACT 20,000,000 AGGREGATE 20,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)NAMED INSURED: BROWN & BROWN OF FLORIDA, INC.
FOR INFORMATION**CERTIFICATE HOLDER****CANCELLATION**

BROWN & BROWN OF FLORIDA INC 1300 CITIZENS BLVD STE 100 LEESBURG FL 34748	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
---	---

© 1988-2015 ACORD CORPORATION. All rights reserved.



AGENCY CUSTOMER ID: _____

LOC #: _____

ADDITIONAL REMARKS SCHEDULE

Page ____ of ____

AGENCY Brown & Brown of Florida, Inc.		NAMED INSURED BROWN & BROWN INC ET AL
POLICY NUMBER		
CARRIER	NAIC CODE	EFFECTIVE DATE:

ADDITIONAL REMARKS**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,****FORM NUMBER:** 25 **FORM TITLE:** Certificate of Liability Insurance: Notes

INSURER A-WORKERS COMPENSATION-POLICY UB-UB-1R861269-23-51-R-EFF 1-1-23 TO 1-1-24, LIMITS 1,000,000/1,000,000/1,000,000 - COVERS AZ, WI, MA

THE UMBRELLA POLICY IS FOLLOW FORM OVER THE GENERAL LIABILITY, AUTO LIABILITY, AND EMPLOYERS LIABILITY

Immigration Affidavit Certification

This Affidavit is required and should be signed, notarized by an authorized principal of the firm, and submitted with formal Invitations to Bid (ITB's) and Request for Proposals (RFP) submittals. Further, Consultants / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment, at the time of the submission of the Consultant's/bidder's proposal. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company. Failure to include this Affidavit and acceptable evidence of enrollment in the E-Verify program may deem the Consultant / Bidder's proposal as nonresponsive.

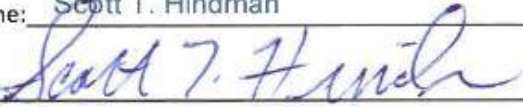
The City of Wildwood will not intentionally award City contracts to any Consultant who knowingly employs unauthorized alien workers, constituting a violation of the employment provision contained in 8 U.S.C. Section 1324 a(e) Section 274A(e) of the Immigration and Nationality Act ("INA").

The City of Wildwood may consider the employment by any Consultant of unauthorized aliens a violation of Section 274A (e) of the INA. Such Violation by the recipient of the Employment Provisions contained in Section 274A (e) of the INA shall be grounds for unilateral termination of the contract by the City of Wildwood.

Consultant attests that they are fully compliant with all applicable immigration laws (specifically to the 1986 Immigration Act and subsequent Amendment(s)) and agrees to comply with the provisions of the Memorandum of Understanding with E-Verify and to provide proof of enrollment in The Employment Eligibility Verification System (E-Verify), operated by the Department of Homeland Security in partnership with the Social Security Administration at the time of submission of the Consultant's / Bidder's proposal.

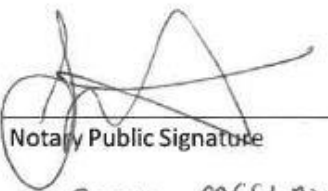
Company Name: Brown & Brown of Florida, Inc.

Print Name: Scott T. Hindman Title: Senior Vice President

Signature:  Date: 05/09/2023

State of FL County of LAKE

The foregoing instrument was signed and acknowledged before me this 15 day of may, 2023, by Scott Hindman who has produced Personally known as identification.
(Print or Type Name) (Type of Identification and Number)



Notary Public Signature
SARA MCCLAIN
Printed Name of Notary Public

HH133047
5/23/2025

Notary Commission Number/Expiration
SARA J. MCCLAIN
Notary Public
State of Florida
Comm# HH133047
Expires 5/23/2025



The signee of this affidavit guarantees, as evidenced by the affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

QUALIFICATIONS SUMMARY
CITY OF WILDWOOD
REQUEST FOR PROPOSALS
WORKERS' COMPENSATION, PROPERTY AND CASUALTY INSURANCE
RFP NO. 2023-10

1. Agent/Broker Name: Scott T. Hindman
2. Agency or Firm Name: Brown & Brown of Florida, Inc.
3. Address: 1300 Citizens Blvd Suite 100 Leesburg, FL 34748
4. Email: Scott.Hindman@bbrown.com
5. Telephone: (352) 431-3100
6. Number of Years in Business: 84
7. Number of Public Entities Served: Leesburg Office: 52 / Brown & Brown: 100+
8. Number of Municipalities Served in Florida: Leesburg Office: 8 / Brown & Brown: 40+
9. What is your Florida Premium Volume: Public Entities: \$250M + / Total FL Premium Volume \$1.5B +
10. Do you have experience in placing property coverage for similar sized entities? If yes, please list the name(s) of the entities/municipalities and type of insurance provided.
Our Leesburg Office of Brown & Brown specializes in providing property & casualty
coverage for public entities throughout the State of Florida. Some notable local clients
include: Sumter Schools, Village Center Community Districts, Lake County, and Leesburg.
11. List key personnel who will be assigned to the City's account, including name, licenses held and years of experience in servicing public entity accounts. Attach additional sheet if necessary.
Scott T. Hindman, CIC - 215 & 220 Licenses, 30+ years of public entity experience
Tyler D. Brandeburg - 215 & 220 Licenses, 8 years of public entity experience
Sara J. McClain - 220 & 620 Licenses, 5 years of public entity experience

Additional Comments:
We have enjoyed working with the City of Wildwood for many years and appreciate
the opportunity to continue earning your business moving forward. Thank you!



ORIGINAL

CITY OF

WILDWOOD

Request for Proposal
Property and Casualty Insurance Program

Presented by:
Jon Rivera
VP, Risk Consultant

20 N. Orange Avenue, #500,
Orlando, FL 32801
P: (407) 445-2414
F: (407) 445-2868
www.wrmlc.com



WORLD
Risk Management

A BALLATOR COMPANY

TABLE OF CONTENTS

TAB	SUBJECT	PAGE NUMBER
A.	STATEMENT OF INTEREST	1
B.	"VENDOR" PROFILE	2
C.	PROPOSAL SUBMITTAL FORM	5
D.	CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES	13
E.	REFERENCES	30
F.	ADDITIONAL INFORMATION	31
G.	ADDITIONAL REQUIRED DOCUMENTS	85



TAB A: STATEMENT OF INTEREST

City of Wildwood
100 N. Main Street
Wildwood, FL 34785



RE: Request for Proposal – Property & Casualty Insurance Program

To whom it may concern:

On behalf of World Risk Management [WRM], we would like to extend our gratitude to the City of Wildwood [City] for the opportunity to demonstrate our capabilities and team qualifications for its “Request for Proposal: Property & Casualty Insurance Program”. PRM is proud to be a strategic partner for its members and our team is committed to delivering that same successful partnership to the City.

WRM understands that each public entity is unique and the City of Wildwood deserves specific attention to its unique insurance and risk management needs. As we understand those unique needs, we have crafted a specialized program that positions the City of Wildwood in the best possible scenario. This scenario includes exceptional support and services, the most comprehensive coverage form available on the market, and a stable total cost of risk.

The WRM agency is comprised of individuals of the highest integrity and quality that bring hundreds of combined years of experience in the Public Entity, Brokerage, and Risk Management arena. Additionally, WRM is the authorized administrator of Public Risk Management of Florida [PRM], one of the state’s premier municipal insurance programs and the proposed insuring company. WRM has strategically placed itself among leading municipal insurance firms, garnering exclusive working relationships and leveraging economies of scale – ensuring that our members are maximizing their coverage options, receiving the highest quality of services, in the most cost-effective manner possible.

We are confident that this response to the RFP demonstrates WRM’s exceptional competence in the evaluation categories referenced and why our company is the strategic choice for the City of Wildwood moving forward. We sincerely appreciate the opportunity to present the unique capabilities of our company to the City in a finalist interview. Should the evaluation committee have any questions or need further clarification, please do not hesitate to contact us. Thank you.

Jonathan Rivera
Vice President, Risk Management Consultant
World Risk Management
20 N. Orange Ave Suite 500
Orlando, FL 32801
P: 407-445-2414
F: 407-445-2868
Jon.rivera@wrmlc.com
www.wrmlc.com



TAB B: VENDOR PROFILE

FORM 1

“VENDOR” PROFILE

Submitted by (Company Name): Accretive Global Insurance Services, LLC dba World Risk Management

Corporation Partnership Individual Joint Venture

Other Describe: Limited Liability Corporation

Florida Contractor License Number: L112319 Expiration Date:

Office Location: 20 N. Orange Ave Suite 500 Orlando, FL 32801

Number of people in your organization: 15

Length of time the Contractor has been doing business under this name in Florida: 1 years

Length of time your firm has provided services to governmental clients: 16+ years

Under what other name(s) has your firm operated: World Risk Management, LLC (2007-2022)

Has or is your firm currently involved in any formal court proceedings regarding any of your contracts?

YES (attach a detailed explanation)

NO



TAB B: VENDOR PROFILE

FLORIDA DEPARTMENT of FINANCIAL SERVICES
ACCRETIVE GLOBAL INSURANCE SERVICES, LLC

WORLD RISK MANAGEMENT
20 N. ORANGE AVE., STE. 500
ORLANDO FL 32801

Agency License Number L112319

Location Number: 4

Issued On 03/16/2021

Pursuant To Section 626.0428, Florida Statutes, This Agency Location Shall Be In The Active Full-Time Charge Of A Licensed And Appointed Agent Holding The Required Agent Licenses To Transact The Lines Of Insurance Being Handled At This Location.

Pursuant To Subsection 626.172(4), Florida Statutes, Each Agency Location Must Display The License Prominently In A Manner That Makes It Clearly Visible To Any Customer Or Potential Customer Who Enters The Agency Location.

Jimmy Patronis
Chief Financial Officer
State of Florida



TAB B: VENDOR PROFILE

State of Florida Department of State

I certify from the records of this office that ACCRETIVE GLOBAL INSURANCE SERVICES, LLC is a Delaware limited liability company authorized to transact business in the State of Florida, qualified on January 13, 2021.

The document number of this limited liability company is M21000000857.

I further certify that said limited liability company has paid all fees due this office through December 31, 2023, that its most recent annual report was filed on March 2, 2023, and that its status is active.

I further certify that said limited liability company has not filed a Certificate of Withdrawal.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Fourth day of May, 2023*




Secretary of State

Tracking Number: 9582312004CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>



TAB C: PROPOSAL SUBMITTAL FORM

PROPOSAL SUBMITTAL FORM

Coverage		Limit	Deductible
Property	Buildings & Contents	\$46,910,531	\$1,000
	New Locations	\$25,000,000	Included
	Accounts Receivable	Included	Included
	Business Income	Included	No separate deductible
	Boiler and Machinery	\$50,000,000	\$1,000 or \$10,000
	Errors and Omissions	\$25,000,000	No separate deductible
	Additional Expense	\$50,000,000	No separate deductible
	Demolition & Increased Cost of Construction	Incl./\$25,000,000	No separate deductible
	Windstorm	\$75,000,000	5% Per Affected Unit
	Flood	\$50,000,000	\$1,000 or Max NFIP Limits
Total Premium			\$250,670

****PRM Property Program Terms, Conditions, & Sub-limits are subject to change**

Proposed Agent/Broker: Accretive Global Insurance Services, LLC dba World Risk Management

Proposed Insurer: Public Risk Management of Florida

Insurer A.M. Best Rating: Not Rated - Insurance Pool.
Reinsurers are all Am Best A Rated

Will coverage be provided on a Guaranteed Replacement Cost Basis?

Buildings	Yes <u>X</u>	No _____
Personal Property	Yes <u>X</u>	No _____
Contractors/Mobile Equipment	Yes <u>X</u>	No _____
Boiler and Machinery	Yes <u>X</u>	No _____

Can replacement structures be built on alternative sites? Yes X No _____

Will there be additional premium for newly acquired properties? Yes _____ No X

Is Coinsurance % Required? If so, please provide percentage. Yes _____ No X

Is there a sub-limit for windstorm coverage? Yes X No _____



TAB C: PROPOSAL SUBMITTAL FORM

How are appurtenant structures and/or property in the open to be covered?

PRM covers these items at full replacement cost.

List all locations that will be **excluded** for windstorm and hail.

Proposal includes windstorm and hail on all scheduled locations. City can elect to exclude coverage on certain locations if so desired.

	Coverage	Limit	Deductible
INLAND MARINE	Blanket Unscheduled Inland Marine	\$1,000,000	\$1,000
	Scheduled Inland Marine	\$780,606	\$1,000
	Total Premium	Included	

Proposed Agent/Broker: Accretive Global Insurance Services, LLC dba World Risk Management

Proposed Insurer: Public Risk Management of Florida

Insurer A.M. Best Rating: Not Rated - Insurance Pool.
Reinsurers are all Am Best A Rated

	Coverage	Limit	Deductible
CRIME	Forgery and Alteration	\$500,000	\$1,000
	Theft, Disappearance or Destruction	\$500,000	\$1,000
	Computer Fraud/Funds Transfer Fraud	\$500,000	\$1,000
	Employee Dishonesty	\$500,000	\$1,000
	Total Premium	Included	

Proposed Agent/Broker: Accretive Global Insurance Services, LLC dba World Risk Management

Proposed Insurer: Public Risk Management of Florida

Insurer A.M. Best Rating: Not Rated - Insurance Pool.
Reinsurers are all Am Best A Rated

Is faithful performance included? Yes X No



TAB C: PROPOSAL SUBMITTAL FORM

DEADLY WEAPON PROTECTION	Coverage	Limit	Deductible
	Third Party Liability Coverage	\$2,000,000	\$10,000
	Crisis Management Services	\$250,000	\$10,000
	Counseling Services	\$250,000	\$10,000
	Funeral Expenses		
		Total Premium	Included

Proposed Agent/Broker: Accretive Global Insurance Services, LLC dba World Risk Management

Proposed Insurer: Lloyds of London - Hiscox

Insurer A.M. Best Rating: A XV

GENERAL LIABILITY	Coverage	Limit	Deductible
	General Liability	\$1,000,000	\$0
	Employee Benefits Liability	\$1,000,000	\$0
	Law Enforcement Liability	\$1,000,000	\$0
		Total Premium	231,805

Proposed Agent/Broker: Accretive Global Insurance Services, LLC dba World Risk Management

Proposed Insurer: Public Risk Management of Florida

Insurer A.M. Best Rating: Not Rated - Insurance Pool.

Reinsurers are all Am Best A Rated

Is coverage being provided on an Occurrence or Claims basis? Claims Made - 10/01/2023

Retroactive Date

Are third party sewer back up claims covered? Yes X No

AUTOMOBILE	Coverage	Limit	Deductible	Symbol
	Automobile Liability	\$1,000,000	\$0	2
	Uninsured Motorist	Excluded		
	Medical Payments	Excluded		
	Physical Damage: Comprehensive	Included	\$1,000	2
	Physical Damage: Collision	Included	\$1,000	2
	Hired Auto Physical Damage	Excluded		
		Total Premium	Included in GL	



TAB C: PROPOSAL SUBMITTAL FORM

Proposed Agent/Broker: Accretive Global Insurance Services, LLC dba World Risk Management

Proposed Insurer: Public Risk Management of Florida

Insurer A.M. Best Rating: Not Rated - Insurance Pool.
Reinsurers are all Am Best A Rated

Is Non-Owned and Hired Auto coverage being offered? Yes X No

Are employee take-home vehicles required to be scheduled and declared? Yes X No

Is auto liability coverage limited to employees acting within the scope of duty? Yes X No

	Coverage	Limit	Annual Aggregate	Deductible
PUBLIC OFFICIALS AND EMPLOYMENT PRACTICES LIABILITY	Public Officials Liability	\$1,000,000	\$3,000,000	\$0
	Employment Practices Liability	\$1,000,000	\$3,000,000	\$0
	Cyber Liability	\$1,000,000	\$1,000,000	\$50,000
	Injunctive Relief/Non-Monetary Claims	\$100,000	\$100,000	\$0
			Total Premium	Included

Proposed Agent/Broker: Accretive Global Insurance Services, LLC dba World Risk Management

Proposed Insurer: Public Risk Management of Florida

Insurer A.M. Best Rating: Not Rated - Insurance Pool.
Reinsurers are all Am Best A Rated

Is coverage being provided on an Occurrence or Claims Made basis?

Claims Made Basis

Are claims requesting injunctive relief or seeking non-monetary damages paid on behalf or on a reimbursement basis?

Paid on behalf



TAB C: PROPOSAL SUBMITTAL FORM

Does coverage extend to:

Commission Members? Yes X No _____
Appointed Officers? Yes X No _____
Employees? Yes X No _____
Volunteers? Yes X No _____

Are defense costs in addition to the aggregate limit of liability?

Yes _____ No X

	Coverage	Limit	Retention
WORKERS' COMPENSATION	Workers' Compensation	Statutory	\$0
	Employers Liability	\$2,000,000	\$0

Proposed Agent/Broker: Accretive Global Insurance Services, LLC dba World Risk Management

Proposed Insurer: Public Risk Management of Florida

Insurer A.M. Best Rating: Not Rated - Insurance Pool.
Reinsurers are all Am Best A Rated

Are full Workers' Compensation Statutory limits being proposed? Yes X No _____

Who will administer claims? Johns Eastern Company



TAB C: PROPOSAL SUBMITTAL FORM

PROPOSAL SUMMARY

Premium Summary - 2023-2024	
Annual Premium - Property (Including Flood Coverage)	\$ 250,670 .
Annual Premium - Inland Marine	\$ Included in Prop .
Annual Premium - Crime	\$ Included in Prop .
Annual Premium - General Liability	\$ 231,805 .
Annual Premium - Law Enforcement Liability	\$ Included in GL .
Annual Premium - Public Officials and Employment Practices Liability	\$ Included in GL .
Annual Premium - Cyber Liability	\$ Included in GL .
Annual Premium - Automobile	\$ Included in GL .
Annual Premium - Workers Compensation	\$ 139,912 .
TOTAL ANNUAL PREMIUM FOR ALL COVERAGES QUOTED	\$ 622,388 .

Is there a two-year rate guarantee? Yes X No _____

Two year rate guarantee is subject to less than a 30% incurred loss ratio as of 06/30/2024

What are the City's obligations upon termination of policy (notice, run-out claims, etc.)?

The City must provide a 45 day notice via a resolution that it is considering withdrawal from the program. 10 days written notice of actual withdrawal.

PRM will continue to handle claims to closure in the event the City leaves the program. Additional costs may apply, cost to be determined at effective date of withdrawal.



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

Public Risk Management of Florida contracts with Johns Eastern Company for Third Party Administrative services and handling of all member claims within Public Risk Management of Florida. Johns Eastern is renowned as one of the premier Public Entity Third-Party Administrators in the country. PRM has a dedicated and experienced team of licensed adjusters and supervisors who possess all the skills needed to successfully handle PRM's claims in a prompt, courteous and cost-effective manner. Each claim is managed ensuring tight loss control, adequate claim reserves, accurate loss payments, strict administrative expense supervision and superb customer service.

Aside from the City's exposures, claims performance is the next largest variable impacting premium costs. Understanding that, if we are fortunate to be awarded the City's business, we would recommend coordinating a meeting between City staff and our Claims Administrator, Johns Eastern. Allowing the City to meet, in-person, the claims staff that they will be working with on a day-to-day basis which will allow for the development of great synergy between the two which should ultimately reflect in improved claims handling.

Additionally, we recommend meeting quarterly to conduct a claims review to keep the City apprised on the status of their claims as well as to strategize on bringing the City's complex claims to closure in the most cost-effective manner.

The costs for claims administration services are included as part of the premium paid to PRM.

REPORTING PROCEDURES:

The preferred method of reporting workers' compensation claims to PRM is by means of the On-Line First Report of Injury (iFROI), via our TPA, Johns Eastern. Accessible via the Internet through the Johns Eastern website, claims can be reported at each location of the organization or control can be maintained by entering all losses in the risk management department. Access is controlled by the use of one or more passwords. Our web application is supported on mobile devices with HTML 5 compliant browsers, including Chrome, Firefox, Safari, Internet Explorer 11, Microsoft Edge and many more.

The iFROI is essentially an electronic DWC-1 which can be completed and transmitted at the client's convenience. The computer-controlled edits and validations help ensure that proper responses and fully completed notices are submitted directly to our database. This allows for rapid setup of the claim, immediate contacts can be made and investigations started. Upon submission, a control number is displayed. This control number is generated by the database upon acceptance of the FROI record, and is the client's assurance that the information was successfully received by us. The insured will have the option of printing a FROI recap of submitted information which the injured employee can sign for the employer's files. In addition, a medical authorization, fraud statement, and a pharmacy authorization card will print with the FROI. All hard copies of the DWC-1 will be generated and mailed by Johns Eastern.

The preferred method of reporting property, general liability and automobile liability losses to PRM is by filling out the First Notice of Loss on the Johns Eastern website, which enables our clients to quickly report claims electronically 24 hours a day, 7 days a week, 365 days a year. Once the form has been completed, a visual confirmation is displayed, assuring the client that the data was successfully transmitted to Johns Eastern. Johns Eastern is also able to receive liability loss reports and FROIs by



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

fax, email, and telephone. Claims reported telephonically are entered directly into our claim system at the time they are reported, and if additional information is required, our support staff will follow up with our clients' contacts.

INTAKE AND CLAIMS INVESTIGATION:

We believe early intervention is the key to successful claims handling. All First Notice of Loss reports and On-Line First Report of Injury [iFROIs] will be reviewed by the Johns Eastern account supervisors and assigned to the appropriate adjuster upon receipt. The initial supervisory notes will be entered into the system upon claim setup to guide the adjuster and are available for client review online.

Once the file has been set up successfully, the City is immediately sent an email acknowledgment with a copy of the assignment to the handling adjuster. This acknowledgment must contain in the Subject Line the client's claim number, name of insured and date of loss/injury.

A detailed initial investigation is completed for all claims. Initial contacts and investigation begin within 24 hours of claim receipt. For liability claims, the adjuster contacts all involved parties and works to obtain all relevant police reports, photos of the incident scene, and other pertinent information to establish the facts of the case. For workers' compensation claims, the adjuster contacts the injured employee, employer and physician. All bodily injury, lost time and questionable medical only claims are reported to the Index Bureau.

Within 48 hours, a case file analysis is completed by the adjuster to guide the handling of the claim. The case file analysis is a management plan for each file that analyzes all important issues and allows the development of an action plan to bring the claim to conclusion. This analysis is then reviewed through the Johns Eastern diary system on a regular basis to ensure both the proper completion of tasks, and the updating of the action plan as more facts become known. Realistic reserves are established within five days of claim receipt utilizing analytics as a guide and an initial status report is completed within 14 business days. The account supervisor reviews all new claims for appropriate direction in claims handling. All communication is clearly documented in the file notes.

The City will be provided on-line access to the Johns Eastern claims system and will have real time access to the status of each of their claims.

Effective and cost-efficient claims management requires a multiprong approach that begins with having a quality team of claims professionals in place to administer your claims. PRM has a dedicated claims adjusting staff with a proven track record of providing swift resolution in a cost-effective manner to all claims handled.

Secondly, communication and relationship building are key to effective claims management. PRM prides itself on providing exemplary customer service to its members and our dedicated claims staff champions that customer service-oriented philosophy on every claim handled. They demonstrate their service orientation to our members through timely, responsive communications.

SETTLEMENT PHILOSOPHY:

PRM endeavors to resolve every claim as quickly and cost-effectively as possible. However, there is no cookie-cutter approach to the settlement of claims. Each claim is unique, as are the facts and dynamics



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

surrounding the claim. There are times when settlement is appropriate and other times when defense of PRM and the City's position is warranted. The one constant is the PRM Member's involvement throughout any potential settlement or defense of the claim. While the PRM By-Laws require that our members be apprised of any claim settlements of \$10,000 or greater, PRM takes great pride in its engagement and communication with its members. Any potential settlement will be discussed with the City prior to finalizing.

Included claims management services. Online Portal, Claims Reviews and Reports

PRM has claim analysts dedicated to providing oversight and management of all claims. While claims are reviewed daily to ensure appropriate progression in the claim adjudication process, we recommend that City staff participate in quarterly or bi-annual claim reviews. This helps the City stay abreast of their current claims experience. Additionally, it provides additional opportunity for PRM and the claims management team to glean insight from the City on its position regarding more complex claims. The additional engagement and communication typically facilitates more desirable outcomes.

While PRM has standard operating procedures in terms of the claims handling guidelines in place, each PRM member is unique. As such, PRM works with each member to develop specific claims handling guidelines to meet their individual needs. If we were fortunate enough to be awarded this contract, we would meet with the City to develop the City-specific claims handling guidelines.

PRM provides a full suite of adhoc and customized loss reports in order to give its members greater insight and visibility into the claims they are experiencing and to identify any trends that could negatively impact the City's efforts to reduce its TCOR. Annually, PRM will conduct a Stewardship report with the City to discuss claim trends, successes and opportunities for improvement.

Sample reports are available on pages 17-18. Please note that these samples are not all-inclusive. Additionally, if needed, we have the capability to create custom reports for the City depending on the City's needs.

Absolutely! PRM is a member-driven pool and we work at the pleasure of our members. We recognize City staff often wears multiple hats and is relying on our specific expertise. That said, we encourage our members to be as engaged as they are able. PRM has contractual relationships with a panel of defense firms for all lines of coverage offered within this proposal. Their services are provided on an hourly basis and are covered as part of the loss for a covered claim. Our defense partners are well versed in public entity exposures and bring a high level of expertise to our members ensuring swift and cost-effective resolution of claims they are involved in.

Should the City desire to work with a firm/attorney that is not currently contracted with PRM, we will make every attempt to accommodate the City's request, subject to an agreement that the attorney and/or firm adhere to the PRM provider rates.

Online Risk Management Information System [RMIS]

AIM 3.0 is the Johns Eastern state-of-the-art, web-based claims system that stores all the dates, descriptions and other facts associated with a claim. But beyond that, it is a tool that actively assists the adjuster in working that claim.



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

Its many user-friendly features include:

- Web-based claims system developed using Microsoft Visual Basic.net
- Claims information organized into tables and stored in an SQL database
- “Alerts” that can be set on a claim to help the adjuster remain aware of certain situations
- “Warnings” which display if a claim reaches certain conditions
- “Reminders” that can be set to trigger on a particular date
- “Client Notes” that can be input right to the claim file, with notification to the adjuster.
- Advanced diary system to ensure each claim is examined periodically at a customizable interval
- Tool to assist in properly setting the reserves on a claim
- Tools for calculating any potential recoveries
- Litigation module which tracks legal expenses and all upcoming depositions, mediations, and hearings in the litigation calendar
- Imaged documents in paperless environment sorted by category
- Medicare Screens to document the status of the Query and identify Medicare recipients
- Limits which can be set to allow supervisors to monitor the progression of each claim’s resolution
- Email capabilities within the claim file
- Client-customizable dashboards to view pertinent program metrics
- Instant messaging within AIM 3.0

AIM 3.0 claims application works with any HTML 5-compliant browser. The full functionality of the system, including claim entry, is supported on all devices including mobile phones. There is no extra cost for this. In addition, AIM 3.0 can be accessed 24/7 via the Johns Eastern website at no additional charge. This enables members insured through PRM to have anytime access for multiple users to all of their claims information, providing a comprehensive view of all the details, payments, expenses, medical bills, reserves, adjuster notes, supervisor notes, diary items and more, in real time.

Johns Eastern maintains a library of reports which are available to be run and delivered to the City monthly, or at a frequency of their choosing. These reports have been developed to best illustrate claims handling progress to the insured. If we do not have the desired report in our library, we may be able to create it. Johns Eastern maintains an Information Services department to support the needs of our staff and our clients. We can build a custom report to suit nearly any requirements.

The Johns Eastern Ad Hoc reporting system allows our clients to access their claims and payment data in real time. This system not only provides the ability to run standard reports, but to also design and save your own custom reports by creating a query (or data filter) to arrive at the answer you want. Once a report is run, it can be output to many formats, including Excel, PDF and HTML. The system allows you to schedule reports and have them delivered at a specific time or run them on an as-needed basis. The system also allows you to e-mail the generated reports.

Claims Review

In addition to the assigned adjusters on each member claim and the Johns Eastern management staff, PRM utilizes in house claims specialists to monitor all claims that come through PRM. This team provides Claims Advocacy services as part of our core services to our members. We maintain close involvement with the adjuster as well as every member, ensuring the quality and responsiveness of



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

our customer service and claims handling.

Periodically, PRM will conduct a claims review with our members to ensure that the member's claims are being handled appropriately. Additionally, the PRM supervisor will maintain a diary on every City claim. The diary will notify the Supervisor to do a complete file review to ensure that the claim file is appropriately reserved and that there is adherence to the Action Plan to bring the file to closure.

Johns Eastern management also conducts internal branch office audits annually. Audits are conducted on a random selection of files, either open or closed. Files are selected based on reserve and injury type. A sampling of claim types are audited, with approximately 10% of adjuster claims volume reviewed annually.

Claims will be audited based on the following parameters: adherence to initial investigation procedures and benchmarks, thoroughness of medical documentation, timeliness of appointment scheduling, accuracy and timeliness of indemnity payments, timeliness of excess reporting and reimbursement follow-up, reserving accuracy, timeliness, and relevance of 90-day audits, attorney interaction, Medicare, adherence to and quality of diary, and timely filing of forms.

Within two weeks of completing the audit, a detailed report is provided to the TPA operations manager and Executive Vice President. Results are discussed with the adjusters once the audit results have been approved by Senior Management.

Case Loads

The industry standard for average case count for lost time adjusters is between 150-160 claims. PRM endeavors to keep the average case count around 115 claims with a maximum case load count of 130 claims. The industry standard for average case count for liability adjusters is between 175-185 claims. PRM endeavors to keep the average case count around 130 claims with a maximum case load count of 150 claims. Furthermore, PRM verifies their adjuster case load on a weekly basis ensuring that the maximum case load policy is adhered to ensuring our adjusters have the capacity to provide the City's claims with the time and attention needed to bring those claims to resolution in a timely and cost-effective manner.



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

Johns Eastern Company, Inc.

Test Company

Page 157 of 159

Loss Run by Claim Detail

Valuation :04/30/2016

Begin Period Date: 4/1/2016 Financials As Of 4/30/2016

Run Date: 05/10/2016 04:28 PM

Report Criteria: Filter: Tier 2 Name = 'Test Company (W)' and Loss Year >= '2010' and Line of business = 'Workers Compensation' and Client = 'Test Company' and Policy Set = Y

Group 1: Claim Year / Policy Age: Claim year 2016 01/01/16 - 12/31/2016 Policy Age: 3 Months

Group 2: Party Current Coverage Type: Medical Only

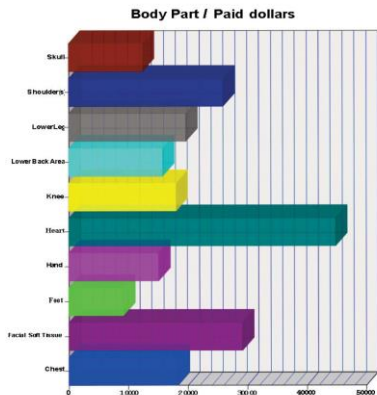
Group 1: Party Coverage - Storage Type: Medical Only												
Claimant Claim Number	Div/Dept Adjuster	Loss Date Opened Date	Closed Date Reopen Date	Party Status Coverage	Nature of Injury Body Part	Received Date (Class Code if claim is WC) Loss Cause	Description of Loss					
efmray, Tracy 729597	PUBLIC SAFETY/FIRE RESCUE Lissa inobet	04/28/2016 04/29/2016		Open Medical Only	No Physical Injury Lower Arm	Absorption, Ingestion or Inhalation, NOC	While responding to traffic accident, patient was laying on ground with a significant laceration to the					
								Reserve Type:	Paid in period	Paid to date	Reserve Balance	Inured
								Expense	\$0.00	\$0.00	\$250.00	\$250.00
								Medical:	\$0.00	\$0.00	\$750.00	\$750.00
								Claim Total:	\$0.00	\$0.00	\$1,000.00	\$1,000.00
& + ti zodbmie, Jazlyn 729609	PUBLIC SAFETY/FIRE RESCUE Lissa inobet	04/28/2016 04/29/2016		Open Medical Only	No Physical Injury Lower Arm	Absorption, Ingestion or Inhalation, NOC	While responding to a vehicle accident, found patient with arterial bleeding from head laying in					
								Reserve Type:	Paid in period	Paid to date	Reserve Balance	Inured
								Expense	\$0.00	\$0.00	\$250.00	\$250.00
								Medical:	\$0.00	\$0.00	\$750.00	\$750.00
								Claim Total:	\$0.00	\$0.00	\$1,000.00	\$1,000.00
& + em coin, Thomas 729612	PUBLIC SAFETY/FIRE RESCUE Lissa inobet	04/28/2016 04/29/2016		Open Medical Only	No Physical Injury Unclassified - Insufficient info to	Absorption, Ingestion or Inhalation, NOC	Exposure to blood on intact skin from HIV positive patient.					
								Reserve Type:	Paid in period	Paid to date	Reserve Balance	Inured
								Expense	\$0.00	\$0.00	\$250.00	\$250.00
								Medical:	\$0.00	\$0.00	\$750.00	\$750.00
								Claim Total:	\$0.00	\$0.00	\$1,000.00	\$1,000.00
Group 2: Medical Only Totals												
					Reserve Type:	Closed PTD	Open PTD	All Paid to Date	Reserve Balance	Inured		
					Expense:	\$119.60	\$157.77	\$277.37	\$4,892.23	\$5,169.60		
					Medical:	\$5,479.18	\$5,850.43	\$11,329.61	\$14,087.34	\$25,416.95		
					Total:	\$5,598.78	\$6,008.20	\$11,606.98	\$19,979.57	\$30,586.55		
Claim Count:	Open: 17	In period: 9	Closed: 10	In period: 5	Total Claims:	27						



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

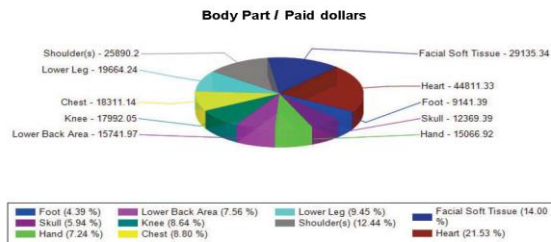
AD HOC SAMPLE REPORTS
(Workers' Compensation)

Top 10 Paid To Date Totals By Body Part
(2016-17 Policy Year)

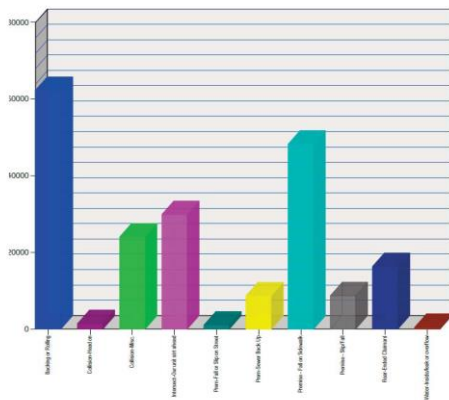


BODY_PART	WC - Total PTD
Heart Total	\$44,811.33
Facial Soft Tissue Total	\$29,135.34
Shoulder(s) Total	\$25,890.20
Lower Leg Total	\$19,664.24
Chest Total	\$18,311.14
Knee Total	\$17,992.05
Lower Back Area Total	\$15,741.97
Hand Total	\$15,066.92
Skull Total	\$12,369.39
Foot Total	\$9,141.39

Top 10 Paid To Date Totals By Body Part
(2016-17 Policy Year)



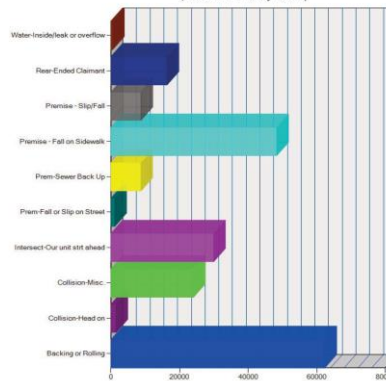
Top 10 Paid To Date Totals By Cause (Liability)
(2016-17 Policy Year)



Loss_Cause	LB - Total PTD
Backing or Rolling Total	\$62,294.27
Premise - Fall on Sidewalk Total	\$48,270.69
Intersect-Our unit srt ahead Total	\$29,876.28
Collision-Misc. Total	\$24,036.71
Rear-Ended Claimant Total	\$16,316.58
Premise - Slip/Fall Total	\$8,719.90
Prem-Sewer Back Up Total	\$8,685.51
Collision-Head on Total	\$1,441.55
Prem-Fall or Slip on Street Total	\$1,066.90
Water-Inside/leak or overflow Total	\$450.03

AD HOC SAMPLE REPORTS (Liability)

Top 10 Paid To Date Totals By Cause
(2016-17 Policy Year)



Loss_Cause	LB - Total PTD
Backing or Rolling Total	\$62,294.27
Premise - Fall on Sidewalk Total	\$48,270.69
Intersect-Our unit srt ahead Total	\$29,876.28
Collision-Misc. Total	\$24,036.71
Rear-Ended Claimant Total	\$16,316.58
Premise - Slip/Fall Total	\$8,719.90
Prem-Sewer Back Up Total	\$8,685.51
Collision-Head on Total	\$1,441.55
Prem-Fall or Slip on Street Total	\$1,066.90
Water-Inside/leak or overflow Total	\$450.03



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

PRM ANCILLARY SERVICES:

Public Risk Management of Florida [PRM] has been providing insurance for government entities for approximately 34 years. The PRM membership is comprised of cities, towns, counties, airport authorities and water districts. As the administrators of the PRM program, the WRM team brings over 100 combined years of experience in the public entity arena on program design, insurance placements, risk management, etc.

PRM is led by Robbie Chartier, former County Administrator for Okeechobee County Board of County Commissioners. She previously served on the PRM Board of Directors for 22 years, spending the last 7 years as the Chair for the PRM Executive Board. She has served in Florida Government for nearly 31 years and served as County Administrator for Okeechobee County the last 10 years prior to joining PRM.

PRM has loss control and safety specialists throughout the state ready to assist the City as needed to identify known exposures as well as lesser-known exposures.

PRM, with the City's assistance, will conduct a Risk/Safety Review of the City's formal and informal Risk Management practices and procedures. Included in the review, but not limited to:

- Review of external/internal forms, reporting processes and procedures;
- Review of Accident & Injury Investigation processes, procedures and documentation;
- Review of written Safety policies, rules and procedures;
- Assistance in establishing a Safety Committee;
- Safety Inspections with a focus on preventative maintenance and documentation;

Additionally, PRM provides a full suite of services to assist the City with all its risk management needs. While comprehensive, the list below is not all-inclusive. Except for Disaster Recovery Services, these services have been in place for many years. ***PRM will continue to provide all these services indefinitely at no additional cost.***

Claims Advocacy – In addition to the Claims Advocacy provided by the recommended insuring program, PRM; WRM will serve as the claim advocate for the City on all claims reported, or for those lines of coverage where we are the current broker of record. Services will include, but are not limited to:

- Addressing any issues concerning applicable coverage
- Reviewing and assisting with coverage issues/rebuttals
- Reviewing and assisting in a response to reservation of rights
- Assisting in expediting the claim handling process

The City-WRM team will work in conjunction with PRM to coordinate and conduct periodic claim reviews and reserve analysis on all open claims to determine appropriateness of claim strategy and course of action retrospectively and prospectively. Additionally, we will assist on any complex claims and litigation cost management matters as needed.

Safety Training – PRM will provide a Loss Prevention Review periodically, or as needed at no additional cost. This service is a review of the City's formal and informal Risk Management practices and procedures. Included in the review, but not limited to:

- Review of external/internal forms, reporting processes and procedures;
- Review of Accident & Injury Investigation processes, procedures and documentation;
- Review of written Safety policies, rules and procedures;
- Assistance in establishing a Safety Committee;
- Safety Inspections with a focus on preventative maintenance and documentation;



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

Law Enforcement Hotline – PRM provides a Law Enforcement Hotline at no cost to its members. The hotline is available 24 hours a day, 7 days a week. The hotline provides immediate expert advice to minimize the impact of a critical incident on items such as, but not limited to:

- Questionable violation of civil rights
- Use of deadly force
- Use of excessive force
- Wrongful arrest
- High speed chase resulting in injuries or death

Employment Practices Hotline – PRM provides an Employment Practices Hotline at no cost to its members. PRM has developed a consultation program with the firm of Allen, Norton & Blue whereby members can seek timely legal advice regarding specific employment issues within their respective organizations. The program covers matters involving claims or potential claims of illegal discrimination, denial of due process and other matters involving potential violations of employment related laws that apply to Florida Public Employers.

Learning Management System [LMS] – PRM provides access to First Net Learning and Training Network Now at no costs to its members. The City will have access to a full suite of training modules and/or safety videos to be utilized as a training tool for the end user or to be assigned to City staff.

PRM understands that Public Agencies are facing unprecedented and continually evolving challenges. As a result, PRM has partnered with Lexipol to provide The PoliceOne Academy Online Training Resource for municipal police. The PoliceOne Academy LMS includes Course of the Month Schedule, Training Tracking Tools, Report Features and much more. There are no additional costs to the City to take advantage of these resources.

Disaster Recovery Services – ***Please note that while these services are available through PRM, members are not obligated to utilize the PRM preferred vendor. PRM is sensitive to the utilization of local vendors and/or existing partnerships, and its primary goal is facilitating and expediting recovery for the City after a loss by whatever means possible.***

PRM can provide Disaster Recovery Services and Emergency Remediation Services through NorthStar Recovery Services. NorthStar Recovery Services is the nation's premier disaster recovery company and largest environmental remediation company in the world. NorthStar Recovery Services partners with two of the largest vendors in their respective fields, United Rentals and Stanley Steemers, allowing them first right of refusal on critical equipment rental during catastrophic events.

A unique feature included as part of this service at no cost is a Pre-Loss Assessment [PLA]. This feature was created to provide the City an opportunity to meet with NorthStar Recovery Services in a “non-emergency” situation to facilitate operational planning and assist in the crafting of effective and cost-efficient responses. The PLA will allow collection of the following key data/information:

- Floor Plans/Site Plans
- Vendor/Utility Points of Contact
- Engineering Run Outs
- Infrastructure Parameters
- Power Generation
- HVAC
- Heating
- Utility Cut Outs/Emergency Securing Locations (Gas, Water)

From there NorthStar will determine how they can “Plug Into” the facility to sustain critical infrastructure to ensure seamless integration. This includes placement and connection points for:



TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

- Power
- Chill Water
- Steam/Heat

NorthStar will engage City staff every step of the way to detail the PLA Planning Process, identify the most critical “Top 15-20” facilities, collect and forward data on all facilities, etc. All the data gathered in relation to the execution of the PLA process is uploaded to a secured cloud platform for access by authorized City staff at any time. Additionally, the PLA process is complemented with the production of the “Pre-Loss Assessment Compendium”. This is a living document containing a compilation of all the data gathered on all the City’s properties and is updated as new data is received. This singularly consolidated document contains the following:

- Facility Executive Summary (“Quick Read” for responding Operations and Project Managers);
- Pre-Loss Assessment Data Form;
- Photo Logs;
- Facility Data (Site Plans, Floor Plans, Utility Runouts, Inspection Reports, Asbestos Surveys, etc.);
- Facility Spatial Mapping to include: - Proximity of City’s facilities to First Responders;
 - Proximity to NorthStar resources (Assets, Offices, etc.);
 - Key NorthStar Strategic Partners (Stanley Steemer, United Rentals);
 - Hazards;

Post PLA Process Planning, NorthStar Recovery Services will work with the City to develop a custom Operational Standard Operating Procedure to ensure maximum readiness in the event of a catastrophic event.

Should the City be impacted by a catastrophic event, the City can utilize the Emergency Response number, available 24 hours a day, 7 days a week, to have a Rapid Response Team deployed. After the collection of some necessary data and arrival of the Rapid Response Team, the Operations Manager will begin coordinating with Vendor Management and Equipment Management to allocate resources to the affected City locations. Please note that the Rapid Response Team can typically arrive on-site within 2 hours of notification, but no later than 12 hours.

NorthStar’s Emergency Response Equipment is contained in pre-positioned locations throughout the State/Country. These trailers are fully stocked with the required materials and equipment to respond to a wide range of losses in a moment’s notice. These trailers are stocked with equipment such as LGR Dehumidifiers, air movers, consumables (trash bags, PPE, etc.), basic power distribution, and large water trash pumps, all of which are necessary to mitigate the damages caused by a variety of loss types. Additionally, NorthStar Recovery Services will provide a full communications suite enabling the City usage of phone and internet via satellite.

During the remediation process, supervisors will be assigned to manage via Line-of-Sight 1-10-person labor force each, based on the scope of work, and will be responsible for performing tasks necessary to stabilize and recover the facility as dictated by the Project Manager and Scope of Work. The supervisor will host a “Daily Huddle” to discuss safety protocols for the day’s tasks with the labor force. Daily logs will be completed by each Supervisor to establish

what tasks are being performed as well as tasks that have been completed. These will be submitted per shift to the Project Manager to aid in the construction of the “Daily Update”.

NorthStar Recovery Services has thoroughly vetted Licensed Top-Quality Providers and only utilizes the most qualified and experienced labor providers in the area of operation. Licensing and Certification requirements are stringent to ensure that only the most qualified labor providers are included in the NorthStar network. Costs for services are paid through the program with any applicable deductible(s) invoiced back to the City by PRM.

While comprehensive, but not all inclusive, additional details regarding the services and/or resources available to the City via the PRM program can be found on the following pages 22-26.

Comprehensive Services



Risk Analysis

On-site risk analysis services are provided for members to identify potential loss producing hazards and to assist with regulatory compliance. A Risk Analysis includes a review of the following:

- Record-Keeping Analysis
- Written Program Requirements
- Physical Hazards Identification
- Training Needs

Regulatory Assistance

Numerous safety-related, technical resources are available to assist members in complying with a multitude of State & Federal regulations such as the following:

- Compliance Assistance & Guidance
- Regulatory Interpretations
- Post-Audit Consultations

Technical Assistance

PRM offers a myriad of special services as part of the Loss Prevention Program.

- Detailed Loss & Hazard Analysis
- Safety Committee Setup & Participation

Loss Trending

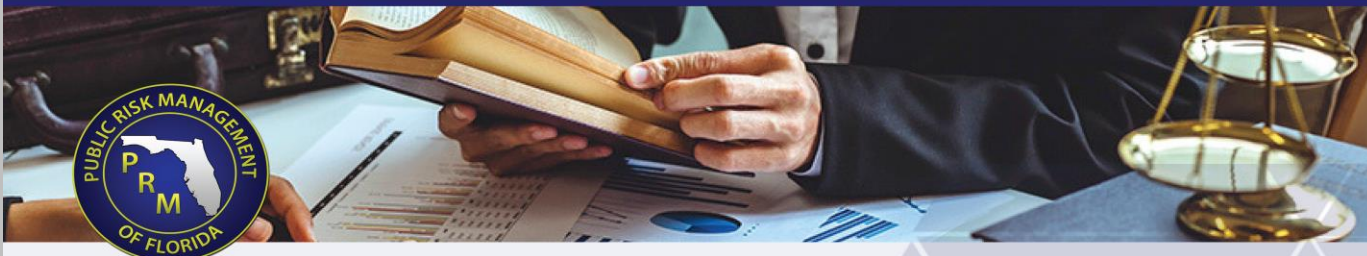
PRM Loss Prevention Staff discusses individual concerns and provides results-oriented solutions for each member.

- Injury Frequency Trending
- Comparative Analysis with Other Members/Market

5-Year Appraisal Services

- No cost to membership
- Appraisals every 5 years to provide accurate insurable values which can change year to year based on replacement cost index inflation
- Report provides accurate secondary wind characteristics underwriting data for property insurance carriers

Loss Control & Prevention



PRM staff has the experience and expertise to work with each member in meeting their individual needs with customized training. Loss Control Resources are outlined below and include (2) types of online training video platforms, a video library, workshops and seminars, customized onsite training and programs such as comprehensive safety and employment practices reviews.

**ALL LOSS CONTROL RESOURCES ARE INCLUDED FREE OF CHARGE AS A
PREFERRED MEMBER OF PUBLIC RISK MANAGEMENT OF FLORIDA.**

Insurance Discount Programs

- Safety Credit Program
- Drug-Free Workplace Program

Risk Analysis Programs

- Human Resources Loss Control Review
- Risk Management/Safety Loss Prevention Review
- Loss Analysis
- Facilities Inspection

Professional Legal Resources

- Employment Law Consultation Services
- HR/Supervisory Roundtable Events
- Safety Webinars
- HR Law and Solutions Seminar
- Law Enforcement Liability available 24/7

Learning Resources

- Safety Talks
- Legislative/Compliance Update Email "Blasts"
- Quarterly Newsletter
- Onsite Training - Customized to the needs of your entity
- Member Surveys

What is a Loss Prevention Review?

PRM's Risk/Safety Review is a review of your organization's formal and informal Risk Management practices and procedures.

Areas of Review Include:

Claims: External and internal forms, reporting process and procedures.

Safety Program:

- Accident & Injury Investigation - process, procedures, documentation
- Safety Policy - written policy, rules and procedures
- Safety Committee - role, responsibility, purpose and goals
- Safety Inspections - preventative maintenance, documentation and follow up infrastructure (sidewalks)
- Record keeping - process, procedure and documentation
- Review of annual training schedule
- * List not all encompassing

Getting Started:

Contact a PRM Loss Prevention Consultant (LPC) to discuss your needs. Once a review has been completed, your LPC will arrange a meeting with you to discuss recommendations. PRM can also assist by providing sample policies or documents that meet necessary State and Federal compliance requirements.

PRE-DEFENSE REVIEW

PRM offers two Pre-Defense Review Programs (PDRs): *Law Enforcement Pre-Defense Review Program* and *Employment Practices Pre-Defense Review Program*. Using a PDR can prevent your agency from being the focus of a lawsuit. Our legal experts will provide you with immediate and timely advice to help contain issues for both Law Enforcement and Employment Practices.

Dayes Law Firm, PLLC

Andrew I. Dayes
Office: (727) 240-1332
Cell: (727) 479-9739
Email: aid@dayeslaw.com
Available 24/7

Shelton|McKean

Sean Conahan
Office: (727) 316-6363
Email: sconohan@sheltonmckean.com

Law Enforcement Pre-Defense Review

Law Enforcement activities may result in a need for immediate legal advice. We recommend using a PDR in the following situations:

- Injury/ Death
- Questionable Civil Rights Violations/ Wrongful Arrests
- Use of Excessive/ Deadly Force
- High Speed Chase resulting in injuries/ death
- Any Incident involving Injury, Death or Constitutional Rights in a County Jail or Municipal Holding Facility

For a Law Enforcement Pre-Defense Review, please contact one of the attorneys listed above. When calling, please mention that you're an active PRM member.



Employment Practices Pre-Defense Review Program

Employment Practice activities may result in a need for immediate legal advice. We recommend using the PDR in the following situations:

Allen, Norton & Blue

Brian Koji
Office: (813) 251-1210
Email: bkoji@anblaw.com

- Before Terminating an Employee
- Receipt of Pre-Suit Notice
- Harassment/Discrimination Allegations
- FMLA Issues
- Denial of Due Process
- All matters involving potential violations of employment related laws

For an Employment Practices Pre-Defense Review, please contact the attorney listed above. When calling, please mention that you're an active PRM member.

TAB D: CLAIMS MANAGEMENT SERVICES AND ANCILLARY SERVICES

SEMINARS AND TRAINING



Law Enforcement Liability

PRM sponsors an annual Law Enforcement Liability Seminar that covers current issues relevant to our criminal justice professionals. The seminar not only provides recent case law but presents the subject matter with practical applications and an open discussion among the participants. Presented by professionals with expertise in the field.

HR & Supervisory Roundtable

PRM sponsors an annual HR & Supervisory Roundtable event presented by professionals with expertise in the field. Human Resource Staff, managers, and supervisors receive up-to-date employment-related information on current issues and an opportunity to ask questions about "hot topics" in Employment Law.

On Site Training

A PRM Loss Prevention Consultant can develop and present customized onsite training to meet your workforce training needs and regulatory compliance.

Webinars

Webinars are designed to provide members with up-to-date information about pending legislation or proposed changes in employment law, workers' compensation, and trending topics in Risk Management and Safety.

ONLINE TRAINING TOOLS

PRM provides members with four free online training portals to help prevent losses associated with Property & Casualty, Workers' Compensation, Safety, and all areas of Liability.

LocalGov 

Learning Management System

- New Hire Training Bundle
- Course of the Month
- Training Tracking Tool
- Training Certificates
- Report Feature

 **STREAMERY**

- 600+ Video Safety Topics
- One Single Login For Your Entire Organization
- Quizzes
- Supplemental Materials

POLICE 1
ACADEMY

Learning Management System

- Course of the Month Schedule
- Training Tracking Tools
- Report Features

**Safety
SOURCE**

- 700+ Safety Topics
- One Single Login For Your Entire Organization



Board Meetings

PRM Pool Board Members and Board Alternates are invited to attend all scheduled general board meetings in April, June, and November each year.

These meetings are held to provide members with information and updates relevant to insurance coverages, PRM resources, and other activities concerning your membership in the PRM Pool. The meetings also allow members to network with other members and talk with PRM Staff. The board meetings are also when voting takes place for applicable agenda items and the opportunity for your voice to be heard.

Annual Educational Conference

PRM sponsors an Annual Educational Conference for members in June. The multi-day conference includes informational sessions and the opportunity to meet and network with other PRM Members.

Member Surveys

As a PRM member, you have a unique opportunity to share information with other members. Our Loss Prevention Consultants can design and send surveys on various topics to obtain feedback from other members and provide you with the results.

Loss Analysis

Our Loss Analysis report will provide you with an overview of the organization's past claims and accidents by frequency and severity and identify accidents by injury type. Your Loss Prevention Consultant will arrange a meeting with you annually to review the report and make recommendations for training correlated to your losses.



TAB E: REFERENCES

REFERENCES FORM

Provide specific references for at least five (5) customers (preferably public entities), including customers served, with specific types of insurance provided. They should be of similar sizes, complexity and magnitude to the City. Additional references maybe provided by attachment:

Proposer: Accretive Global Insurance Services, LLC dba World Risk Management

Organization: City of Fruitland Park
Address: 506 W Berckman St Fruitland Park, FL 34731
Contact: Gary LaVenia Phone Number: 352-360-6727
Insurance Service Provided: Property, General/Public Officials/Law Enforcement Liability, Automobile, Workers Compensation

Organization: City of Inverness
Address: 212 W. Main Street Inverness, FL 34450
Contact: Susan Jackson Phone Number: 352-726-2611
Insurance Service Provided: Property, General Liability, Public Officials Liability Automobile, Workers Compensation

Organization: Town of Lady Lake
Address: 409 Fennell Blvd Lady Lake, FL 32159
Contact: Tamika DeLee Phone Number: 352-751-1501
Insurance Service Provided: Property, General/Public Officials/Law Enforcement Liability, Automobile, Workers Compensation

Organization: City of Tavares
Address: 201 E. Main Street Tavares, FL 32778
Contact: Crissy Bublitz Phone Number: 352-742-6211
Insurance Service Provided: Property, General Liability, Public Officials Liability Automobile, Workers Compensation

Organization: City of Crystal River
Address: 123 NW Hwy 19 Crystal River, FL 34428
Contact: Michelle Russell Phone Number: 352-795-4216
Insurance Service Provided: Property, General Liability, Public Officials Liability Automobile, Workers Compensation



TAB F: ADDITIONAL INFORMATION

Our team understands the unique demands and risk associated with public agencies such as the City of Chipley. In addition to understanding the standard exposures a municipality faces, we look at the non-standard risks such as, but not limited to, Active Shooter/Workplace Violence situations, Terrorism Threats, and Social Engineering claims, just to name a few of the out of the norm type losses the City could face.

As our corporate structure is decentralized and client-centric we can ensure that the City's needs come first. Our singular focus will be to ensure that the City receives best-in-class service and support. Additionally, due to our structure and size, we can utilize our ability of being a strong, private organization to take advantage of the everchanging insurance market opportunities to meet and exceed the City's expectations. Below are a few of the advantages are firm offers:

WRM's commitment to our carrier partners, second only to the commitment to our clients, has allowed our organization to develop exceptional carrier relationships, some of which are not accessible by even the largest brokerage firms in the state of Florida. We work with only "A rated" insurance carriers to create innovative insurance products that increase availability, improve pricing and provide superior coverage to those industries we service. Our long-term relationships with insurance carriers equate to leverage for our clients; leverage of pricing, availability of coverage, resources, and service.

WRM is the administrator and exclusive broker for the proposed insuring company, Public Risk Management of Florida. PRM is one of the preeminent risk management and insurance associations for government agencies in the state of Florida.

WHAT SETS US APART

- Historical knowledge of unique insurance needs
- Customized and tailored products, services and experience
- Proprietary exclusive programs/carriers for public entity risk
- Dedicated staff – dedicated service team exclusive for the City
- Longevity of service team – average team member has spent fifteen years in municipal insurance
- Over 100+ years of total team Public Entity experience
- Florida Public Entity Risk Management Specialization

In partnership with PRM, we are continuously working on existing client projects and adding new members to the property & casualty program. On an everyday basis we provide property and casualty insurance placements, risk management services, contract reviews, loss control, appraisals, educational seminars, employment practices hotline, in-depth onsite claim services and much more for the membership. The PRM membership makes up a variety of insurance placements and projects that require special attention to ensure stability and consistency. Whether it be first dollar, structured deductibles or self-insured retentions, our team is well qualified and capable of providing specifically tailored insurance programs that align with the City's goals and visions. As part of our commitment to delivering the best products and services, our team is continually analyzing member trends and loss data to make recommendations to current structures that will be most advantageous to our members. **As a result, we have consistently delivered real world, relevant risk control solutions where coverage and loss control prevention has made a direct impact in claim cost reductions and the overall bottom line - resulting in long term program & project consistency.**



TAB F: ADDITIONAL INFORMATION

Utilizing our 100+ years of combined experience, we customize and tailor products and services to each one of our clients. We believe that insurance should not be a “volume business”, but rather that every client deserves their own “best deal”. As such, we will conduct soft marketing efforts outside of the proposed insuring company, PRM, every few years to ensure that the City is receiving the best deal from a coverage, terms and pricing perspective. Our long-term relationships with leading municipal carriers and experience in the public entity arena ensure our delivery of cost savings and program reductions which ultimately result in fewer claims for our insureds and greater financial security.

Additionally, WRM will provide a dedicated service team to the City. Led by Jon Rivera, our team will work closely with City staff to assist the City in understanding their unique exposures and other variables that drive their insurance costs. In conjunction with PRM, we will proactively utilize claim data to develop impactful loss control and claims management strategies thereby reducing the City’s Total Cost of Risk [TCOR].

Control of claims costs has never been more important due to a hardening market and so much uncertainty surrounding the financial impact of COVID-19 on the commercial insurance marketplace. With that in mind, below are a few project examples where our team has provided solutions to our insureds with respect to shoring up gaps in coverages, minimizing out-of-pocket expenses and reducing their claims experience; allowing our insureds to consistently beat the market from a coverage and price perspective.

CITY OF KEY WEST

Key challenges: The City released an RFP with the goal of reducing its insurance costs while improving the terms, conditions and coverage available on important coverage extensions found on the incumbent property form.

Solutions: Our firm placed the City’s coverage with PRM which has one of the broadest property forms available for public entities in the state of Florida. We were able to enhance the available coverage to the City significantly on items such as:

- Named Windstorm Deductible Minimum waived; Flood Limit Increased to \$50 Mil from \$5mil;
- Ordinance or Law (Increased Cost of Construction) increased to \$25 Mil from \$2 Mil;
- Unintentional Errors & Omissions increased to \$25 Mil from \$250,000;
- New Locations limit increased to \$25 Mil from \$2 Mil;

Financial Impact: Typically, when such coverage/term enhancements are secured, one can expect a corresponding rate increase. However, we were able to reduce the City’s property rate by **41%** resulting in approximately **\$316,000 in savings to the City**.

CITY OF SOUTH MIAMI

Key challenges: The City had seen a steady increase in premium costs on a year over year basis from PGIT. To obtain some premium relief, the City established a structured deductible program on various lines of coverage. Due to a reduction in workforce and budget constraints, the City was looking for ways to reduce their premium costs.

Solutions: After evaluating the City’s insurance program and claims experience, it was evident that the City was not well positioned to fund for their deductible losses. Additionally, the lines of coverage where a deductible was established did not include an aggregate and the City’s exposure was not capped.



TAB F: ADDITIONAL INFORMATION

WRM marketed and negotiated the City's program with PRM enhancing the City's coverages significantly:

- Named Windstorm Deductible Minimum waived;
- Enhanced property coverages; Policies reverted back to Guaranteed Cost;
- Additional limits of liability on all liability coverages secured;

Financial Impact: We were able to enhance the City's coverage across the board while **saving them approximately 25% of their renewal premium.**

WRM understands the unique demands and risk associated with cities as dynamic and diverse as the City. In addition to understanding the standard exposures a City faces, we look at the non-standard risks such as, but not limited to, Active Shooter/Workplace Violence situations, Terrorism Threats, and Social Engineering claims, just to name a few of the out of the norm type losses the City could face.

"The level of service provided by the WRM/PRM team is unlike anything I have experienced" is the feedback most often received from new clients. The reason for that is quite simple: Our ultimate goal is to function as an extension of your Risk Management Department to ensure that your purchased insurance programs meet your needs from both a program terms and budgetary perspective. This includes a consultative approach with an enterprise risk management philosophy of strategic, operational and financial risk evaluations, not just hazard insurance and traditional broker commodity placements. This role further extends to attending City meetings such as workshops, Commission meetings, and/or any other meetings as identified by City staff, as needed.

In partnership with PRM, we are continuously working on existing client projects and adding new members to the property & casualty program. On an everyday basis we provide property and casualty insurance placements, risk management services, contract reviews, loss control, appraisals, educational seminars, employment practices hotline, in-depth onsite claim services and much more for the membership. The PRM membership makes up a variety of insurance placements and projects that require special attention to ensure stability and consistency. Whether it be first dollar, structured deductibles or self-insured retentions, our team is well qualified and capable of providing specifically tailored insurance programs that align with the City's goals and visions. As part of our commitment to delivering the best products and services, our team is continually analyzing member trends and loss data to make recommendations to current structures that will be most advantageous to our members. **As a result, we have consistently delivered real world, relevant risk control solutions where coverage and loss control prevention has made a direct impact in claim cost reductions and the overall bottom line - resulting in long term program & project consistency.**

Core Services include:

- Review of City's exposures
- Provide recommendations to enhance the City's risk management and insurance program.
- Provide a marketing strategy outlining the strategy for renewal of the City's insurance coverages.
- Provide information regarding the most advantageous insurance markets from the standpoint of cost, service, coverage and security.
- Assist the City in the preparation of materials, statements of values, specifications and underwriting data required by insurers. This includes working with the City to gather the necessary information.



TAB F: ADDITIONAL INFORMATION

- Day-to-Day account administration including issuance of binders and invoices; verifying the accuracy and adequacy of all binders, policies, endorsements, invoices, claim loss runs and other insurance related documents prior to delivery to the City.
- Negotiate with underwriters for certain coverages and take responsibility for negotiation for other insurance coverages as directed by the City.
- Participate in risk management meetings to review performance against objectives.
- Prepare a working summary of insurance including terms, conditions and endorsements.
- Prepare certificates of insurance and endorsements as requested by the City.
- Provide Claim Advocacy Services.
- Prepare and submit special reports, loss analyses, etc. as requested including allocation of premium and fees between your divisions.
- Review insurance requirements, assumption of liability clauses and other risk management issues for certain contracts, leases and agreements as requested.

Jon is committed to continuing to meet with the City staff and leadership as needed to ensure that any data requests sent to the City are fully understood to best position the City for the upcoming renewal. Additionally, WRM begins the renewal process as early as December ensuring that the City is kept apprised of their upcoming insurance renewal throughout the year, avoiding any potential surprises. Jonathan Rivera will meet with the City quarterly to go over the renewal applications and address any questions/concerns the City may have heading into renewal. Not-to-Exceed budget expectations are provided as early as June with renewal plans provided in-person giving the City an opportunity to seek clarification on any items as well as to address any questions the City may have.

Additionally, Jonathan will work with the City and PRM to coordinate safety reviews of the City's operations in an effort to recommend and provide impactful loss control recommendations.

PRM has three loss control and safety specialists throughout the state ready to assist the City as needed to identify known exposures as well as lesser known exposures.

PRM, with the City's assistance, will conduct a Risk/Safety Review of the City's formal and informal Risk Management practices and procedures. Included in the review, but not limited to:

- Review of external/internal forms, reporting processes and procedures;
- Review of Accident & Injury Investigation processes, procedures and documentation;
- Review of written Safety policies, rules and procedures;
- Assistance in establishing a Safety Committee;
- Safety Inspections with a focus on preventative maintenance and documentation;

Additionally, PRM provides a full suite of services to assist the City with all its risk management needs. While comprehensive, the list below is not all-inclusive. Except for Disaster Recovery Services, these services have been in place for many years. PRM will continue to provide all these services indefinitely:

Claims Advocacy – In addition to the Claims Advocacy provided by the recommended insuring program, PRM; WRM will serve as the claim advocate for the City on all claims reported, or for those lines of coverage where we are the current broker of record. Services will include, but are not limited to:

- Addressing any issues concerning applicable coverage



TAB F: ADDITIONAL INFORMATION

- Reviewing and assisting with coverage issues/rebuttals
- Reviewing and assisting in a response to reservation of rights
- Assisting in expediting the claim handling process

The City-WRM team will work in conjunction with PRM to coordinate and conduct periodic claim reviews and reserve analysis on all open claims to determine appropriateness of claim strategy and course of action retrospectively and prospectively. Additionally, we will assist on any complex claims and litigation cost management matters as needed.

Safety Training – PRM will provide a Loss Prevention Review periodically, or as needed. This service is a review of the City's formal and informal Risk Management practices and procedures. Included in the review, but not limited to:

- Review of external/internal forms, reporting processes and procedures;
- Review of Accident & Injury Investigation processes, procedures and documentation;
- Review of written Safety policies, rules and procedures;
- Assistance in establishing a Safety Committee;
- Safety Inspections with a focus on preventative maintenance and documentation;

Law Enforcement Hotline – PRM provides a Law Enforcement Hotline at no cost to its members. The hotline is available 24 hours a day, 7 days a week. The hotline provides immediate expert advice to minimize the impact of a critical incident on items such as, but not limited to:

- Questionable violation of civil rights
- Use of deadly force
- Use of excessive force
- Wrongful arrest
- High speed chase resulting in injuries or death

Employment Practices Hotline – PRM provides an Employment Practices Hotline at no cost to its members. PRM has developed a consultation program with the firm of Allen, Norton & Blue whereby members can seek timely legal advice regarding specific employment issues within their respective organizations. The program covers matters involving claims or potential claims of illegal discrimination, denial of due process and other matters involving potential violations of employment related laws that apply to Florida Public Employers.

Learning Management System [LMS] – PRM provides access to First Net Learning and Training Network Now at no costs to its members. The City will have access to a full suite of training modules and/or safety videos to be utilized as a training tool for the end user or to be assigned to City staff.

Disaster Recovery Services – PRM will provide Disaster Recovery Services and Emergency Remediation Services through NorthStar Recovery Services. NorthStar Recovery Services is the nation's premier disaster recovery company and largest environmental remediation company in the world. NorthStar Recovery Services partners with two of the largest vendors in their respective fields, United Rentals and Stanley Steemers, allowing them first right of refusal on critical equipment rental during catastrophic events.



TAB F: ADDITIONAL INFORMATION

ASSET TRACKING AND MANAGEMENT

PRM partners with HCA Management to identify and appraise member properties. Included within the costs of each members' premiums are a full detail appraisal that addresses all key components and factions of the members buildings, contents, and property in the open. This information is tracked, managed, and updated by WRM and this data is available to the members at any time.

HCA Asset Management, LLC
Public Risk Management of Florida 2020
Insurance Detail Report

As of date: 9/14/2020

ENTITY: 080	ISO CONSTRUCTION CLASS: NONCOMBUSTIBLE
SITE: 0042 Depot District	FRAMING: STEEL
BUILDING: 001 Depot Canopy/Pavilion	DATE OF CONSTRUCTION: 2020
ADDRESS:	ADDITIONS (YES-YR. OR NO): 0
OCCUPANCY: PAVILION - OPEN	RENOVATIONS (YES-YR OR NO): 0
FIRE PROTECTION AND SAFETY: AUTO FIRE PROTECTION/ALARM SYS. EMERGENCY LIGHTING EXIT LIGHTING MANUAL FIRE ALARM PULL STATIONS SPRINKLER SYSTEM	NUMBER OF STORIES: 1
SPRINKLERED (YES-% OR NO): 100%	GROSS/BASEMENT SF: 13,440 / NO
FOUNDATION: CONCRETE FOOTING CONCRETE SLAB	LATITUDE/LONGITUDE:
EXTERIOR WALLS: BRICK ON MASONRY WELDED STEEL	
ROOFING: METAL - STANDING SEAM	
PARTITION WALLS: NONE	
CEILING: NONE/EXPOSED DECK	
BUILDING SERVICES: ELECTRIC PLUMBING VENTILATION	
FLOORING: BRICK CONCRETE/W SEALER	
BUILDING FEATURES: BUILT-IN CABINETS & SHELVING CANOPY	

BUILDING

REPLACEMENT COST NEW (RC): \$1,460,400

PROC. EQUIP.-INCL IN RCN (Included in RC above): \$0

EXCLUSION AMOUNT: \$43,800

RC MINUS EXCLUSIONS: \$1,416,600

PROPERTY IN THE OPEN: \$0

PERSONAL PROPERTY:

CONTENT VALUE: \$4,500

EDP: \$0

BUILDING NOTES:

STRUCTURE FEATURES INCLUDE: OPEN AIR CANOPY WITH FULL SPRINKLER SYSTEM, (2) RESTROOM AREAS, (2) STORAGE AREAS AND ELECTRICAL FOR EXHIBITS AND BOOTHS. CONTENTS INCLUDE: MISCELLANEOUS SUPPLIES AND SEATING.





TAB F: ADDITIONAL INFORMATION

Primary Contact & Team Lead Resume



JON RIVERA VICE PRESIDENT, RISK CONSULTANT	
Co-Team Leader	The WRM team is co-led by Jonathan Rivera who will be the primary coordinator of all WRM resources to the City of Wildwood. Jon will have the ultimate responsibility to ensure the City receives exceptional services and expertise from the WRM and PRM network. He will work hand-in-hand with Andy Cooper, the other WRM team members and PRM to ensure effective execution of the entire team. Jon will be involved in approximately 30 percent of the total work provided by WRM for the City.
Relevant Experience & Qualifications	Jon has worked in the insurance industry for over 12 years including roles in insurance placement strategy, brokerage, program administration and underwriting. He has 8 years of experience working in the scholastic and public entity arena. He manages a sizeable book of business and is involved in the design and negotiation of PRM's excess placements.
Attributes	- Strong public entity knowledge and marketing background - Strong communication & responsiveness - Strategic partnership development - Strong, effective relationships with insurance markets
Education, Licenses & Designations	- Certified Insurance Counselor [CIC] in progress - Licensed 2-20 Agent - Licensed 2-15 Agent - PRIMA Member – National and State Levels



TAB F: ADDITIONAL INFORMATION

Executive Leadership Resume



MICHELE JONES | PRESIDENT

Executive Leadership

Michele Jones is the Executive Leadership to Jonathan Rivera and will be utilized for her expertise in the public entity arena. She will work hand-in-hand with Jonathan, Andy and the WRM team to ensure effective execution of the entire team and program. Michele will be responsible as necessary for the total work provided by WRM for the City.

Relevant Experience & Qualifications

Michele has worked in the insurance industry for over 28 years including roles in account management, operations management and currently serves as the President of World Risk Management. She has extensive underwriting and claims broker experience which has enabled her to negotiate improved insurance coverages and favorable terms and conditions for her public entity clients throughout her career.

- 1991 to 2006: AVP – Operations, Arthur J. Gallagher
- 2007 to Present: President, World Risk Management

Attributes

- Strong public entity knowledge and marketing background
- Strong underwriting knowledge and background
- Strategic partnership development
- Strong, effective relationships with insurance markets
- Strong leadership and management skills

Education, Licenses & Designations

- Graduate of the University of Central Florida
- Accredited Advisor in Insurance [AAI]
- Chartered Property & Casualty Underwriter [CPCU] in progress
- Licensed 2-20 Agent
- Licensed 4-40 Customer Representative
- PRIMA Member – National and State Levels

TAB F: ADDITIONAL INFORMATION

Executive Leadership Resume



ANDY COOPER, SENIOR VICE PRESIDENT

Executive Leadership

Andy Cooper will serve the City as the Assistant Team Lead and will work directly with Jon to ensure that the City receives exceptional service and expertise from the WRM Network and PRM program. Andy is responsible for administration of the program before, during and after placement. Andy will be responsible for approximately 10 percent of the total work provided by WRM for the City.

Relevant Experience & Qualifications

Andy has worked in the insurance industry for over 35 years including roles in claims management, account management, and program development. He specializes in providing services to public entities and is an exponential resource to the City. He has been instrumental in designing and negotiating insurance coverages as well as assisting with contractual risk management concerns for public entities for the better part of 30 years.

Attributes

- Strong public entity knowledge and marketing background
- Strategic partnership development
- Strong, effective relationships with insurance markets
- Strong leadership and management skills
- Extensive Claims Broker experience

Education, Licenses & Designations

- Graduate of Redbridge College in London, MBE
- Licensed 2-20 Agent
- PRIMA Member – National and State Levels



TAB F: ADDITIONAL INFORMATION

Executive
Leadership Resume



HASIB BANGLORIA EXECUTIVE VICE PRESIDENT	
Executive Leadership	Hasib Bangloria also serves as the Executive Leadership to Jonathan and will be utilized for his expertise in the public entity arena. He will work hand-in-hand with Jon, Andy and the WRM team to ensure effective execution of the entire team and program. Hasib will be responsible as necessary for total work provided by WRM for the City.
Relevant Experience & Qualifications	Hasib has worked in the insurance industry for over 16 years including roles in production, program development and currently serves as the Executive Vice President of World Risk Management. He has extensive knowledge and background on alternative risk markets and program development and has been instrumental in the development and growth of multiple self-insurance risk pools, both in Florida and across the country.
Attributes	▪ Strong public entity knowledge and marketing background ▪ Strong underwriting knowledge and background ▪ Strategic partnership development ▪ Strong, effective relationships with insurance markets ▪ Strong leadership and management skills ▪ Extensive knowledge and background on alternative risk markets and program development
Education, Licenses & Designations	▪ Graduate of DePaul University, B.S. in Finance ▪ National Science Foundation Member and Scholarship Recipient ▪ National Merit Scholar ▪ Minor in Accounting ▪ Licensed 2-20 Agent ▪ AGRIP Member - National ▪ PRIMA Member – National and State Levels ▪ RIMS Member – National and State Levels ▪ Target Markets Member – Program Administrator ▪ 2013 Business Insurance Top 40 under 40 Award Recipient



TAB F: ADDITIONAL INFORMATION

Account Team Resume



DEBBIE YOUNG ACCOUNT MANAGER	
Account Manager	Debbie Young will work hand-in-hand with Jonathan and the entire brokerage team. Her responsibilities include providing technical expertise and handling the daily servicing responsibilities. She will assist in the marketing phase of the renewal cycle working closely with Jonathan and Andy. Debbie will be responsible for approximately 15 percent of the total work provided by WRM for the City.
Relevant Experience & Qualifications	Debbie has worked in the insurance industry for over 39 years in various account management roles. She spent over 10 years of her career at one of the largest brokerage firms in the City managing a sizeable book of business. She has spent the last 12 years working strictly on Public Entity accounts.
Attributes	- Strong public entity knowledge and marketing background - Strong underwriting knowledge and background - Strong leadership and management skills - Strong, effective relationships with insurance markets - Extensive Broker experience
Education, Licenses & Designations	- Hillsborough Community College - Licensed 2-20 Agent - Licensed 2-15 - Accredited Advisor in Insurance – Candidate - Florida Association of Insurance Agents Member - AGRIP Member

TAB F: ADDITIONAL INFORMATION

Account Team Resume



JENNA JENNINGS | CLIENT SERVICE REPRESENTATIVE

Account Manager

Jenna Jennings will work hand-in-hand with Jonathan and the entire brokerage team. Her responsibilities include providing technical expertise and handling the daily servicing responsibilities. She will assist in the marketing phase of the renewal cycle working closely with Jonathan and Andy. Jenna will be responsible for approximately 15 percent of the total work provided by WRM for the City.

Relevant Experience & Qualifications

Jenna holds a vast array of insurance knowledge with over 6 years of experience, including but not limited to, personal lines, commercial lines, and public entities.

Attributes

- Strong public entity knowledge and marketing background
- Strong underwriting knowledge and background
- Strategic partnership development
- Strong, effective relationships with insurance markets
- Strong leadership and management skills
- Extensive knowledge and background on alternative risk markets and program development

Education, Licenses & Designations

- Graduate of Valencia College
- Licensed 4-40 Agent



TAB F: ADDITIONAL INFORMATION

PUBLIC RISK MANAGEMENT OF FLORIDA TEAM



Robbie Chartier
Executive Director



Tia O'Neal
Asst. Executive Director



Michele Faulkner
Sr. Loss Prevention Consultant



Steve Gailbreath
Loss Prevention Consultant



Renee Hudson
Loss Prevention Consultant



Brian Holobicky
Claims Analyst



TAB F: ADDITIONAL INFORMATION

Proposals are expected from insurers with acceptable financial strength. Insurers eligible for Best's rating should list their most current rating. Insurers not eligible for Best's rating should submit their most recent audited financial statement. Where such rating is unavailable, further information regarding the stability and solvency of the company should be provided. In such cases, the City is particularly interested in reinsurance relationships, and requests a listing of reinsurers, including type and amount of coverage provided by each reinsurer, and percent of participation of each reinsurer. Evidence of such reinsurance coverage is also required.

PUBLIC RISK MANAGEMENT OF FLORIDA

2022 REINSURANCE PARTNERS

CARRIER	AM BEST RATING	FINANCIAL SIZE CATEGORY
National Fire & Marine Insurance Co.	A++ (Superior)	XV (\$2 Billion or greater)
Underwriters at Lloyd's of London	A (Excellent)	XV (\$2 Billion or greater)
Landmark American Insurance Co.	A+ (Superior)	XIV (\$1.5 Billion to \$2 Billion)
Everest National Insurance Co.	A (Excellent)	XV (\$2 Billion or greater)
Endurance American Specialty Insurance	A+ (Superior)	XV (\$2 Billion or greater)
Markel Global Reinsurance Co.	A (Excellent)	XIV (\$1.5 Billion to \$2 Billion)
Lexington Insurance Co.	A (Excellent)	XV (\$2 Billion or greater)
Midwest Employers Casualty Co.	A+ (Superior)	XV (\$2 Billion or greater)
Great American Insurance Co.	A+ (Superior)	XV (\$2 Billion or greater)

A. M. BEST FINANCIAL STRENGTH GUIDE

A++ to A+	A to A-	B++ to B+	B to B-	C++ to C+	C to C-
Superior	Excellent	Very Good	Good	Fair	Marginal

(In \$000 of Reported Policyholders' Surplus Plus Conditional Reserve Funds)

FSC I	Up	to	1,000	FSC IX	250,000	to	500,000
FSC II	1,000	to	2,000	FSC X	500,000	to	750,000
FSC III	2,000	to	5,000	FSC XI	750,000	to	1,000,000
FSC IV	5,000	to	10,000	FSC XII	1,000,000	to	1,250,000
FSC V	10,000	to	25,000	FSC XIII	1,250,000	to	1,500,000
FSC VI	25,000	to	50,000	FSC XIV	1,500,000	to	2,000,000
FSC VII	50,000	to	100,000	FSC XV	2,000,000	to	more
FSC VIII	100,000	to	250,000				

Best's Insurance Reports published annually by A.M. Best Company, Inc., presents comprehensive reports on the financial position, history, and transactions of insurance companies operating in the United States and Canada. Companies licensed to do business in the United States are assigned a Best's Rating which attempts to measure the comparative position of the company or association against industry averages.



TAB F: ADDITIONAL INFORMATION

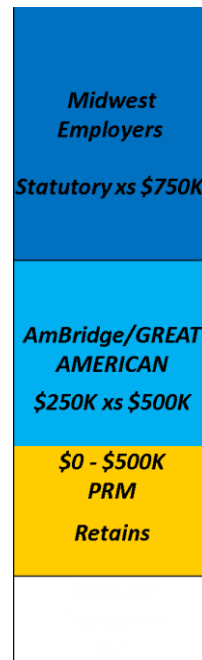
CURRENT PROGRAM STRUCTURE



GL/Auto/LAW



PUBLIC OFFICIALS/EPL



WORKERS' COMPENSATION

FINANCIAL STABILITY OF INSURANCE PROVIDER

The financial position of Public Risk Management of Florida (PRM) public entity insurance pool is categorized as notably stable and secure. Formed in 1987, PRM has consistently provided a quality and constant alternative to the general insurance marketplace. PRM is not a rapid growth pool and has retained a tremendous percentage of long-time clients; currently including 60 members that comprise of counties, cities and special districts in Florida.

PRM has over \$86,000,000 in assets and of that, roughly \$43,000,000 representing a cash-to-asset ratio of 50%. PRM exceeds the industry benchmark of premium-to-surplus ratio of 3:1. PRM is a non-assessable pool.

In addition, PRM approved a member distribution up to \$1,000,000 in 2021 attributable to its solid financial position and positive underwriting results and continues to distribute surplus back to the members strategically each year.

PRM solidifies its financial position by purchasing excess and aggregate reinsurance with low retentions. The reinsurance program is comprised of "A-rated" carriers as rated by AM Best with financial scores of "XI" or better. This structure allows PRM to administer and retain low retentions, after which it cedes the remainder of the loss to the reinsurers. This is of particular importance in the state of Florida, specifically as it relates to property claims. PRM does not retain risk under catastrophic property and cedes all risk for this exposure to A Rated insurance companies. This cannot be claimed by our competitors.

A third party Certified Public Accountant annually audits the pool's results. Member rates are determined utilizing advice from third party actuarial services. A copy of PRM's 2021 Audited Financial Statement can be found on the following pages.



TAB F: ADDITIONAL INFORMATION

**FINANCIAL STATEMENTS
AND
INDEPENDENT AUDITORS' REPORT**

**PUBLIC RISK MANAGEMENT OF
FLORIDA PROPERTY AND CASUALTY**

SEPTEMBER 30, 2021 AND 2020



CONTENTS

INDEPENDENT AUDITORS' REPORT	3
MANAGEMENT DISCUSSION AND ANALYSIS	6
FINANCIAL STATEMENTS	
Statements of Net Position	12
Statements of Revenues, Expenses and Changes in Net Position	13
Statements of Cash Flows	14
NOTES TO FINANCIAL STATEMENTS	16
REQUIRED SUPPLEMENTARY INFORMATON	
Schedule of Proportionate Share of Net Pension Liability	37
Schedule of Contributions	38
Comparative Schedule of Claims Development and Earned Assessments	39



TAB F: ADDITIONAL INFORMATION



Shores, Tagman, Butler & Company, P.A.
CERTIFIED PUBLIC ACCOUNTANTS

INDEPENDENT AUDITORS' REPORT

Board of Directors
Public Risk Management of Florida

We have audited the accompanying financial statements of Public Risk Management of Florida, (the "Company"), which comprise the Statements of Net Position as of September 30, 2021 and 2020 and the related Statements of Revenues, Expenses and Changes in Net Position, and of Cash Flows for the years then ended and the related Notes to Financial Statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the Company's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Company's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

17 South Magnolia Avenue • Orlando, Florida 32801 • TEL (407) 872-0744 • FAX (407) 872-0889



INDEPENDENT AUDITORS' REPORT - CONTINUED

Auditors' Responsibility - Continued

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Public Risk Management of Florida as of September 30, 2021 and 2020 and the results of its operations, its changes in net position and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

Emphasis of Matter

As discussed in the Notes to Financial Statements, the liability for unpaid losses and loss adjustment expenses in the accompanying financial statements is based upon an evaluation by the Company's independent actuary. Management believes that this estimate is reasonable. However, this estimate is subject to change and the changes can be material in relation to the financial statements taken as a whole. No assurance can be given that the actual losses will not be more or less than the current estimate. Our opinion is not modified with respect to this matter.

As discussed in the Notes to Financial Statements, the terms of the service contract require additional fees if the service contract is cancelled or not renewed. No provision was made for these fees as the amount due, if any, cannot presently be determined. Our opinion is not modified with respect to this matter.

Other Matters

Accounting principles generally accepted in the United States of America require that management's discussion and analysis and the required supplemental information, as listed in the table of contents, be presented to supplement the financial statements. Such information, although not a part of the financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the financial



TAB F: ADDITIONAL INFORMATION

INDEPENDENT AUDITORS' REPORT - CONTINUED

Other Matters - Continued

statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the financial statements, and other knowledge we obtained during our audits of the financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Sen, Tagn, Butler: Company, P.A.

May 4, 2022



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

MANAGEMENT'S DISCUSSION AND ANALYSIS

Years Ended September 30, 2021 and 2020

As management of Public Risk Management of Florida (PRM), we offer readers of PRM's financial statements this narrative overview and analysis of the financial activities of PRM for the fiscal years ended September 30, 2021 and 2020 with selected comparative information for the fiscal year ended September 30, 2019.

OVERVIEW OF PUBLIC RISK MANAGEMENT OF FLORIDA

PRM operates a Property Casualty Pool (P&C) insurance program for participating members in Florida. There is a sister program, Public Risk Management Group Health Trust (GHT) that provides health insurance coverage and other employee benefits to participating members in Florida. Each program is governed by a different Board of Directors. The insured members in each program are different; however, many members participate in both insurance programs.

OVERVIEW OF THE FINANCIAL STATEMENTS

This discussion and analysis are intended to serve as an introduction to PRM's basic financial statements. PRM's basic financial statements are comprised of the financial statements, notes to financial statements and required supplementary information. The financial statements are designed to provide readers with a broad overview of PRM's finances, in a manner similar to a private-sector business.

The Statements of Net Position presents information on all of PRM's assets and liabilities, with the difference reported as net position.

The Statements of Revenues, Expenses and Changes in Net Position present information on all of PRM's revenues and expenses. Any excess or deficiency of revenues over expenses is reported as an increase or decrease to net position.

The Statements of Cash Flows presents information on cash flow provided by and used in activities. The activities are classified into one of three categories: operating activities, capital and related financing activities, and investing activities.

The Notes to Financial Statements provide additional information that is essential to a full understanding of the data provided in the financial statements.

In addition to the financial statements and accompanying notes, this report also presents certain required supplementary information concerning claims development and retirement plans.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida
MANAGEMENT'S DISCUSSION AND ANALYSIS

Years Ended September 30, 2021 and 2020

FINANCIAL HIGHLIGHTS

- Total assets increased by \$3.8 million in 2021 when compared to 2020.
- For the year, PRM's total operating income increased slightly above 2020 by approximately \$14,000.
- Investment income decreased from approximately \$562,000 in 2020 compared to \$212,762 in 2021 due primarily to the drop-in interest rates in 2021.

FINANCIAL ANALYSIS

The Statement of Net Position presents the financial position of PRM at the end of the fiscal year. The statement includes all assets and liabilities of PRM. Net position is the difference between total assets and total liabilities and is an indicator of the current fiscal health of PRM. PRM's net position increased approximately \$3.3 million over 2020. The following is a summarized comparison of PRM's assets, liabilities and net position at September 30:

	2021	2020	2019
Assets and Deferred Outflows			
Current assets	\$ 40,511,968	\$ 45,411,772	\$ 31,489,905
Capital assets	59,210	92,839	107,483
Noncurrent assets	10,005,665	5,665	10,005,665
Deferred outflows of resources	193,988	766,967	753,760
Total Assets and Deferrals	50,770,831	46,277,243	42,356,813
Liabilities and Deferred Inflows			
Current liabilities	11,792,955	11,104,884	10,300,545
Long term liabilities	21,234,920	20,596,432	20,433,560
Deferred inflows of resources	29,014	45,582	36,878
Total Liabilities and Deferrals	33,056,889	31,746,898	30,770,983
Net Position			
Invested in capital assets	59,210	92,839	107,483
Unrestricted	17,654,732	14,437,506	11,478,347
Total Net Position	\$ 17,713,942	\$ 14,530,345	\$ 11,585,830

The largest portion of PRM's assets is cash and equivalents and investments. PRM uses these assets to pay claim liabilities, excess insurance fees and service and administrative costs.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

MANAGEMENT'S DISCUSSION AND ANALYSIS

Years Ended September 30, 2021 and 2020

FINANCIAL ANALYSIS - CONTINUED

In 2021 there was a decrease in excess insurance receivable of approximately \$1,383,000 and a decrease in accounts receivable of approximately \$22,000. Excess insurance recoveries receivable decreased primarily due to an allowance made during the current year due to the questions about the collectability of certain claims. Current non-claim liabilities increased approximately \$154,000 primarily as a result of expenses being paid more slowly in the current year and the timing of certain payments. Long term non-claims liabilities decreased by approximately \$651,000 as a result of a decrease in the pension liability.

In 2020 there was an increase in excess insurance receivable of approximately \$1,316,000, and a decrease in accounts receivable of approximately \$24,000. Excess insurance recoveries receivable increased primarily due to delays in collection from excess insurers. Current non-claim liabilities decreased approximately \$362,000 primarily as a result of expenses being paid more quickly in the current year. Long term liabilities increased approximately \$525,000 as a result of increase in cost of claims.

Member contributions fully fund all costs of the pool, inclusive of excess insurance fees, service fees, administrative fees and estimated loss fund to pay claims, and net of participation credits approved by the Board of Directors.

The Statement of Revenues, Expenses and Changes in Net Position presents the operating results of PRM for the fiscal year. The statement includes all revenues and expenses of PRM. The following is a summarized comparison of PRM's revenues and expenses:

	2021	2020	2019
Operating revenues	\$ 37,469,715	\$ 34,649,276	\$ 32,355,576
Operating expenses	33,733,307	31,624,610	31,263,544
Operating income	3,736,408	3,024,666	1,092,032
Non-operating revenues (expenses)	(552,811)	(80,151)	47,522
Change in net position	3,183,597	2,944,515	1,139,554
Beginning net position	14,530,345	11,585,830	10,446,276
Ending net position	\$ 17,713,942	\$ 14,530,345	\$ 11,585,830

Operating revenues increased approximately \$2,820,000 due to an increase in member premiums. Operating expenses increased approximately \$2,108,000 due to an increase in claims expenses and increase in general and administrative expenses. Excess insurance expense decreased 2% as a percentage of member premium. PRM provides PRMGHT certain administrative services and facilities. The amounts reimbursed for these items during the fiscal years ended September 30, 2021 and 2020 were approximately \$241,000 and \$148,000 respectively.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida
MANAGEMENT'S DISCUSSION AND ANALYSIS

Years Ended September 30, 2021 and 2020

FINANCIAL ANALYSIS - CONTINUED

Operating revenues increased by approximately \$2,294,000 and operating expenses increased \$361,000 in 2020 increase in excess insurance expense. Claims expense decreased 3% as a percentage of member premium in as 2020. Excess insurance expense increased 3% as a percentage of member premiums in 2020.

ECONOMIC FACTORS

PRM believes that the 2022 year will see continued fluctuations in workers' compensation rates. The property market is being impacted by catastrophic weather events and will have an impact on increasing rates in 2022. Upward trends in loss development patterns continue to ease over those that PRM has experienced over the past several years. Areas of concern that management is monitoring very closely are the cost of excess insurance, market capacity for property and workers' compensation, self-insured retention levels and aggregate attachment levels that determine loss fund contributions. For 2021, 2020 and 2019, PRM chose not to carry aggregate excess insurance.

Subsequent to September 30, 2020, the COVID-19 virus affected PRM and PRM insureds. Management believes that this will not affect the historical results of PRM but has changed the operations of PRM to a work from home environment.

PRM continues to focus on providing members with training programs of proven loss prevention means and methods that help reduce the number and severity of future claims. Operational enhancements that will improve efficiency, reduce costs and/or increase productivity without sacrificing the quality of member services will be pursued. Administrative expenses and contract service fees should see about the same percentage of premiums as in 2021.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida
MANAGEMENT'S DISCUSSION AND ANALYSIS

Years Ended September 30, 2021 and 2020

SELECT COMBINED FINANCIAL INFORMATION

The following are selected combined financial information for PRM and PRMGHT:

	<u>September 30, 2020</u>	<u>September 30, 2019</u>
Total Assets	\$86,789,503	\$77,746,300
Total Gross Premiums	\$134,448,116	\$124,125,471

REQUEST FOR INFORMATION

This financial report is designed to provide a general overview of PRM's finances for all those with an interest. Questions concerning any of the information in this report or requests for additional information should be addressed to Robbie L. Chartier, Executive Director.



TAB F: ADDITIONAL INFORMATION

**FINANCIAL STATEMENTS &
NOTES TO FINANCIAL STATEMENTS**



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

STATEMENTS OF NET POSITION

	September 30,	
	2021	2020
ASSETS AND DEFERRALS		
CURRENT ASSETS		
Cash and cash equivalents	\$ 25,935,253	\$ 18,092,319
Accounts receivable	518,283	540,583
Excess insurance receivable on paid losses	2,219,250	3,602,600
Prepaid expenses and other assets	6,719,413	8,124,729
Certificates of deposit	5,119,769	15,051,541
Total Current Assets	40,511,968	45,411,772
NONCURRENT ASSETS		
Certificates of deposit	10,000,000	-
Deposits	5,665	5,665
Furniture and equipment, net	59,210	92,839
Total Noncurrent Assets	10,064,875	98,504
TOTAL ASSETS	50,576,843	45,510,276
DEFERRED OUTFLOWS OF RESOURCES	\$ 193,988	\$ 766,967
LIABILITIES, DEFERRALS AND NET POSITION		
CURRENT LIABILITIES		
Accrued liabilities	\$ 201,706	\$ 47,669
Claims payable	11,591,249	11,057,215
Total Current Liabilities	11,792,955	11,104,884
NONCURRENT LIABILITIES		
Claims payable - net of current portion	19,626,822	18,346,773
Compensated absences	78,015	68,866
Pension liability	1,530,083	2,180,793
Total Noncurrent Liabilities	21,234,920	20,596,432
TOTAL LIABILITIES	33,027,875	31,701,316
DEFERRED INFLOWS OF RESOURCES	29,014	45,582
NET POSITION		
Invested in capital assets	59,210	92,839
Unrestricted	17,654,732	14,437,506
TOTAL NET POSITION	\$ 17,713,942	\$ 14,530,345

The accompanying notes are an integral part of these financial statements.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

STATEMENTS OF REVENUES, EXPENSES AND CHANGES IN NET POSITION

	Years Ended September 30,	
	2021	2020
OPERATING REVENUES		
Member premiums	\$ 37,228,803	\$ 34,501,175
Miscellaneous revenues	240,912	148,101
Total Operating Revenues	<u>37,469,715</u>	<u>34,649,276</u>
OPERATING EXPENSES		
Claims expense	13,845,422	12,772,958
Excess insurance premiums	14,950,923	14,560,235
General and administrative	4,936,962	4,291,417
Total Operating Expenses	<u>33,733,307</u>	<u>31,624,610</u>
OPERATING INCOME	3,736,408	3,024,666
NON-OPERATING REVENUES (EXPENSES)		
Investment income	212,762	561,802
Distributions to members	(765,573)	(641,953)
Total Non-Operating Revenues (Expenses)	<u>(552,811)</u>	<u>(80,151)</u>
CHANGE IN NET POSITION	3,183,597	2,944,515
Net Position at Beginning of Year	<u>14,530,345</u>	<u>11,585,830</u>
NET POSITION AT END OF YEAR	<u>\$ 17,713,942</u>	<u>\$ 14,530,345</u>

The accompanying notes are an integral part of these financial statements.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

STATEMENTS OF CASH FLOWS

	Years Ended September 30,	
	2021	2020
CASH FLOWS FROM OPERATING ACTIVITIES		
Cash received from members	\$ 37,251,103	\$ 34,525,246
Cash received from related party	240,912	148,101
Cash paid for claims, net of recoveries	(12,031,339)	(11,368,916)
Cash paid for suppliers for goods and services	(17,762,276)	(22,939,304)
Net Cash Provided by Operating Activities	<u>7,698,400</u>	<u>365,127</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Net proceeds from sale of certificates of deposit	(68,228)	(10,051,541)
Net proceeds from sale of debt securities	-	10,000,000
Interest received on investments	<u>212,762</u>	<u>561,802</u>
Net Cash Provided by Investing Activities	<u>144,534</u>	<u>510,261</u>
Net Increase in Cash and Cash Equivalents	7,842,934	875,388
Cash and Cash Equivalents at Beginning of Year	<u>18,092,319</u>	<u>17,216,931</u>
Cash and Cash Equivalents at End of Year	<u>\$ 25,935,253</u>	<u>\$ 18,092,319</u>

The accompanying notes are an integral part of these financial statements.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

STATEMENT OF CASH FLOWS - CONTINUED

	Years Ended September 30,	
	2021	2020
RECONCILIATION OF OPERATING INCOME TO NET CASH PROVIDED BY OPERATING ACTIVITIES		
Operating income	\$ 3,736,408	\$ 3,024,666
Adjustments to reconcile operating income to net cash provided by (used in) operating activities:		
Depreciation	33,629	14,644
Distributions to members	(765,573)	(641,953)
Changes in assets and liabilities:		
(Increase) Decrease in –		
Accounts receivable	22,300	24,071
Excess insurance receivable on paid losses	1,383,350	(1,315,625)
Prepaid expenses and other assets	1,414,465	(1,703,384)
Deferred outflows of resources	572,979	(13,207)
Increase (Decrease) in –		
Accrued liabilities	154,037	(74,547)
Premiums received in advance	-	-
Claims payable	1,814,083	1,404,042
Pension liability	(650,710)	(362,284)
Deferred inflows of resources	(16,568)	8,704
Total adjustments	3,961,992	(2,659,539)
Net Cash Provided by Operating Activities	\$ 7,698,400	\$ 365,127

Noncash Investing, Capital and Financing Activities

Noncash distributions to members totaled \$765,573 and \$641,953 for the years ended September 30, 2021 and 2020, respectively

The accompanying notes are an integral part of these financial statements.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS

September 30, 2021 and 2020

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

A summary of the Public Risk Management of Florida ("PRM") significant accounting policies consistently applied in preparation of the accompanying financial statements follows. Other significant accounting policies are disclosed elsewhere in the financial statements and the notes thereto.

Reporting Entity

Public Risk Management of Florida is a cooperative agency voluntarily established by contracting political subdivisions to act as a local government risk management pool as defined by Florida Statute 163.01(3)(h). PRM was organized in October 1987 to provide a program of property and casualty coverage for its member organizations, which include cities, counties, authorities, and special districts. The objectives of the program are to formulate, develop and administer a program of risk management and risk financing on behalf of the member political subdivisions; to obtain lower costs for insurance coverage; and to develop a comprehensive loss control program. PRM is a non-assessable pool. There are approximately 60 members of PRM.

PRM conforms all significant accounting policies to generally accepted accounting principles applicable to governmental units. The following is a summary of the more significant principles and practices used in the preparation of these financial statements.

In defining PRM for financial reporting purposes, management applied the requirements of Governmental Accounting Standards Board (GASB) Statement Number 14, *The Financial Reporting Entity*, GASB Statement Number 39, *Determining Whether Certain Organizations are Component Units* and GASB Statement Number 61, *The Financial Reporting Entity: Omnibus, an Amendment of GASB Statements 14 and 34*. These statements establish the basis for defining the reporting entity and whether it is considered a component unit of another entity and whether other entities are component units. Based on these criteria, the reporting entity includes only the accounts of PRM in the reporting entity. PRM identified no potential component units to include in these financial statements nor identified any other entity that should include PRM in its financial statements.

Basis of Accounting

PRM prepares its financial statements on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America for proprietary funds, which are similar to those for private business enterprise, and the prevailing practices within the insurance industry. Accordingly, revenues are recorded when earned and expenses are recorded when incurred.



Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - CONTINUED

Basis of Accounting - Continued

The assets, liabilities and net position of PRM are reported in a self-balancing set of accounts representing funds available for support of PRM.

Operating Revenues and Expenses

PRM defines operating revenues and expenses as all periodic non-investment activities that contribute to the measurement of its risk financing objectives. PRM's operating revenues and expenses are deemed to consist of all non-investment revenues earned and all expenses incurred. All of PRM's revenues and expenses relate to the operating and maintenance of the self insurance fund. There are no non-investment revenues or expenses deemed to be non-operating. Premiums are direct charges for services, while investment earnings serve to add to long term earnings which offset discounts applied in the valuation of the unpaid claims liability. Expenses are entirely operating and represent losses, ceded premiums, acquisition costs, taxes and administration.

Cash and Cash Equivalents

For purposes of the Statements of Cash Flows, demand deposit accounts with commercial banks and cash invested in commercial money market funds are considered cash equivalents. Investments that are held separately from the investment accounts and are highly liquid with an original maturity of ninety days or less when purchased or so near their maturity that they present an insignificant risk of change in value because of changes in interest rates are considered to be cash equivalents.

Excess Insurance Recoverables on Paid Losses

Recoverables from excess insurers on paid losses, if any, are reported as assets in the Statements of Net Position.

Recoverables from excess insurers on unpaid losses, if any are recorded as a reduction to the liability for unpaid losses and loss adjustment expenses in the Statements of Net Position.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - CONTINUED

Unpaid Losses and Loss Adjustment Expenses

PRM establishes claims liabilities based on estimates of the ultimate cost of claims (including future allocated loss adjustment expenses) that have been reported but not settled and of claims that have been incurred but not reported. The length of time for which costs must be estimated varies depending on the coverage involved. Estimated amounts of salvage and subrogation and excess insurance recoverable on unpaid claims are deducted from the liability for unpaid claims. Because actual claims costs depend on such complex factors as inflation, changes in doctrines of legal liability and damage awards, the process used in computing claims liabilities does not necessarily result in an exact amount, particularly for coverage such as general liability. Claims liabilities are recomputed periodically using a variety of actuarial and statistical techniques to produce current estimates that reflect recent settlements, claim frequency and other economic and social factors. A provision for inflation in the calculation of estimated future claims costs is implicit in the calculation because reliance is placed both on historical data that reflects past inflation and on other factors that are considered to be appropriate modifiers of past experience. Adjustments to claims ultimates are charged or credited to expense in the periods in which they are made.

Excess Insurance

PRM uses excess insurance agreements to reduce its exposure to large losses on all types of insured events. Excess insurance permits recovery of a portion of losses from excess insurance carriers, although it does not discharge the primary liability of PRM as the direct insurer of the risk subject to those agreements. PRM does not report risks that invade the excess layers as liabilities unless it is probable that those risks will not be covered by the excess insurer.

Premiums

Premiums are billed in advance and are recognized on a straight-line basis throughout the year. Premiums are allocated to members based upon an analysis of exposure and losses prepared by the service company of PRM and an appraisal of the covered property and exposure for each member organization.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - CONTINUED

Earned Premium

At year end, certain members that purchase workers' compensation from PRM report actual payrolls to the administrator and the other members have a payroll audit. Any additional premiums due are billed at that time. Premiums for workers' compensation coverage as recorded herein are based upon actual payrolls as reported by the members for applicable accounts, and audited payrolls for the members when the audits are complete.

Income Taxes

PRM is exempt from income taxes under provisions of Section 115 of the Internal Revenue Code.

Management Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from those estimates.

Compensated Absences

Accumulated unpaid vacation days, earned ratably over the year, that are allowed to be carried forward to subsequent years are accrued at year end.

Furniture and Equipment

Furniture and equipment of PRM are recorded at cost. Donated property, plant and equipment are capitalized at their fair market value at the time received. Depreciation is provided using the straight-line method over the estimated useful lives of the various classes of depreciable assets. PRM utilizes an estimated useful life for depreciable assets of five (5) years.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - CONTINUED

Reclassifications

Certain prior year amounts may have been reclassified to conform to current period classifications.

NOTE 2 - INVESTMENTS

PRM's investment policy authorizes investments in any type of security allowed by the Florida Statutes regarding the investment of public funds including but not limited to: (i) The Local Government Surplus Funds Trust Fund, the State Investment Pool administered by the State Board of Administration or any intergovernmental investment pool authorized pursuant to the Florida Interlocal Cooperation Act of 1969, (ii) direct obligations of, or obligations the principal and interest of which are unconditionally guaranteed by the United States Government or United States Treasury at the then prevailing market price for such securities, (iii) interest-bearing time deposits or savings accounts in qualified public depositories, (iv) Federal agencies and instrumentalities, (v) securities of, or other interests in, any open-end or closed-end management type investment company or investment trust registered under the Investment Company Act of 1940, provided such investment company or investment trust is limited to United States government obligations and to repurchase agreements fully collateralized by such United States government obligations and provided such investment company or investment trust takes delivery of such collateral either directly or through an authorized custodian, and (vi) Securities and Exchange Commission registered money market funds with the highest credit quality rating from a nationally recognized rating agency.

Included in PRM's cash balances are amounts deposited with the Florida State Board of Administration's Local Government Investment Pool (SBA) as well as amounts deposited with commercial banks in interest bearing demand accounts. The deposits of PRM are fully insured by either federal depository insurance or by the multiple financial institution collateral pool pursuant to the Florida Security for Public Deposits Act of the State of Florida.

The Florida Security for Public Deposits Act (the Act) establishes guidelines for qualification and participation by banks and savings associations, procedures for the administration of the collateral requirements and characteristics of eligible collateral. Under the Act, PRM's deposits in qualified public depositories are considered totally insured. The qualified public depository must pledge at least 50% of the average



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 2 - INVESTMENTS - CONTINUED

daily balances for each month of all public deposits in excess of any applicable deposit insurance. Additional collateral, up to a maximum of 125%, may be required, if deemed necessary under the conditions set forth in the Act. Obligations pledged to secure deposits must be delivered to the State Treasurer or, with the approval of the State Treasurer, to a bank, savings association, or trust company provided a power of attorney is delivered to the State Treasurer.

As prescribed by PRM's investment policy, PRM's investment portfolio at September 30, 2021 and 2020, includes certificates of deposit and investments with the SBA. Investments with the SBA are available by wire, on a same-day basis, and based on the SBA's availability (as an investment option) to all local governmental units. PRM's investments at year end were held by a third-party agent for and in the name of PRM or invested with the SBA.

The types of deposits and investments and their level of risk exposure as of September 30, 2021 and 2020 were typical of these items during the fiscal years then ended.

The investments with the SBA are \$20,955 and \$20,923 as of September 30, 2021 and 2020, respectively. The money market balance with FL SAFE was \$11,495,259 at September 30, 2021 and \$10,989,629 at September 30, 2020.

Interest Rate Risk: As a means of limiting its exposure to fair value losses arising from rising interest rates, investments are generally held in short-term certificates of deposit and cash-bearing checking accounts with a commercial bank qualified as a public depository with the State of Florida. PRM's investment policy requires the investment portfolio to be structured to protect safety of principal, diversification, liquidity, maximum rate of return, and public confidence.

Credit Risk: PRM's greatest investment priority is safety of principal, avoiding capital losses whether they are from security defaults or erosion of market values. Investments may be made as allowed by the Florida Statutes including the SBA, interest-bearing deposits or savings accounts in banks provided such deposits are secured by collateral as prescribed by Florida statute, obligations of the U.S. government and its agencies and other securities in management type investment companies, provided such investments are collateralized by U.S. government obligations.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 2 - INVESTMENTS - CONTINUED

Custodial Credit Risk: Custodial risk is the risk that, in the event of the failure of the counterparty, PRM will not be able to recover the value of its investments or collateral securities that are in the possession of an outside party. All of PRM's investments are either held in the name of PRM or held in trust under PRM's name.

Concentration of Credit Risk: In order to reduce the risk of default, PRM will use every possible effort whereby no single financial institution may hold more than 50% of the investment portfolio at the current time of investment placement, exclusive of banks qualified as public depositories with the State of Florida, U.S. Treasury securities or Federal National Mortgage or Government National Mortgage securities held in safekeeping except on a short term basis.

NOTE 3 - FURNITURE AND EQUIPMENT

The following is a summary of furniture and equipment:

	September 30,	
	2021	2020
Furniture and fixtures	\$ 32,148	\$ 32,148
Office machines and equipment	54,738	54,738
Automobiles	207,628	207,628
	294,514	294,514
Accumulated depreciation	(235,304)	(201,675)
	\$ 59,210	\$ 92,839

Depreciation expense was approximately \$34,000 and \$40,000 for the years ended September 30, 2021 and 2020, respectively.

NOTE 4 - MULTI-EMPLOYER DEFINED BENEFIT RETIREMENT PLAN

Eligible employees may participate in certain retirement plans which are described below.

Plan Description: All full-time PRM employees participate in the Florida Retirement System (FRS), a multiple-employer cost-sharing defined benefit retirement system, administered by the State of Florida (State). The FRS provides retirement and



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 4 - MULTI-EMPLOYER DEFINED BENEFIT RETIREMENT PLAN - CONTINUED

disability benefits, cost of living adjustments and death benefits to plan participants and beneficiaries. The State issues a publicly available financial report that includes financial statements and required supplementary information for FRS. That report may be obtained by writing to Florida Retirement Systems, State of Florida, Division of Retirement, Post Office Box 9000, Tallahassee, Florida 32315-9000, or by calling (877) 377-1737.

Employees enrolled prior to July 1, 2011 are vested after 6 years of service and upon reaching 62, or with completion of 30 years of service. New employees enrolling on or after July 1, 2011 are vested after 8 years of service and upon reaching age 65, or with completion of 33 years of service. Early retirement may be taken anytime; however, there is a 5 percent benefit reduction for each year by which early retirement precedes normal retirement age. Members are also eligible for in-line-of-duty or regular disability benefits if permanently disabled and unable to work. Benefits are computed on the basis of age, average final compensation and service credit. The Executive Director and Assistant Executive Director positions are in the Senior Management Service Class, and the criteria for employees enrolled prior to July 1, 2001 differs from the Regular class. For Senior Management, before July 1, 2001, members were vested after 7 years of service.

The Deferred Retirement Option Program ("DROP") is a program that provides an alternative method for payment of retirement benefits for a specified and limited period for members of FRS, effective July 1, 1998. Under this program, the employee may retire and have their benefits accumulate in the Florida Retirement System Trust Fund, earning interest, while continuing to work for a FRS employer. After the DROP period of up to 60 months, employment in most circumstances must be terminated. At the time of termination, the employee will receive payment of the accumulated DROP benefits, and begin receiving their monthly retirement benefit.

As a participant in FRS, PRM is also a participant in the Retiree Health Insurance Subsidy (HIS) Program, which is a cost-sharing, multiple employer defined benefit plan established and administered in accordance with Section 112.363, Florida Statutes. The benefit is a monthly payment to assist retirees of the state administered retirement systems in paying their health insurance costs. For the fiscal year ended June 30, 2021, eligible retirees and beneficiaries receive a monthly HIS payment equal to the number of years of service credited at retirement multiplied by 5%. The minimum payment is \$40 and the maximum is \$150 per month, pursuant to Section 112.363, Florida Statutes. To be eligible to receive an HIS benefit, a retiree under one of the state administered retirement systems must provide proof of eligible health insurance coverage, which can include Medicare.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 4 - MULTI-EMPLOYER DEFINED BENEFIT RETIREMENT PLAN - CONTINUED

Funding Policy: Various acts of the Florida Legislature determine the funding methods and benefits. These acts provide employers, such as the PRM, requirements to contribute at the current actuarially determined rate of covered payroll. Effective July 1, 2011, all FRS employees, with the exception of the Deferred Retirement Option Program (DROP) participants and reemployed retirees who are initially reemployed under covered employment on or after July 1, 2010, are required to make pretax retirement contributions of 3% of their gross salary to the plan. PRM's required contribution rates for years beginning July 1, 2021, 2020, 2019, were 10.82%, 10.00%, and 8.47%, respectively. Senior management contribution rates for years beginning July 1, 2021, 2020, 2019, were 29.01%, 27.29%, and 25.41%, respectively.

PRM's contributions to the FRS for each of the years ended September 30, 2021, 2020, 2019, were \$141,372, \$148,069, and \$150,119, respectively, which represent the required contributions for each year.

At September 30, 2021, PRM reported a liability of \$343,134 and \$436,949 for its proportionate share of the net pension liability for the FRS Pension Plan (FRS) and HIS Program (HIS), respectively. The net pension liability was measured as of June 30, 2021, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of that date. At June 30, 2021, PRM's proportion of pension liability for FRS and HIS was 0.004542499% and 0.003562129%, respectively.

At September 30, 2020, PRM reported a liability of \$1,763,271 and \$417,522 for its proportionate share of the net pension liability for the FRS Pension Plan (FRS) and HIS Program (HIS), respectively. The net pension liability was measured as of June 30, 2021, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of that date. At June 30, 2020, PRM's proportion of pension liability for FRS and HIS was 0.00004068323% and 0.003419551%, respectively.

For the years ended September 30, 2021 and 2020, PRM recognized pension expense of \$(682,000) and \$148,000 related to the FRS and HIS plan, respectively.



Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 4 - MULTI-EMPLOYER DEFINED BENEFIT RETIREMENT PLAN - CONTINUED

Actuarial Assumptions:

Actuarial assumptions for both defined benefit plans are reviewed annually by the Florida Retirement System Actuarial Assumptions Conference. The FRS Pension Plan has a valuation performed annually. The HIS program has a valuation performed biennially that is updated for GASB reporting in the year a valuation is not performed. The most recent experience study for the FRS Pension Plan was completed in 2021. Because the HIS Program is funded on a pay-as-you-go basis, no experience study has been completed.

The total pension liability for each of the defined benefit plans was determined by an actuarial valuation as of July 1, 2021 using the entry age normal actuarial cost method. Inflation increases for both plans is assumed at 2.4%. Payroll growth for both plans is assumed at 3.25%. The discount rate and the long term expected rate of the return used for FRS Pension Plan investments was 6.8%. The Plan's fiduciary net position was projected to be available to make all projected future benefit payments of current active and inactive employees. Therefore, the discount rate for calculating the total pension liability is equal to the long-term expected rate of return.

Because the HIS program uses a pay-as-you-go funding structure, a municipal bond rate of 2.85% was used to determine the total pension liability for the program. Mortality assumptions for both plans were used on the Generational RP-2000 with Projections Scale BB tables.

The following changes in actuarial assumptions occurred in 2021:

- FRS - The long-term expected rate of return was decreased from 7.2% to 6.8%, and the active member mortality assumption was updated.
- HIS - The municipal rate used to determine total pension liability remained at 3.58%.

The following changes in actuarial assumptions occurred in 2020:

- FRS - The long-term expected rate of return was decreased from 7.2% to 6.8%, and the active member mortality assumption was updated.
- HIS - The municipal rate used to determine total pension liability remained at 3.58%.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 4 - MULTI-EMPLOYER DEFINED BENEFIT RETIREMENT PLAN - CONTINUED

Sensitivity Analysis

The following represents the sensitivity of PRM's proportionate share of the net pension liability to changes in the discount rate. The sensitivity analysis shows the impact of the PRM's proportionate share of the net pension liability if the discount rate was 1.00% higher or 1.00% lower than the current discount rate at June 30, 2021.

FRS Net Pension Liability

1% Decrease	Current Discount Rate	1% Increase
5.8%	6.8%	7.8%
\$1,534,518	\$343,134	\$(652,730)

HIS Net Pension Liability

1% Decrease	Current Discount Rate	1% Increase
2.58%	3.58%	4.58%
\$505,155	\$436,949	\$381,069

Pension Expense and Deferred Outflows/(Inflows) of Resources

In accordance with GASB, changes in the net pension liability are recognized in pension expense in the current measurement period, except as indicated below. For each of the following, a portion is recognized in pension expense in the current measurement period, and the balance is amortized as deferred outflows or deferred inflows of resources using a systematic and rational method over a closed period, as defined below:

- Differences between expected and actual experience with regard to economic and demographic factors amortized over the average expected remaining service life of all employees that are provided with pensions through the pension plan (active and inactive employees).



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 4 - MULTI-EMPLOYER DEFINED BENEFIT RETIREMENT PLAN - CONTINUED

Pension Expense and Deferred Outflows/(Inflows) of Resources - Continued

- Changes of assumption or other inputs amortized over the average expected remaining service life of all employees that are provided with pensions through the pension plan (active and inactive employees).
- Changes in proportion and differences between contributions and proportionate share of contributions-amortized over the average expected remaining service life of all employees that are provided with pensions through the pension plan (active and inactive employees).
- Differences between expected and actual earning on pension plan investments-amortized over five years.

Contributions to the pension plans from PRM are not included in the collective pension expense.

The average expected remaining service life of all employees provided with pensions through the pension plans at June 30, 2021 was approximately 5.5 years for FRS and HIS. The components of collective pension expense reported in the pension allocation schedules for the fiscal year ended June 30, 2021 are presented below for each plan.

Florida Retirement System

	Recognized in Expense Fiscal Year Ending 2021	Deferred Outflows of Resources	Deferred Inflows of Resources
Service cost	\$ 88,786	\$ -	\$ -
Interest on total pension liability	459,712	-	-
Effect of plan changes	23,929	(173,050)	24,508
Effect of assumptions, changes, or inputs	(740,123)	-	-
Member contributions	(25,361)	-	-
Projected investment earnings	(359,968)	-	-
Changes in proportions	(277,665)	-	-
Administrative expenses	729	-	-
Total	\$ (829,961)	\$ (173,050)	\$ 24,508



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida
NOTES TO FINANCIAL STATEMENTS - CONTINUED
September 30, 2021 and 2020

NOTE 4 - MULTI-EMPLOYER DEFINED BENEFIT RETIREMENT PLAN - CONTINUED

Pension Expense and Deferred Outflows/(Inflows) of Resources - Continued

Health Insurance Subsidy

	Recognized in Expense Fiscal Year Ending 2021	Deferred Outflows of Resources	Deferred Inflows of Resources
Service cost	\$ 47,701	\$ -	\$ -
Interest cost	47,376	-	-
Effect of plan changes		(20,938)	4,506
Effect of economic/demographic gains or losses (differences between expected and actual)	14,397	-	-
Effect of assumptions changes or inputs	39,171	-	-
Member contributions	(9)	-	-
Projected investment earnings	(1,558)	-	-
Net difference between projected and actual investment earnings	862	-	-
Administrative expenses	33	-	-
Total	\$ 147,973	\$ (20,938)	\$ 4,506

Deferred outflows of resources related to employer contributions paid subsequent to the measurement date and prior to the PRM's fiscal year end for the FRS Pension Plan and HIS Program, will be recognized as a reduction of the net pension liability in the reporting period ending September 30, 2022. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pension expense will be recognized as follows:

Year Ending September 30,	FRS	HIS
2022	\$ 30,478	\$ 5,767
2023	35,541	1,837
2024	47,078	3,791
2025	60,327	5,032
2026	(374)	3,763
Thereafter	--	748
Total	\$ 173,050	\$ 20,938



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 4 - MULTI-EMPLOYER DEFINED BENEFIT RETIREMENT PLAN - CONTINUED

Pension Expense and Deferred Outflows/(Inflows) of Resources - Continued

The required Schedules of Proportionate Share of Net Pension Liability, Schedule of Contributions and Components of Pension Expense as required supplementary information are presented immediately following the Notes to Financial Statements.

In addition to amounts reflected above, due to the substantial uncertainty in the financial markets subsequent to year end, PRM has included an accrual for an additional \$750,000 in pension liability. This amount is an estimate that PRM has made in addition to the liability as calculated by the FRS and is included in the accompanying financial statements as of September 30, 2021 and for the year then ended. There was no additional accrual as of September 30, 2020.

NOTE 5 - DEFERRED INFLOWS AND OUTFLOWS OF RESOURCES

In addition to assets and liabilities, PRM reports a separate section for deferred outflows of resources and deferred inflows of resources. Deferred inflows of resources represent an acquisition of net assets that is applicable to a future reporting period. Deferred outflows of resources represent consumption of net position that is applicable to a future reporting period.

At September 30, 2021, PRM reported deferred outflows of resources and deferred inflows of resources from the following:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Florida Retirement System Defined Benefit Plan - Employer contributions subsequent to the measurement date and other differences between assumptions and actual experience	\$ 173,050	\$ 24,508
Florida Retirement System Health Insurance Subsidy Plan - contributions subsequent to the measurement date and other differences between assumptions and actual experience	20,938	4,506
	<u>\$ 193,988</u>	<u>\$ 29,014</u>



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 5 - DEFERRED INFLOWS AND OUTFLOWS OF RESOURCES - CONTINUED

At September 30, 2020, PRM reported deferred outflows of resources and deferred inflows of resources from the following:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Florida Retirement System Defined Benefit Plan - Employer contributions subsequent to the measurement date and other differences between assumptions and actual experience	\$ 637,838	\$ 40,493
Florida Retirement System Health Insurance Subsidy Plan - contributions subsequent to the measurement date and other differences between assumptions and actual experience	129,129	5,089
	<u>\$ 766,967</u>	<u>\$ 45,582</u>

NOTE 6 - OPERATING LEASE

PRM leases office space under a non-cancelable operating lease which is set to expire September 30, 2025. Minimum lease payments as of September 30, 2021 are approximately \$120,000 in aggregate or approximately \$30,000 annually for each of the years ended September 30, 2022 through September 30, 2025.

NOTE 7 - EXCESS INSURANCE RECOVERABLES ON PAID AND UNPAID LOSSES

PRM purchased specific excess insurance to protect against large individual losses. This insurance indemnifies PRM when paid losses on an individual occurrence exceed the retention level specified in the appropriate contract. The limits and retentions vary by line of business and by policy year.

There are excess insurance recoverables on paid losses of approximately \$1,537,000 and \$3,602,000 as of September 30, 2021 and 2020, respectively. Included in this balance are receivables from an excess insurer discussed in Note 14. The largest recoverable on paid and unpaid losses from a specific excess carrier is approximately \$1,300,000 as of September 30, 2021 and 2020.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 7 - EXCESS INSURANCE RECOVERABLES ON PAID AND UNPAID LOSSES -
CONTINUED

There are excess insurance recoverables on unpaid losses of approximately \$10,591,000 (undiscounted) and \$10,150,000 (undiscounted) as of September 30, 2021 and 2020, respectively. Although PRM believes that it should collect all amounts calculated as collectable from excess carriers, uncertainties exist due to the age of the receivables. PRM has recognized an allowance of approximately \$500,000 and \$910,000 related to excess insurance recoveries receivable as of September 30, 2021 and 2020, respectively.

The failure of the excess insurers to honor their obligations could result in losses to PRM. PRM evaluates the financial condition of its excess insurers to minimize its exposure to significant losses from excess insurer insolvency. To the extent that excess insurance coverage of PRM is deemed to be excess insurance under applicable Florida Statutes, any recoverables from an insolvent carrier would likely be paid by the applicable state operated guaranty fund.

NOTE 8 - LIABILITY FOR UNPAID LOSSES AND LOSS ADJUSTMENT EXPENSES

The reserves for unpaid losses and loss adjustment expenses are based upon evaluations of PRM's losses as prepared by PRM's independent actuary. These evaluations are significant estimates which are subject to change. The change can be material in relation to the financial statements taken as a whole. These evaluations include an estimated provision for incurred but not reported losses (IBNR) as well as reported losses. The IBNR (undiscounted) provision totals approximately \$18,305,000 and \$19,610,000 as of September 30, 2021 and 2020, respectively.

The reserve for unpaid losses and loss adjustment expenses has been discounted for the time value of money. These reserves have been discounted over the estimated payout period of the losses based upon data provided by the independent actuary and utilizing an interest rate of 2.0% as of September 30, 2021 and 2020, which represents the anticipated investment earnings while the losses are being paid out. The discount totals approximately \$1,284,000 and \$1,186,000 at September 30, 2021 and 2020, respectively. The loss discount increased approximately \$98,000 and \$51,000 during the years ended September 30, 2021 and 2020, respectively.

Any change in the estimate of net ultimate incurred losses and loss adjustment expenses as compared to the prior year will result in an increase (favorable development) or decrease (unfavorable development) in the current year's net income. Increases or decreases of this nature occur as the result of claim settlements during the current year, and as additional information is received regarding individual claims, causing changes from the original estimates of the cost of these claims. Recent loss development trends are also taken into account in evaluating the overall adequacy of unpaid losses and loss adjustment expenses.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 8 - LIABILITY FOR UNPAID LOSSES AND LOSS ADJUSTMENT EXPENSES - CONTINUED

The schedule below presents the changes in claims liabilities for the past two years of PRM.

	September 30,	
	2021	2020
Unpaid losses and loss adjustment expenses at the beginning of the year	\$ 29,403,988	\$ 27,999,946
Incurring losses and losses adjustment expenses:		
Provision for insured events of the current fiscal year	15,538,583	15,012,150
Provision for insured events of prior fiscal years	(1,693,161)	(2,239,192)
Total incurred losses and loss adjustment expenses	13,845,422	12,772,958
Payments:		
Losses and loss adjustment expenses attributable to insured events of the current fiscal year	7,349,983	4,175,473
Losses and loss adjustment expenses attributable to insured events of prior fiscal years	4,681,356	7,193,443
Total payments	12,031,339	11,368,916
Unpaid losses and loss adjustment expenses at the end of the year	\$ 31,218,071	\$ 29,403,988



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

**NOTE 8 - LIABILITY FOR UNPAID LOSSES AND LOSS ADJUSTMENT EXPENSES -
CONTINUED**

As noted in Note 1 and Note 7, PRM has purchased specific excess insurance to protect itself against large losses. The incurred losses of PRM are net of the effects of recoveries recognized under the excess insurance contracts referred to above. During the years ended September 30, 2021 and 2020, PRM experienced an increase of approximately \$3,300,000 and \$9,300,000, respectively, in the anticipated recoveries recognized from these contracts which has been recorded as a decrease to losses and loss adjustments expenses in the respective years.

The unpaid loss and loss adjustment expenses as of September 30, 2021 will be paid over many years due to the types of coverage's written by PRM. The exact timing of payment of these payments is unknown and subject to many variables, however the net amount estimated to be paid during the year subsequent to September 30, 2021 and 2020 were approximately \$11.6 and \$11.1 million, respectively.

NOTE 9 - RELATED PARTY TRANSACTIONS

PRM provides administrative services and shares its facilities with Public Risk Management Group Health Trust. Amounts received from the Public Risk Management Group Health Trust for services provided during the fiscal years ended September 30, 2021 and 2020 were approximately \$241,000 and \$148,000, respectively. All amounts are paid and expensed in the year that they are incurred.

NOTE 10 - DEFERRED COMPENSATION PLAN

PRM offers its employees a deferred compensation plan, created in accordance with Internal Revenue Code Section 457, in which all employees are eligible to participate. Deferred compensation amounts withheld from participating employees' pay are not taxable as current income until withdrawn from the plan.

The requirements of the Internal Revenue Code Section 457 provides that assets or income of the plan shall be used for the exclusive purpose of providing benefits for participants and their beneficiaries or defraying reasonable expenses of administration of the plan. Since the assets of the amended plan are held in custodial and annuity accounts for the exclusive benefit of plan participants, the related assets of the plan are not reflected on PRM's Statements of Net Position.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 11 - BOARD-APPROVED USAGE OF NET POSITION

The Board of Directors approved the usage of net position to provide member distribution.

NOTE 12 - CONTINGENCY - TERMINATION OF SERVICE CONTRACT

In the event of cancellation or non-renewal of PRM's claims service contract, the service company will continue to manage all pending claims and claims occurring prior to the date of termination. The amount of fees will be based upon the service company's prevailing rates on the date of termination. No provision has been made in the financial statements for such service fees as the amount due cannot presently be determined.

NOTE 13 - CONCENTRATIONS

PRM writes select lines of insurance coverage for public entities within the State of Florida only. Approximately 30% of the 60 members represented 50% of member premium for the years ended September 30, 2021 and September 30, 2020.

PRM maintains cash in demand deposit accounts with federally insured banks that are also designated by the State of Florida as qualified public depositories. At times, the balances in these accounts may be in excess of federally insured limits and benefit from the collateral protection afforded by Chapter 280 of the Florida statutes.

PRM's investments are exposed to a variety of uncertainties, including interest rate, market and credit risks. Due to the level of risk associated with certain investments, it is possible that changes in the values of these investments could occur in the near term. Such changes could materially affect the amounts reported in the financial statements of PRM.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida

NOTES TO FINANCIAL STATEMENTS - CONTINUED

September 30, 2021 and 2020

NOTE 14 - UNCERTAINTY

PRM is in dispute with excess insurers regarding coverage for a claim carried at approximately \$1,015,000 and \$976,000 as of September 30, 2021 and 2020, respectively. There is no allowance for uncollectable amounts on this claim as management believes that it will recover these balances

NOTE 15 - SUBSEQUENT EVENTS

Management considered subsequent events through May 4, 2022, the date the financial statements were available to be issued.



TAB F: ADDITIONAL INFORMATION

SUPPLEMENTAL INFORMATION



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida
MULTI-EMPLOYER PENSION PLAN
SCHEDULE OF PROPORTIONATE SHARE OF NET PENSION LIABILITY
Last 8 Fiscal Years (1)

	Proportion of the Net Pension Liability	Proportionate Share of the Net Pension Liability	Covered Employee Payroll	Proportionate Share of the Net Pension Liability as a Percentage of Its Covered- Employee Payroll	Plan Fiduciary Net Position of the Total Pension Liability (2)
FRS Plan					
2021	0.004542499%	\$ 343,134	\$ 1,179,174	29.10%	96.40%
2020	0.004068323%	1,763,271	934,328	188.72%	78.85%
2019	0.003928319%	1,352,858	1,118,337	120.97%	82.61%
2018	0.003352342%	1,009,743	929,889	108.59%	84.26%
2017	0.003395305%	1,004,308	936,369	107.26%	83.89%
2016	0.003706661%	935,921	913,531	102.45%	84.88%
2015	0.283608600%	366,318	698,814	52.42%	92.00%
2014	0.149865300%	91,440	594,160	15.39%	96.09%
HIS Plan					
2021	0.003562129%	\$ 436,949	\$ 1,179,174	37.06%	3.56%
2020	0.003419551%	417,522	934,328	44.69%	3.00%
2019	0.003488166%	390,219	1,118,337	34.89%	2.63%
2018	0.003074835%	325,444	929,889	35.00%	2.15%
2017	0.003097698%	331,220	936,369	35.37%	1.64%
2016	0.002770212%	322,857	913,531	35.34%	0.97%
2015	0.002362437%	220,419	698,814	31.54%	0.50%
2014	0.001896339%	177,312	913,531	19.41%	0.99%

(1) GASB 68 requires information for 10 years. However, only the information currently available is presented.

(2) The Plan's fiduciary net position as a percentage of the total pension liability is published in Note 4 of the FRS Comprehensive Annual Financial Report.

(3) The above amounts exclude the \$800,000 additional pension liability as of September 30, 2019 and \$750,000 additional pension liability as of September 30, 2021.



TAB F: ADDITIONAL INFORMATION

Public Risk Management of Florida
MULTI-EMPLOYER PENSION PLAN
SCHEDULE OF CONTRIBUTIONS
Last 8 Fiscal Years (1)

			Contributions in Relation to the			Contributions as a Percentage of Covered Employee Payroll
	Actuarially Determined Contribution	Actuarially Determined Contributions	Contribution Deficiency (Excess)	Covered Employee Payroll		
<u>FRS Plan</u>						
2021	\$ 173,050	\$ 173,050	\$ -	\$ 1,179,174		14.68%
2020	135,172	135,172	-	934,328		14.47%
2019	121,806	121,806	-	1,118,337		10.89%
2018	95,539	95,539	-	929,889		10.27%
2017	88,388	88,388	-	936,369		9.44%
2016	90,391	90,391	-	913,531		9.89%
2015	69,146	69,146	-	698,814		9.89%
2014	32,827	32,827	-	594,160		5.52%
<u>HIS Plan</u>						
2021	\$ 20,938	\$ 20,938	\$ -	\$ 1,179,174		1.78%
2020	19,705	19,705	-	934,328		2.11%
2019	19,369	19,369	-	1,118,337		1.73%
2018	16,675	16,675	-	929,889		1.79%
2017	16,394	16,394	-	936,369		1.75%
2016	14,199	14,199	-	913,531		1.55%
2015	8,266	8,266	-	698,814		1.18%
2014	6,496	6,496	-	594,160		1.09%

(1) GASB 68 requires information for 10 years. However, only the information currently available is presented.



Tab F: ADDITIONAL INFORMATION

Public Risk Management of Florida										
COMPARATIVE SCHEDULE OF CLAIMS DEVELOPMENT AND EARNED ASSESSMENTS										
For the Period October 1, 2011 through September 30, 2021										
	Year ending September 30,									
	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Premiums and investment revenue:										
Earned	\$ 37,441,565	\$ 32,327,770	\$ 31,332,313	\$ 31,263,133	\$ 28,592,268	\$ 29,098,432	\$ 29,275,928	\$ 27,659,503	\$ 26,279,274	\$ 25,461,693
Ceded	(14,950,923)	(12,444,984)	(11,044,120)	(12,579,127)	(11,263,937)	(13,988,128)	(15,533,429)	(14,786,476)	(12,569,848)	(11,780,336)
Net earned	22,490,642	19,882,786	20,288,193	18,684,006	17,328,331	15,110,304	13,742,499	12,873,027	13,709,426	13,681,357
Unallocated expenses	4,936,962	6,022,516	5,030,663	4,391,019	4,220,304	4,124,138	4,958,168	5,919,158	6,035,631	6,068,453
Estimated incurred losses and expenses, end of policy year (1):										
Incurred	15,619,255	17,690,595	13,922,614	15,463,092	13,834,347	14,200,516	13,123,807	11,953,287	11,952,200	13,409,689
Ceded	(80,672)	(1,471,284)	(113,500)	(882,049)	(1,229,349)	(691,882)	(1,019,568)	(463,287)	(2,200)	(529,689)
Net incurred	15,538,583	16,219,311	13,809,114	14,581,043	12,604,998	13,508,634	12,104,239	11,490,000	11,950,000	12,880,000
Paid (cumulative) as of:										
End of policy year	7,349,983	4,557,261	3,039,085	3,817,822	3,206,526	4,419,491	3,742,890	3,902,179	3,330,036	3,767,580
One year later	-	9,315,315	6,754,393	7,609,111	7,002,528	7,978,342	6,709,406	7,331,341	6,507,798	7,289,419
Two years later	-	-	9,634,297	9,143,476	8,627,818	10,476,002	8,019,114	8,713,864	8,647,091	8,930,179
Three years later	-	-	-	11,023,793	10,054,418	11,525,740	8,753,003	9,584,285	9,612,473	9,848,490
Four years later	-	-	-	-	12,038,711	11,735,981	9,219,067	10,387,665	10,090,478	10,606,760
Five years later	-	-	-	-	-	11,903,718	9,691,387	10,799,220	10,462,332	10,995,341
Six years later	-	-	-	-	-	-	9,880,593	10,873,089	10,500,756	11,230,759
Seven years later	-	-	-	-	-	-	-	10,999,530	10,606,681	11,241,055
Eight years later	-	-	-	-	-	-	-	-	10,711,567	11,271,491
Nine years later	-	-	-	-	-	-	-	-	-	11,277,682
Re-estimated ceded losses		489,622	1,965,458	493,843	17,264,291	5,477,620	2,673,817	4,123,535	4,135,360	2,191,236
Re-estimated net incurred losses (1):										
End of policy year	15,538,583	16,219,311	13,809,114	14,581,043	12,604,998	13,508,634	12,104,239	11,490,000	11,950,000	12,880,000
One year later	-	14,802,843	12,946,988	13,814,586	12,423,530	14,264,989	11,621,027	12,333,066	12,275,000	13,865,000
Two years later	-	-	13,896,241	12,619,603	12,360,671	14,828,643	11,149,148	12,052,867	12,166,011	13,290,000
Three years later	-	-	-	12,406,235	12,645,144	14,403,475	10,747,321	11,936,951	11,613,010	12,643,234
Four years later	-	-	-	-	12,174,634	13,497,176	10,603,560	11,623,439	11,234,731	11,900,068
Five years later	-	-	-	-	-	12,874,371	10,482,683	11,443,761	10,678,793	11,836,972
Six years later	-	-	-	-	-	-	12,555,659	11,357,132	10,651,666	11,382,679
Seven years later	-	-	-	-	-	-	-	9,915,233	10,837,821	11,360,823
Eight years later	-	-	-	-	-	-	-	-	11,397,999	11,341,552
Nine years later	-	-	-	-	-	-	-	-	-	10,828,647
Increase (decrease) in estimated incurred losses and expenses from end of policy year	\$ (1,416,468)	\$ 87,127	\$ (2,174,808)	\$ (430,364)	\$ (634,263)	\$ 451,420	\$ (1,574,767)	\$ (552,001)	\$ (2,051,353)	

(1) These amounts have been discounted



TAB G: ADDITIONAL REQUIRED DOCUMENTS

PROPOSER'S CERTIFICATION

Submit To: City of Wildwood 100 N Main Street Wildwood, FL 34785 352-330-1330		CITY OF WILDWOOD REQUEST FOR QUALIFICATION (RFP) CERTIFICATION AND ADDENDA ACKNOWLEDGMENT											
DUE DATE: May 16, 2023		DUE TIME: 11:00 am											
RFP # 2023 - 10													
TITLE: Property and Casualty Insurance Program													
VENDOR NAME: Accretive Global Insurance Services, LLC dba World Risk Management		PHONE NUMBER: 407-445-2414											
VENDOR MAILING ADDRESS: 20 N. Orange Ave, Suite 500		FAX NUMBER: 407-445-2868											
CITY/STATE/ZIP: Orlando, FL 32801		E-MAIL ADDRESS: jon.rivera@wrmlc.com											
"I, the undersigned, certify that I have reviewed the addenda listed below (list all addenda received to date). I understand that timely commencement will be considered in award of this RFP and that cancellation of award will be considered if commencement time is not met, and that untimely commencement may be cause for termination of contract. I further certify that the services will meet or exceed the RFP requirements. I, the undersigned, declare that I have carefully examined the RFP, specifications, terms and conditions as applicable for this Request, and that I am thoroughly familiar with all provisions and the quality and type of coverage and services specified. I further declare that I have not divulged, discussed, or compared this RFP with any other Offeror and have not colluded with any Offerors or parties to an RFP whatsoever for any fraudulent purpose." <table border="0"><tr><td>1</td><td>2</td><td></td><td></td><td></td></tr><tr><td>Addendum #</td><td>Addendum #</td><td>Addendum #</td><td>Addendum #</td><td>Addendum #</td></tr></table>				1	2				Addendum #	Addendum #	Addendum #	Addendum #	Addendum #
1	2												
Addendum #	Addendum #	Addendum #	Addendum #	Addendum #									
"I certify that this quote is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting an RFP for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this response and that the offer is in compliance with all requirements of the RFP, including but not limited to certification requirements. In conducting offers with an agency for "CITY", respondent agrees that if this RFP is accepted, the respondent will convey, sell, assign, or transfer to the City of Wildwood all rights, title and interest in and to all causes of action it may now or hereafter acquire under the anti-trust laws of the United States for price fixing relating to the particular commodities or services purchased or acquired by the CITY. At the City of Wildwood discretion, such assignment shall be made and become effective at the time the purchasing agency renders final payment to the respondent." <table border="0"><tr><td>Jonathan Rivera, VP Risk Management Consultant</td><td></td><td>05/15/2023</td></tr><tr><td>Authorized Agent Name, Title (Print)</td><td>Authorized Signature</td><td>Date</td></tr></table>				Jonathan Rivera, VP Risk Management Consultant		05/15/2023	Authorized Agent Name, Title (Print)	Authorized Signature	Date				
Jonathan Rivera, VP Risk Management Consultant		05/15/2023											
Authorized Agent Name, Title (Print)	Authorized Signature	Date											
<i>This form must be completed and returned with your Submittal</i>													



TAB G: ADDITIONAL REQUIRED DOCUMENTS

PROPOSALS FORM FOR CITY OF WILDWOOD



Name of Firm Submitting Proposals Accretive Global Insurance Services, LLC dba World Risk Management

Name of Person Submitting Proposals Jonathan Rivera

PROPOSER ACKNOWLEDGMENT

"The undersigned hereby declares that he/she has informed himself/herself fully in regard to all conditions to the work to be done, and that he/she has examined the RFP and Specifications for the work and comments hereto attached. The Vendor proposes and agrees, if this submission is accepted, to contract with the City of Wildwood to furnish all necessary materials, equipment, labor and services necessary to complete the work covered by the RFP and Contract Documents for this Project. The Vendor agrees to accept in full compensation for each item the prices named in the schedules incorporated herein."


Signature

05/15/2023
Date

RFP # 2023-10
RFP Number

[☐] Check if exception(s) or deviation(s) to Specifications. Attach separate sheet(s) detailing reason and type for the exception or deviation.

This document must be completed and returned with your Submittal



TAB G: ADDITIONAL REQUIRED DOCUMENTS

Statement of Terms and Conditions

PUBLIC ENTITY CRIME: A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Proposal/Bid on a contract to provide any goods or services to a public entity, for the construction or repair of a public building or public work, may not submit a Proposal/Bid on a lease of real property to a public entity, may not be awarded or perform work as a consultant, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.01(2), for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

DISQUALIFICATION: The consultant shall indemnify and hold harmless the City of Wildwood and their elected officials, employees, agents, representatives, and volunteers from and against any and all claims, damages, losses and expenses, (including legal costs), or liabilities based on third party claims of injury to persons or damage to property arising out of or resulting, in whole or in part, from a negligent act or omission or willful misconduct of consultants or its employees, subcontractors, agents or representatives.

PROHIBITION OF LOBBYING: During the blackout period which is the period between the time the submittals for invitation to bid or the Request for Proposal, or Proposal, or Information, as applicable, are received at Contracts / Purchasing and the time the City awards the contract, no proposer, no lobbyist, principal, or other person may lobby, on behalf of a competing party in a particular procurement matter, any member of the City, or any City employee other than Cassandra Smith in writing via email to csmith@wildwood-fl.gov. Violation of this provision may result in disqualification of violating party. All questions regarding this Request for Proposal (RFP) or Invitation to Bid (ITB) must be submitted in writing to the City's Financial Services Manager.

ANTI TRUST LAWS: By submission of a signed RFP or BID, the successful Vendor acknowledges compliance with all antitrust laws of the United States and the State of Florida, in order to protect the public from restraint of trade, which illegally increases prices.

CONFLICT OF INTERESTS: The award of the contract hereunder is subject to the provisions of Chapter 112 of the Florida Statutes. Vendors shall disclose the name of any Officer, Director, Partner, Associate, or Agent who is also an Officer, Appointee, or Employee of any of the City's at the time of the RFP or BID, or at the time of occurrence of the Conflict of Interest thereafter.

INTERPRETATION, CLARIFICATIONS AND AMENDS: No oral interpretations will be made to any vendor as to the meaning of the RFP/BID Contract Documents. Any inquiry or request for interpretation received by Cassandra Smith in writing via email to csmith@wildwood-fl.gov before the date listed herein will be given consideration. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, will be distributed at or after the Pre-Proposal/Bid Conference, mailed or sent by available or electronic means to all attending prospective Submitters prior to the established RFP/BID opening time. Each Vendor shall acknowledge receipt of such addenda in Submitters prior to the established RFP/BID opening time. Each Vendor shall acknowledge receipt of such addenda in the space provided. In case any Proposer/Bidder fails to acknowledge receipt of such addenda or addendum, his offer will nevertheless be construed as though it had been received and acknowledged and the submission of his bid will constitute acknowledgment of the receipt of same. All addenda are a part of the RFP/BID FORMS and each Proposer/Bidder will be bound by such addenda, whether or not received by him. It is the responsibility of each Proposer/Bidder to verify that he has received all addenda issued before RFP/BID's are opened. In the case of unit price items, the quantities of work to be done and materials to be furnished under this RFP/BID Contract are to be considered as approximate only and are to be used solely for the comparison of RFP/BID's received. The City and/or its CONSULTANT do not expressly or by implication represent that the actual quantities involved will correspond exactly therewith, nor shall the Vendor be held responsible for any discrepancy or deviation because of such estimate or quantities of work performed, or material furnished in accordance with the Specifications and/or Drawings and other Proposal/Bid Documents, and it is understood that the quantities may be increased or diminished as provided herein without in any way invalidating any of the unit or lump sum prices bid.

GOVERNING LAWS AND REGULATIONS: The vendor is required to be familiar with and shall be responsible for complying with all federal, state and local laws, ordinances, rules and regulations that in any manner affect the work.

PROPRIETARY/CONFIDENTIAL INFORMATION: Vendors are hereby notified that all information submitted as part of, or in support of RFP/BID's, will be available for public inspection ten days after opening of the RFP/BID's or until a short list is recommended whichever comes first, in compliance with Chapter 119, and 287 of the Florida Statutes. All RFP/BID's submitted in response to this solicitation become the property of the City. Unless information submitted is proprietary, only written, handwritten, or patterned, the City reserves the right to utilize any or all information, ideas, concepts, or portions of any RFP/BID, in its best interest.

TAXES: The City of Wildwood is exempt from any sales imposed by the State and/or Federal Government. Receipts and certificates will be provided upon request.

NON-COLLUSION DECLARATION: By signing this RFP/BID, all Vendors shall affirm that they shall not collude, conspire, connive or agree, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the work for which this RFP/BID has been submitted; or to refrain from bidding in connection with such work or here in any manner, directly or indirectly, sought by person to fix the price or prices in the RFP/BID or of any other bidder, or to fix any overhead, profit, or cost elements of the RFP/BID price or the RFP/BID price of any other bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against any other bidder, or any person interested in the proposed work.

PROPOSER RESPONSIBILITY: Initiation by the City to a Vendor is based on the recipient's specific request or as the result of response by the public to the legal advertisement required by State law. Firms or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.

CITYSHIP OF SUBMITTALS: All responses, inquiries or correspondence relating to or in reference to this RFP/BID, and all other reports, charts, displays, schedules, exhibits and other documentation submitted by the vendors will become the property of the City. Reference to literature submitted with a previous RFP/BID will not relieve the Bidder from including any required documents with this RFP/BID.

DAVENATION OF BID DOCUMENTS: Each bidder shall carefully examine the RFP/BID Document to ensure all pages have been received, all drawings and/or Specifications and other applicable documents are included, and shall inform himself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the CONSULTANT will in no way relieve him of the obligations and responsibilities assumed under the Contract.

VENDOR RESPONSIBILITY: Vendors are fully and completely responsible for the labeling, identification and delivery of their submittals. The City of Wildwood will not be responsible for any mislabeled or misdirected submissions, nor those handled by delivery persons, couriers, or the US Postal Service.

DRUG FREE WORKPLACE: All Proposer/Bidders shall submit the enclosed, duly signed and notarized form entitled "Drug Free Workplace Certificate". The Drug Free Workplace Vendor shall have the burden of demonstrating that his program complies with Section 287.087 of the Florida Statutes, and any other applicable state law.

THE CITY OF WILDWOOD, is a political subdivision of the State of Florida, and reserves the right to cancel this RFP and to reject any and/or all submittals, reserve the right to waive any and all irregularities or irregularities, to re-advertise with either the identical or revised specifications, and reserve the right to award contracts and/or in the best interest of the City. Submittals not meeting stated minimum terms and Proposals may be rejected by the City as non-responsive. The City reserves the right to reject any or all submittals without cause. The City reserves the right to reject the submission of any Vendor in arrears or in default upon any debt or contract to the City, or who has failed to perform faithfully any previous contract with the City's or with other governmental agencies.

PUBLIC RECORDS LAW: Correspondence, materials and documents received pursuant to this RFP/BID become public records subject to the provisions of Chapter 119, Florida Statutes.

VERIFICATION OF TIME: Verifier time is hereby established as the Official Time of the City's.

PREPARATION OF PROPOSALS/BIDS

Signature of the Bidder: The Bidder must sign the RFP/BID FORMS in the space provided for the signature. If the Proposer/Bidder is an individual, the words "doing business as" must appear beneath such signature. In the case of a partnership, the signature of at least one of the partners must follow the firm name and the words, "Member of the Firm" must be written beneath such signature. If the Proposer/Bidder is a corporation, the title of the officer signing the RFP/BID or on behalf of the corporation must be stated and evidence of his authority to sign the RFP/BID must be submitted. The Proposer/Bidder shall state in the RFP/BID FORMS the name and address of each person interested therein.

Items for Bidding: The price proposed for each item shall be on a lump sum or unit price basis according to specifications on the RFP/BID FORMS. The proposed prices shall remain unchanged for the duration of the Contract and no claims for cost escalation during the progress of the work will be considered, unless otherwise provided herein.

Total Proposed Price/Total Contract Sum Proposed: If applicable, the total price bid for the work shall be the aggregate of the lump sum prices proposed and/or unit prices multiplied by the appropriate estimated quantities for the individual items and shall be stated in figures in the appropriate place on the RFP/BID FORMS. In the event that there is a discrepancy on the RFP/BID FORMS due to unit price extensions or additions, the corrected extensions and additions shall be used to determine the project bid amount.

TABULATION: Those wishing to receive an official tabulation of the results of the opening of this RFP/BID are to submit a self-addressed, stamped business size (10" x 10") envelope, prominently marked on the front lower left side, with the RFP/BID number. Tabulation requested by telephone, fax or electronic media will not be accepted.

OBLIGATION OF WINNING BIDDER: The contents of the RFP/BID of the successful Proposer/Bidder will become contractual obligations if acquisition action arises. Failure of the successful Proposer/Bidder to accept these obligations in a contract may result in cancellation of the award and such vendor may be removed from future participation.

AWARD OF BID: It is the City's intent to select a vendor within sixty (60) calendar days of the deadline for receipt of Proposals/Bids. However, Proposals/Bids must be firm and valid for award for at least ninety (90) calendar days after the deadline for receipt of the RFP/BID.

ADDITIONAL REQUIREMENTS: The firms shall furnish such additional information as the City may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The City reserves the right to make investigations of the Proposals of the firm as it deems appropriate.

PROPOSATION COSTS: The City shall not be obligated or be liable for any costs incurred by Proposer/Bidders prior to issuance of a contract. All costs to prepare and submit a response to this RFP/BID shall be borne by the Proposer/Bidder.

TIMELINESS: All work will commence upon authorization from the City's representative. All work will proceed in a timely manner without delays. The Consultant shall commence the work UPON RECEIPT OF NOTICE TO PROCEED and/or ORDER PLACED (PURCHASE ORDER PRESENTED), and shall deliver in accordance to the terms and conditions defined and agreed upon herein.

DELIVERY: All prices shall be FOB Destination, Sunter County, Florida, inside delivery unless otherwise specified.

ADDITIONAL SERVICES/PURCHASES BY OTHER PUBLIC AGENCIES ("PIGGY-BACK")

The Vendor by submitting a bid acknowledges that other Public Agencies may seek to "Piggy-Back" under the same terms and conditions, during the effective period of any resulting contract - services and/or purchases being offered in this bid, for the same price and/or terms proposed. Vendor has the option to agree or disagree to allow contract Piggy-Back on a case-by-case basis. Before a Public Agency is allowed to Piggy-Back any contract, the Agency must first obtain the vendor's approval - without the vendor's approval, the seeking Agency cannot Piggy-Back.

PLANS, FORMS & SPECIFICATIONS: Bid Packages are available from the "CITY". These packages are available for pickup or by mail. If requested by mail, the Proposer/Bidder must supply a return address number (ZIP, FedEx, etc.). Proposer/Bidders are required to use the official RFP/BID FORMS, and all attachments (listed herein, are to be submitted as a single document. Any variation from the minimum specifications must be clearly stated on the RFP/BID FORM and/or Exceptions/Deviations Sheet(s). Only one set of plans, forms, and specifications will be furnished each company or corporation interested in submitting a Proposal/Bid. RFP/BID FORM documents for this project are free of charge and are available on-line and are downloadable.

MANUFACTURER'S NAME AND APPROVED EQUIVALENTS: Any manufacturer's names, trade names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition unless otherwise indicated. The Proposer/Bidder may offer any brand for which he is an authorized representative, which meets or exceeds the RFP/BID specification for any item(s). If RFP/BID's are based on equivalent products, indicate on the RFP/BID FORM the manufacturer's product name and literature, and/or complete specifications. Reference to literature submitted with a previous RFP/BID will not satisfy this provision. The Proposer/Bidder shall explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered as an exception thereto. RFP/BID's which do not comply with these requirements are subject to rejection. RFP/BID's lacking any written indication of intent to quote an alternate brand will be rejected and considered in complete compliance with the specifications as listed on the RFP/BID FORM. The "CITY" is to be notified, in writing, of any proposed changes in materials used, manufacturing process, or construction. However, changes shall not be binding upon the "CITY" unless verified by a Change Notice issued and signed by the "CITY", or designated representative.

QUANTITIES: The quantities as specified in the RFP/BID are estimates only and are not to be construed as guaranteed minimums.

SAMPLES: Samples of items, when called for, shall be furnished free of expense, and if not destroyed may, upon request, be returned at the Proposer/Bidder's expense. Each sample shall be labeled with the Proposer/Bidder's name, manufacturer brand name and number, RFP/BID number and item reference. Samples of successful Proposer/Bidder's items may remain on file for the term of the contract. Request for return of samples shall be accompanied by instructions which include shipping authorization and must be received in time of opening. Samples not returned may be disposed of by the "CITY" within a reasonable time as deemed appropriate.

DOCUMENT RE-CREATION: Vendor may choose to re-create any document(s) required for this solicitation, but must do so at his own risk. All required information in the original "CITY" format must be included in any re-created document. Submittals may be deemed non-responsive if required information is not included in any re-created document.

AGENCY LOGO:


(Signature and Date)

05/15/2023

This document must be completed and returned with your Submittal



TAB G: ADDITIONAL REQUIRED DOCUMENTS

HOLD HARMLESS AGREEMENT

The Consultant agrees to hold the City of Wildwood harmless against all claims for bodily injury, sickness, disease, death or personal injury or damage to property or loss of use of property arising out of or resulting, in whole or in part, from a negligent act or omission or willful misconduct of consultant or its employees, Subcontractors, agents or representatives.

The Consultant shall purchase and maintain workers' compensation insurance for all workers' compensation insurance and employers' liability in accordance with Florida Statute Chapter 440.

The Consultant shall also purchase any other coverage required by law for the benefit of employees.

Required insurance shall be documented in Certificates of Insurance and shall be provided to the City representative requesting the service.

By signature upon this form the Consultant stipulates that he/she agrees to the Hold Harmless Agreement, and to abide by all insurance requirements.

Jonathan Rivera

Consultant-Print Name

Signature

RFP # 2023-10

Project Name

05/15/2023

Date

The effective date of this Hold Harmless Agreement shall be for the duration of this project.

This document must be completed and returned with your Submittal



TAB G: ADDITIONAL REQUIRED DOCUMENTS

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that,

Accretive Global Insurance Services, LLC dba World Risk Management

(print or type name of firm)

- Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
- Informs employees about the dangers of drug abuse in the work place, the firm's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
- Gives each employee engaged in providing commodities or contractual services that are under RFP or bid, a copy of the statement specified above.
- Notifies the employees that as a condition of working on the commodities or contractual services that are under RFP or bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, please or guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
- Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.
- "As a person authorized to sign this statement, I certify that the above named business, firm or corporation complies fully with the requirements set forth herein".



Authorized Signature

05/15/2023

Date Signed

State of: Florida

County of: Orange

Sworn to and subscribed before me this 15th day of May, 2023

Personally known X or Produced Identification _____
(Specify Type of Identification)



Signature of Notary

My Commission Expires 5/12/2026

(seal)



~~This document must be completed and returned with your Submittal~~



TAB G: ADDITIONAL REQUIRED DOCUMENTS

**SWORN STATEMENT TO SECTION 287.133(3)(a),
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES FORM**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL
AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to City of Wildwood
By Jonathan Rivera, VP Risk Management Consultant
(print individual's name and title)

for Accretive Global Insurance Services, LLC dba World Risk Management
(print name of entity submitting sworn statement)

whose business address is 20 N. Orange Ave, Suite 500, Orlando, FL 32801

and (if applicable) its Federal Employer Identification Number (FEIN) is 85-3689655 (If the entity
has no FEIN, include the Social Security Number of the individual signing this sworn
statement: _____.)
2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), **Florida Statutes**, means a
violation of any state or federal law by a person with respect to and directly related to the transaction of
business with any public entity or with an agency or political subdivision of any other state or of the United
States, including, but not limited to, any bid or contract for goods or services to be provided to any public
entity or an agency or political subdivision of any other state or of the United States and involving antitrust,
fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), **Florida Statutes**, means
a finding of guilt or a conviction of a public entity crime, with or without adjudication of guilt, in any federal
or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as
a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), **Florida Statutes**, means:
 - a. A predecessor or successor of a person convicted of a public entity crime; or
 - b. An entity under the control of any natural person who is active in the management of the entity and
who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors,
executives, partners, shareholders, employees, members, and agents who are active in the
management of an affiliate. The ownership by one person of shares constituting a controlling interest
in another person, or a pooling of equipment or income among persons when not for fair market value
under an arm's length agreement, shall be a prima facie case that one person controls another person.
A person who knowingly enters into a joint venture with a person who has been convicted of a public
entity crime in Florida during the preceding 36 months shall be considered an affiliate.
 - c. I understand that a "person" as defined in Paragraph 287.133(1)(e), **Florida Statutes**, means any natural
person or entity organized under the laws of any state or of the United States with the legal power to
enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or
services let by a public entity, or which otherwise transacts or applies to transact business with a public
entity. The term "person" includes those officers, directors, executives, partners, shareholders,



TAB G: ADDITIONAL REQUIRED DOCUMENTS

employees, members, and agents who are active in management of an entity.

- d. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. **{indicate which statement applies.}**

 X Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

 X The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

 X The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. **{attach a copy of the final order}**

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.


{signature}

05/15/2023

{date}

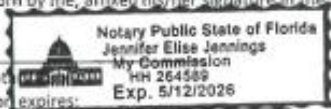
State of Florida

County of Orange

PERSONALLY APPEARED BEFORE ME, the undersigned authority, Jonathan Rivera, who after first being sworn by me, affixed his/her signature in the space provided above on this 15th day of May, 2023.

Attest:

Notary Public
My commission expires:



(Notary Seal)

This document must be completed and returned with your Submittal



TAB G: ADDITIONAL REQUIRED DOCUMENTS

Conflict of Interest Disclosure Form

I HEREBY CERTIFY that

2. I (printed name) Jonathan Rivera am the
(title) VP Risk Management Consultant and the duly authorized representative of the firm of (Firm Name)
Accretive Global Insurance Services, LLC dba World Risk Management whose address is
20 N. Orange Ave, Suite 500, Orlando, FL 32801
and that I possess the legal authority to make this affidavit on behalf of myself and the firm
for which I am acting; and,

2. Except as listed below, no employee, officer, or agent of the firm have any conflicts of interest, real or apparent, due
to ownership, other clients, contracts, or interests associated with this project; and,

3. This bid Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or
person submitting a bid Proposal for the same services, and is in all respects fair and without collusion or fraud.

EXCEPTIONS (List)

Signature: [Signature]

Printed Name: Jonathan Rivera

Firm Name: Accretive Global Insurance Services, LLC dba World Risk Management

Date: 05/15/2023

State of Florida

County of Orange

Sworn to and subscribed before me this 15th day of May 2023

Personally Known X
OR Produced Identification _____, Type of Identification _____

My Commission Expires 5/12/2026



(Printed, typed or stamped commissioned name of notary)

THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR PROPOSALS PACKAGE



TAB G: ADDITIONAL REQUIRED DOCUMENTS

Immigration Affidavit Certification

This Affidavit is required and should be signed, notarized by an authorized principal of the firm, and submitted with formal Invitations to Bid (ITB's) and Request for Proposals (RFP) submittals. Further, Consultants / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment, at the time of the submission of the Consultant's/bidder's proposal. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company. Failure to include this Affidavit and acceptable evidence of enrollment in the E-Verify program may deem the Consultant / Bidder's proposal as nonresponsive.

The City of Wildwood will not intentionally award City contracts to any Consultant who knowingly employs unauthorized alien workers, constituting a violation of the employment provision contained in 8 U.S.C. Section 1324 a(e) Section 274A(e) of the Immigration and Nationality Act ("INA").

The City of Wildwood may consider the employment by any Consultant of unauthorized aliens a violation of Section 274A (e) of the INA. Such Violation by the recipient of the Employment Provisions contained in Section 274A (e) of the INA shall be grounds for unilateral termination of the contract by the City of Wildwood.

Consultant attests that they are fully compliant with all applicable immigration laws (specifically to the 1986 Immigration Act and subsequent Amendment(s)) and agrees to comply with the provisions of the Memorandum of Understanding with E-Verify and to provide proof of enrollment in The Employment Eligibility Verification System (E-Verify), operated by the Department of Homeland Security in partnership with the Social Security Administration at the time of submission of the Consultant's / Bidder's proposal.

Company Name: Accretive Global Insurance Services, LLC dba World Risk Management

Print Name: Jonathan Rivera Title: VP Risk Management Consultant

Signature: [Signature] Date: 05/15/2023

State of Florida County of Orange

The foregoing instrument was signed and acknowledged before me this 15th day of May, 2023, by Jonathan Rivera who has produced DL #R160435890230 as identification.
(Print or Type Name) (Type of Identification and Number)

[Signature]
Notary Public Signature

Jennifer Elise Jennings
Printed Name of Notary Public

414264589 5/12/2026
Notary Commission Number/Expiration



The signee of this affidavit guarantees, as evidenced by the affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.



TAB G: ADDITIONAL REQUIRED DOCUMENTS



Company ID Number: 2149609



Approved by:

Employer Accretive Global Insurance Services, LLC	
Name (Please Type or Print) Jonathan Rivera	Title
Signature Electronically Signed	Date 05/15/2023
Department of Homeland Security – Verification Division	
Name (Please Type or Print) USCIS Verification Division	Title
Signature Electronically Signed	Date 05/15/2023



TAB G: ADDITIONAL REQUIRED DOCUMENTS



Company ID Number: 2149609

Information Required for the E-Verify Program	
Information relating to your Company:	
Company Name	Accretive Global Insurance Services, LLC
Company Facility Address	20 N. Orange Ave Suite 500 Orlando, FL 32801
Company Alternate Address	
County or Parish	ORANGE
Employer Identification Number	853689655
North American Industry Classification Systems Code	524
Parent Company	
Number of Employees	20 to 99
Number of Sites Verified for	1 site(s)



TAB G: ADDITIONAL REQUIRED DOCUMENTS

QUALIFICATIONS SUMMARY
CITY OF WILDWOOD
REQUEST FOR PROPOSALS
WORKERS' COMPENSATION, PROPERTY AND CASUALTY INSURANCE
RFP NO. 2023-10

1. Agent/Broker Name: Jonathan Rivera
2. Agency or Firm Name: Accretive Global Insurance Services, LLC dba World Risk Management
3. Address: 20 N. Orange Ave, Suite 500, Orlando, FL 32801
4. Email: jon.rivera@wrmlc.com
5. Telephone: 407-445-2414
6. Number of Years in Business: 16
7. Number of Public Entities Served: 100+
8. Number of Municipalities Served in Florida: 70+
9. What is your Florida Premium Volume: \$125,000,000+
10. Do you have experience in placing property coverage for similar sized entities? If yes, please list the name(s) of the entities/municipalities and type of insurance provided.
City of Fruitland Park - Property/Liability/Workers Compensation
City of Inverness - Property/Liability/Workers Compensation
City of Umatilla - Property/Liability/Workers Compensation
11. List key personnel who will be assigned to the City's account, including name, licenses held and years of experience in servicing public entity accounts. Attach additional sheet if necessary.
Jonathan Rivera Licenses: 02-20 and 02-15 Years Serving PE accounts - 10
Joshua Hallon Licenses: 02-20 and 02-15 Years Serving PE accounts - 18
Debbie Young Licenses: 02-20 Years Serving PE accounts - 30+

Additional Comments:
All team members will be available to service the City's needs



TAB G: ADDITIONAL REQUIRED DOCUMENTS

ACORD		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 04/10/2023			
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 AssuredPartners Northeast, LLC, 445 Hamilton Avenue 10th Floor White Plains NY 10601		CONTACT NAME: Jeanne Vezina PHONE (A/C, No, Ext): (914) 761-9000 FAX (A/C, No): (914) 761-3749 E-MAIL ADDRESS: jeanne.vezina@assuredpartners.com					
INSURED AP Governmental Insurance Agency, LLC dba World Risk Management c/o The AssuredPartners Group, LP 450 South Orange Avenue, 4th FL, CNL Tower I Orlando FL 32801		INSURER(S) AFFORDING COVERAGE INSURER A: Charter Oak Fire Insurance Co 25615 INSURER B: Phoenix Insurance Co. 25623 INSURER C: Travelers Property Casualty Company of America 25674 INSURER D: INSURER E: INSURER F:					
COVERAGES		CERTIFICATE NUMBER: CL2341006989		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	POOR WVD	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO. JECT ☐ LOC OTHER:			6301C226996	10/01/2022	10/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COMPROP AGG \$ 2,000,000
B	☒ AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY			BA6N912905	10/01/2022	10/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	☐ UMBRELLA LIAB ☐ EXCESS LIAB ☐ OCCUR ☐ CLAIMS-MADE DED: RETENTION \$			N/A			EACH OCCURRENCE \$ AGGREGATE \$
C	☒ 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	N/A	UB-9P291231-22-14-E	10/01/2022	10/01/2023	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
				N/A			
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Evidence Purposes Only							
CERTIFICATE HOLDER City of Wildwood 100 N Main Street Wildwood FL 34785				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 Richard B. Burt			

© 1988-2015 ACORD CORPORATION. All rights reserved.

ACORD 25 (2016/03)

The ACORD name and logo are registered marks of ACORD



TAB G: ADDITIONAL REQUIRED DOCUMENTS

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 04/10/2023			
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 Mike Smith, Florida Lic. P&C /Surplus # D061127 Axis Insurance Services, LLC 795 Franklin Avenue, Suite 210 Franklin Lakes NJ 07417		CONTACT NAME: Patti Harvey PHONE (A/C, No, Ext): (201) 847-9175 FAX (A/C, No): (201) 847-9174 E-MAIL ADDRESS: pharvey@axisins.com					
INSURED Accretive Global Insurance Services, LLC 20 North Orange Ave, Suite 500 Orlando FL 32801		INSURER(S) AFFORDING COVERAGE INSURER A: Allied World Surplus Lines Insurance Company INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:		NAIC # 24319			
COVERAGES CERTIFICATE NUMBER: R 005 EO22-23 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	COMMERCIAL GENERAL LIABILITY ☒ CLAIMS-MADE ☐ OCCUR Limits are Per Claim ☒ Errors & Omissions (Monoline) GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PROJECT ☐ LOC OTHER:			0313-5278	10/01/2022	10/01/2023	EACH OCCURRENCE \$ 10,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COMP/OP AGG \$ Retention Per Claim \$ 5,000,000 COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						\$ \$ \$ \$ \$ \$
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE DED \$ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	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				PER STATUTE ☐ OTH-ER ☐ E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Professional Services: include Insurance Agent/Broker, MGA, MGU, Claims Administration, Benefits and Third Party Administrator. The definition of Insured in this policy includes both the company and individuals in their roles as Principals, employees, solicitor, sub-agent, sub-broker and independent contractors of the Insured. Individuals in these roles are covered for the listed Professional Services when performed on behalf of the named Insured, The AssuredPartners Group GP, LLC, The AssuredPartners Group, LP or their subsidiaries. (see pg. 2)							
CERTIFICATE HOLDER City of Wildwood 100 N Main Street Wildwood FL 34785				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 			

© 1988-2015 ACORD CORPORATION. All rights reserved.

ACORD 25 (2016/03)

The ACORD name and logo are registered marks of ACORD



Additional Named Insureds	
Other Named Insureds	
The AssuredPartners Group GP, LLC; The AssuredPartners Group, LP	
AssuredPartners, Inc.	
AssuredPartners Capital, Inc	
Accretive Insurance Solutions, Inc.	
Accretive Global Insurance Services, LLC	
Accretive Global Insurance Services, LLC	(dba) Ballator Insurance Group
Accretive Global Insurance Services, LLC	(dba) Manquen Vance
Accretive Global Insurance Services, LLC	(dba) Missouri Rural Services
Accretive Global Insurance Services, LLC	(dba) Non-Profit Insurance Services
Accretive Global Insurance Services, LLC	(dba) Part D Advisors
Accretive Global Insurance Services, LLC	(dba) Pierce Group Benefits, LLC
Accretive Global Insurance Services, LLC	(dba) Platinum Worksite Benefits
Accretive Global Insurance Services, LLC	(dba) World Risk Management
Cornerstone Municipal Advisory Group, LLC	
	dba Manquen Vance
	dba RDS Services, LLC
Egis Insurance Advisors LLC	
Egis Insurance Advisors, LLC dba Egis Insurance & Risk Advisors	

OFAPPINF (02/2007)

COPYRIGHT 2007, AMS SERVICES INC

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: Right of Entry and Access Agreement for Stormwater Planning Services

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date: June 26, 2023 Termination Date: July 31, 2023

Managing Division/Department: Executive

BUDGET IMPACT: None.

HISTORY/FACTS/ISSUES:

The City has engaged Kimley-Horn and Associates, Inc. to perform stormwater planning services on a property located near the intersection of St. Clair Street and Broken Oak Drive. Geotechnical work must be conducted in order to determine the appropriate size and location of the stormwater pond. This Right of Entry and Access Agreement will allow the geotechnical staff to enter the property and conduct the necessary work to further the project.

RIGHT OF ENTRY AND ACCESS AGREEMENT

THIS RIGHT OF ENTRY AND ACCESS AGREEMENT (herein called this “Agreement”) is made and entered into as of June __, 2023, by TRIS L. JAMES, f/k/a Tris L. Tanner (herein called “Grantor”), and The City of Wildwood (herein called “Grantee”).

WITNESSETH:

WHEREAS, Grantor is the owner of the real property, a portion of which is more particularly described on **Exhibit A**, attached hereto and incorporated herein by reference (herein called the “Property”);

WHEREAS, Grantee has requested the right of entry upon and access to the Property for the purpose of geotechnical analysis (herein called the “Due Diligence Activities”) in connection with the proposed acquisition by Grantee of the Property for use as a stormwater retention area;

WHEREAS, Grantor has agreed to grant to Grantee, and Grantee has agreed to accept from Grantor, a non-exclusive, revocable license to enter upon the Property to perform the Due Diligence Activities in accordance with the terms and provisions of this Agreement;

NOW, THEREFORE, for and in consideration of the foregoing premises, the mutual covenants and agreements contained herein, and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, Grantor and Grantee do hereby covenant and agree as follows:

1. Access by Grantee. Subject to Grantee’s compliance with the terms and provisions of this Agreement, until the earlier to occur of (i) **July 31, 2023**; or (ii) the earlier termination of this Agreement, Grantee and Grantee’s agents, employees, contractors, representatives and other designees (herein collectively called “Grantee’s Designees”) shall have the right to enter upon the Property for the purpose of conducting the Due Diligence Activities.

2. Repair and Maintenance. In the event any damage shall be caused to the Property by reason of Grantee’s use, Grantee shall immediately and upon Grantor’s demand, repair and restore any such damaged portions to the condition that prevailed just prior to the occurrence of such damage. However, nothing herein shall be construed as requiring the Grantee to replace any trees, shrubs, brush, or other vegetation disturbed during the Due Diligence Activities.

3. Hold Harmless. To the extent permitted by Florida law and without waiving any statutory and constitutional sovereign immunity protections, the Grantee shall defend, indemnify and hold harmless Grantor and its affiliates from and against any claims, proceedings, judgments, costs and liabilities, including reasonable attorneys’ fees resulting from injury to persons and damage to property arising out of the negligent or wrongful act or omission of any employee of the Grantee (while acting within the scope of their employment) or any person under a contractual relationship with Grantee (while acting within the scope of their contractual relationship) in connection with Grantee’s use of the Property during Due Diligence Activities described herein, subject to applicable law including Section 768.28, Florida Statutes.

Notwithstanding the provisions of this Agreement, any agreement by Grantee to defend, indemnify, and hold Grantor harmless shall in no way be deemed to be a comprehensive waiver of the Grantee's sovereign immunity and any deemed waiver of the Grantee's sovereign immunity under this Agreement shall be limited to the plain terms of this Agreement. Furthermore, any waiver of Grantee's sovereign immunity shall not be broadly construed so as to inure to the benefit of any third party, including, but not limited to, any other person, business or public entity.

4. Successors. To the extent any rights or obligations under this Agreement remain in effect, this Agreement shall be binding upon and enforceable against, and shall inure to the benefit of, the parties hereto and their respective heirs, legal representatives, successors and permitted assigns.

5. Limitations. Grantor does not hereby convey to Grantee any right, title or interest in or to the Property, but merely grants the specific rights and privileges hereinabove set forth.

6. No Recording of Agreement or Memorandum of Agreement. In no event shall this Agreement or any memorandum hereof be recorded, and any such recordation or attempted recordation shall constitute a breach of this Agreement by the party responsible for such recordation or attempted recordation.

7. Non-Exclusive. The rights granted herein are non-exclusive in nature.

8. Amendments. Any amendments to this Agreement shall be effective only when duly executed by Grantor and Grantee.

9. No Third Party Beneficiary Rights. This Agreement is entered into for the sole benefit of Grantor and Grantee and no other parties are intended to be direct or incidental beneficiaries of this Agreement and no third party shall have any right in, under or to this Agreement. No special right of access by the general public is conveyed by this Agreement.

10. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of Florida. Venue for any legal proceedings brought pursuant to this Agreement shall be exclusively in Sumter County, Florida.

11. Assignment of Agreement. Neither Grantor nor Grantee may assign or transfer their respective rights or obligations under this Agreement without first obtaining the prior written consent of the other, which consent may be granted or withheld in the sole and absolute discretion of the applicable party.

12. Counterparts. This Agreement may be executed simultaneously in one or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

13. Headings. Headings in this Agreement are for convenience only and shall not be used to interpret or construe its provisions.

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the day and year set forth above.

Grantor:



Tris L. James, f/k/a Tris L. Tanner

Grantee:

City of Wildwood, a municipal corporation

By: _____

Ed Wolf, Mayor

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Change Order #4 for CR 209 Water Main Extension Phase 1 in the Amount of \$72,377.13

REQUESTED ACTION: Staff recommends approval.

CONTRACT: Vendor/Entity: Hartman Civil, Inc.
Effective Date: 6/26/2023 Termination Date:
Managing Division/Department: Finance Department

BUDGET IMPACT: Funds are available in account 401-530-70-7319 (CR 209 Water Main Extension).

HISTORY/FACTS/ISSUES:

On September 27, 2021, the City Commission awarded Hartman Civil, Inc. the CR 209 Water Main Extension project for Phase I. The project is now complete and the final pay application was approved by the City Commission on June 12, 2023. When processing the final pay application through Accounts Payable, a variance was identified from what our records show was left to pay to close out the project. The Finance department reached out to Kimley-Horn and Associates, Inc., the City's engineer, for clarification, and upon further research, it appears there was an additional change order that Kimley-Horn had processed, but the City never received. Attached is the missing change order #4 which addresses the incorrect unit prices for the 12" PVC water main, 20" steel casing, and 24" steel casing from change order #3. The previous contract price was \$1,425,526.84, and the final contract price after this change order totals \$1,497,903.97.

Kimley-Horn and City staff have reviewed the attached change order for completion.

SECTION 00850 – CONTRACT CHANGE ORDER

Change Order No. 4

Date of Issuance: 11/08/2022

Effective Date: 11/08/2022

Project: CR 209 Water Main Extension Phase 1	Owner: City of Wildwood	Owner's Contract No.:
Contract: CR 209 Water Main Extension Phase 1		Date of Contract: October 5, 2021
Contractor: Hartman Civil, Inc.		Engineer's Project No.: 142173326

The Contract Documents are modified as follows upon execution of this Change Order:

This change order corrects the incorrect unit prices for 12" PVC Water Main, 20" and 24" Steel Casing from Change Order No.3

Attachments (list documents supporting change):

Change Order Request 04

CHANGE IN CONTRACT PRICE:

Original Contract Price:

\$ 1,347,788.00

[Increase] ~~[Decrease]~~ from previously approved Change Orders No. 0 to No. 3:

\$ 77,738.84

Contract Price prior to this Change Order:

\$ 1,425,526.84

[Increase] ~~[Decrease]~~ of this Change Order:

\$ 72,377.13

Contract Price incorporating this Change Order:

\$ 1,497,903.97

CHANGE IN CONTRACT TIMES:Original Contract Times: ☐ Working days ☒ Calendar days

Substantial completion (days or date): June 14, 2022

Ready for final payment (days or date): July 14, 2022

[Increase] ~~[Decrease]~~ from previously approved Change Orders No. 0 To No. 3:

Substantial completion (days): 225

Ready for final payment (days): 225

Contract Times prior to this Change Order:

Substantial completion (days or date): 1/25/2023

Ready for final payment (days or date): 2/24/2023

[Increase] ~~[Decrease]~~ of this Change Order:

Substantial completion (days or date):

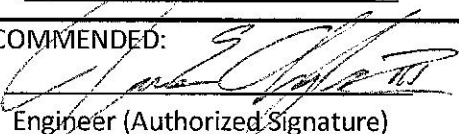
Ready for final payment (days or date):

Contract Times with all approved Change Orders:

Substantial completion (days or date): 1/25/2023

Ready for final payment (days or date): 2/24/2023

RECOMMENDED:

By: 
Engineer (Authorized Signature)

Date: 11/08/2022

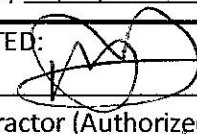
Approved by Funding Agency (if applicable):

ACCEPTED:

By: _____
Owner (Authorized Signature)

Date: _____

ACCEPTED:

By: 
Contractor (Authorized Signature)

Date: 11/16/22

Date: _____

END OF SECTION

SECTION 00300 – BID FORM

1. The undersigned Bidder does hereby declare that he has carefully examined the Invitation to Bid, the Instructions to Bidders, Project Manual and Construction Plans, and project addenda relating to the above entitled matter and the work, and has also examined the site.
2. The undersigned Bidder hereby declares that he has based his proposal on the conditions as they exist on site and has noted all items of work required of the project that is not illustrated on the plans.
3. The undersigned does hereby offer and agree to furnish all materials, to fully and faithfully construct, perform and execute all work in the above titled matter in accordance with the Plans, Drawings and Specifications relating thereto.
4. The undersigned does hereby declare that the prices so stated cover all expenses of every kind incidental to the completion of said work, and the contract therefore, including all claims that may arise through damages or any other causes whatsoever.
5. The undersigned does hereby declare that he shall make no claim on account of minor variation of the approximate estimate in the QUANTITIES or work to be done, nor on account of any misunderstanding or misconception of the nature of the work to be done or the grounds or place where it is to be done.
6. The Bidder acknowledges that (1) each Bid Unit Price includes an amount considered by Bidder to be adequate to cover Contractor's overhead and profit for each separately identified item, and (2) estimated quantities are not guaranteed, and are solely for the purpose of comparison of Bids, and final payment for all unit price Bid items will be based on actual quantities, determined as provided in the Contract Documents.
7. The undersigned does also declare and agree that he will commence the work within ten (10) days after notification by the ENGINEER to do so and will complete the work fully and in every respect on or before the time specified in said contract.
8. The undersigned further agrees that the UNIT PRICES submitted on the Bid Form shall govern all errors in extension or addition and shall void the total base bid submitted on the attached sheet. The corrected extension and addition of all items shall be considered to be the correct base bid for comparison purposes.
9. The undersigned further agrees that the UNIT PRICES submitted on the Bid Form will expire if a contract is not executed within ninety (90) days from the date of bid deadline, and that the Contractor will be fully released from any obligations of this Bid Form.
10. The undersigned agrees that this bid is based on substantially completing the project within two hundred seventy (270) calendar days and final completion within three hundred fifteen (315) calendar days from the date of Notice to Proceed. The Contractor further agrees to pay, as liquidated damages, the sum of one thousand (\$1,000) dollars for each consecutive calendar day thereafter.
11. The Bidder acknowledges having received the following project addenda:

No. <u>1</u> , Date: <u>8/10/2021</u>	No. _____, Date: _____
No. <u>2</u> , Date: <u>8/27/2021</u>	No. _____, Date: _____
No. <u>3</u> , Date: <u>8/30/2021</u>	No. _____, Date: _____
12. By submission of this bid, each bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, that this bid has been arrived at independently, without consultation, communication or agreement as to any matter relating to this bid with any other bidder or with any competitor.

Hartman Civil Construction Co., Inc.
9200 SW Hwy. 484
Ocala, FL 34481
O: (352) 690-1525
F: (844) 270-4832
E: office@hartmancivil.com
CGC060004

BID FORM

CR 209 WATER MAIN EXTENSION

ITEM #	DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	BID AMOUNT
GENERAL					
1	MOBILIZATION	LS	1	\$ 43,699.00	\$ 43,699.00
2	MAINTENANCE OF TRAFFIC	LS	1	\$ 30,000.00	\$ 30,000.00
3	SURVEY LAYOUT AND RECORD DRAWINGS	LS	1	\$ 20,000.00	\$ 20,000.00
4	PROFESSIONAL SITE VIDEO (PRE & POST CONSTRUCTION)	LS	1	\$ 2,500.00	\$ 2,500.00
5	RESTORATION GENERAL (INCLUDES ALL SITE RESTORATION FOR OPEN TRENCH CONSTRUCTION, COMPLETE)	LS	1	\$ 100,000.00	\$ 100,000.00
6	OPEN CUT ROADWAY RESTORATION AND OVERLAY MILLING EXIST ASPHALT PAVT., 1 1/2" AVG DEPTH (INCLUDES CURB AND GUTTER, MARKINGS PER PLANS AND SPECIFICATIONS, COMPLETE)	SY	3248	\$ 50.00	\$ 162,400.00
7	OVERLAY SUPERPAVE ASPHALTIC CONC., TRAFFIC C (MARKINGS PER PLANS AND SPECIFICATIONS, COMPLETE)	TON	291	\$ 200.00	\$ 58,200.00
8	TRANSITION TAPER AND OVERLAY	SY	1329	\$ 25.00	\$ 33,225.00
9	DRIVEWAY RESTORATION (6-INCH CONCRETE)	SY	138.0	\$ 110.00	\$ 15,180.00
10	DRIVEWAY RESTORATION (OTHER)	SY	227.0	\$ 75.00	\$ 17,025.00
11	UNSUITABLE MATERIALS	CY	1000.0	\$ 25.00	\$ 25,000.00
WATER MAIN					
12	HYDRANT ASSEMBLY	EA	7	\$ 5,500.00	\$ 38,500.00
13	8" PVC WATER MAIN (INCLUDING RESTRAINTS AND FITTINGS, COMPLETE)	LF	5,068	\$ 37.00	\$ 187,516.00
14	8" DIP WATER MAIN (INCLUDING RESTRAINTS AND FITTINGS, COMPLETE)	LF	32	\$ 120.00	\$ 3,840.00
15	12" PVC WATER MAIN (INCLUDING RESTRAINTS AND FITTINGS, COMPLETE)	LF	5,474	\$ 67.00	\$ 366,758.00
16	8" PVC WATER MAIN BY HDD (INCLUDES FITTINGS AND RESTRAINTS)	LF	229	\$ 90.00	\$ 20,610.00
17	INSTALL 20" STEEL CASING BY OPEN CUT	LF	129	\$ 150.00	\$ 19,350.00
18	INSTALL 24" STEEL CASING BY OPEN CUT	LF	151	\$ 160.00	\$ 24,160.00
19	8" GATE VALVE	EA	7	\$ 2,300.00	\$ 16,100.00
20	12" GATE VALVE	EA	9	\$ 3,700.00	\$ 33,300.00
21	ABOVE GRADE OFFSET AIR RELEASE VALVE	EA	3	\$ 5,300.00	\$ 15,900.00
22	BACTERIOLOGICAL SAMPLE POINTS	EA	12	\$ 1,000.00	\$ 12,000.00
23	RESTRAINED 12" PLUG	EA	1	\$ 750.00	\$ 750.00
24	RESTRAINED 12" CAP	EA	1	\$ 850.00	\$ 850.00
25	8" TAPPING SLEEVE AND VALVE	EA	1	\$ 5,000.00	\$ 5,000.00
26	TEMP. JUMPER CONNECTION (INCLUDES 8 AND 4-INCH TAPPING SADDLE, LINE STOPS PER PLAN AND DETAILS FOR A COMPLETE JUMPER CONNECTION)	EA	1	\$ 9,000.00	\$ 9,000.00
27	REMOVE EXISTING WATER MAIN	EA	1,875	\$ 11.00	\$ 20,625.00
28	TIE IN TO EXISTING WATER MAIN (INCLUDES REQUIRED SPOOL PIECE AND COUPLING FOR A COMPLETE CONNECTION)	EA	1	\$ 2,500.00	\$ 2,500.00
29	INSTALL NEW WATER MAIN ASSEMBLY AND RECONNECT EXISTING SERVICE TO PROPOSED WATER MAIN	EA	11	\$ 1,800.00	\$ 19,800.00
30	FENCE REMOVAL AND REPLACEMENT	LS	1	\$ 20,000.00	\$ 20,000.00
	CONSTRUCTION SUBTOTAL				\$ 1,323,788.00
	PAYMENT AND PERFORMANCE BOND				\$ 24,000.00
	BID TOTAL				\$ 1,347,788.00

Hartman Civil Construction Co., Inc.
 9200 SW Hwy. 484
 Ocala, FL 34481
 O: (352) 690-1525
 F: (844) 270-4832
 E: office@hartmancivil.com
 CGC060004

CR 209 Water Main Extension – Phase I

Section 00300 – Page 2 of 3

Lump Sum Grand Total amounts are to be shown in both words and figures. In case of discrepancies, the amount in words will govern.

LUMP SUM GRAND TOTAL: \$ 1,347,788.00

WORDS: ONE MILLION THREE HUNDRED FORTY-SEVEN THOUSAND
SEVEN HUNDRED EIGHTY-EIGHT DOLLARS AND ZERO CENTS
THIS PROPOSAL DATED THIS 1st day of September, 2021

ATTEST:

Witness:

Wenona Scott
Signature

Wenona Scott
Printed Name

By:

Michael A. Hartman
Authorized Signature (Principal)

Michael A. Hartman, President
Printed Name, Title

Hartman Civil Construction Co., Inc.
Company Name

Address:

9200 SW Hwy. 484

Ocala, Florida 34481

46-5262082

Employee I.D. No.

CGC060004

Florida State Certified General
Contractor's License Number

Telephone Number:

(352) 690-1525

END OF SECTION

SECTION 00302 – PUBLIC ENTITY CRIMES STATEMENT

NOTICE TO BIDDERS: This form must be properly completed, executed and returned with the bid documents in order for your bid to be considered. Failure to do so will result in automatic disqualification.

SWORN STATEMENT UNDER SECTION 287133(3)(a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

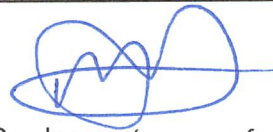
(To be signed in the presence of a notary public or other officer authorized to administer oaths.)

STATE OF Florida

COUNTY: Marion

Before me, the undersigned authority, personally appeared Michael A. Hartman

who, being by me first duty sworn, made the following statement:



1. The business address of Hartman Civil Construction Co., Inc. (name of bidder or contractor) is 9200 SW Hwy. 484 Ocala, FL 34481.

2. My relationship Hartman Civil Construction Co., Inc. (name of bidder or contractor) is President (relationship such as sole proprietor, partner, president, vice president).

3. I understand that a public entity crime as defined in Section 287.133 of the Florida Statutes includes a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or such an agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

4. I understand that "convicted" or "conviction" is defined by the statute to mean a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilt or nolo contendere.

5. I understand that "affiliate" is defined by the statute to mean (1) a predecessor or successor of a person or a corporation convicted of a public entity crime, or (2) an entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime, or (3) those officer, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate, or (4) a person or corporation who knowingly entered into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months.

6. Neither the bidder or contractor nor any officer, director, executive, partner, shareholder, employee, member or agent who is active in the management of the bidder or contractor nor any affiliate of the bidder or contractor has been convicted of a public entity crime subsequent to July 1, 1989.

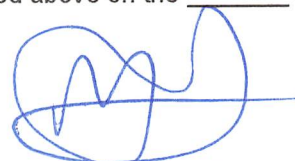
(Draw a line through paragraph 6 if paragraph 7 below applies.)

7. There has been a conviction of a public entity crime by the bidder or contractor, or an officer, director, executive, partner, shareholder, employee, member or agent of the bidder or contractor who is active in the management of the bidder or contractor or an affiliate of the bidder or contractor. A determination has been made pursuant to Section 287.133(3) by order of the Division of Administrative Hearings that it is not in the public interest for the name of the convicted person or affiliate to appear on the convicted vendor list. The name of the convicted person or affiliate is n/a. A copy of the order of the Division of Administrative Hearings is attached to this statement.

(Draw a line through paragraph 7 if paragraph 6 above applies.)

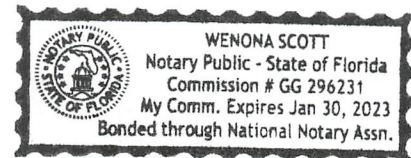
Sworn to and subscribed before me in the state and county first mentioned above on the 1st day of September, 2021.

Wenona Scott
(Signature of Notary Public)


(Affix seal)

Wenona Scott
(Printed Name)

My Commission Expires on 1-30-2023



END OF SECTION

SECTION 00303 – DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with the Florida Statute 287.087 hereby certifies that
Hartman Civil Construction Co., Inc. does:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about dangers of drug abuse in the workplace, the business' policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees from drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employees will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 1893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

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



Bidder's Signature

9-1-2021

Date

END OF SECTION

THE AMERICAN INSTITUTE OF ARCHITECTS



AIA Document A310

Bid Bond

KNOW ALL MEN BY THESE PRESENTS, that we

Hartman Civil Construction Company, Inc., 9200 SW Hwy 484, Ocala, FL 34481
as Principal, hereinafter called the Principal, and

Argonaut Insurance Company, 225 W. Washington St., 24th Floor, Chicago, IL 60606
a corporation duly organized under the laws of the State of Illinois as Surety, hereinafter called the Surety, are held and firmly bound unto

City of Wildwood, 100 N. Main St., Wildwood, FL 34785
as Oblige, hereinafter called the Oblige, in the sum of FIVE Percent of the amount bid

Dollars (\$))
for the payment of which sum well and truly to be made, the said Principal and the said Surety, bind ourselves, our heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

WHEREAS, the Principal has submitted a bid for
142173326; County Road 209 Water Main Extension - Phase 1, Wildwood, FL

NOW, THEREFORE, if the Oblige shall accept the bid of the Principal and the Principal shall enter into a Contract with the Oblige in accordance with the terms of such bid, and give such bond or bonds as may be specified in the bidding or Contract Documents with good and sufficient surety for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof, or in the event of the failure of the Principal to enter such Contract and give such bond or bonds, if the Principal shall pay to the Oblige the difference not to exceed the penalty hereof between the amount specified in said bid and such larger amount for which the Oblige may in good faith contract with another party to perform the Work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect.

Signed and sealed this 1st day of September, 2021.

Kenona Scott
(Witness)

Walter
(Witness)

Hartman Civil Construction Company, Inc.

(Principal)

(Seal)

MICHAEL A. HARTMAN, Pres
Argonaut Insurance Company

(Surety)

(Seal)

Benjamin H. French, Attorney-in-Fact
& Florida Licensed Resident Agent



Argonaut Insurance Company
Deliveries Only: 225 W. Washington, 24th Floor
Chicago, IL 60606
United States Postal Service: P.O. Box 469011, San Antonio, TX 78246
POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS: That the Argonaut Insurance Company, a Corporation duly organized and existing under the laws of the State of Illinois and having its principal office in the County of Cook, Illinois does hereby nominate, constitute and appoint:

L. Dale Waldorff, K. Wayne Walker, Pamela L. Jarman, Benjamin H. French, Paul A. Locascio, Rebekah F. Sharp, Trava Ridlon

Their true and lawful agent(s) and attorney(s)-in-fact, each in their separate capacity if more than one is named above, to make, execute, seal and deliver for and on its behalf as surety, and as its act and deed any and all bonds, contracts, agreements of indemnity and other undertakings in suretyship provided, however, that the penal sum of any one such instrument executed hereunder shall not exceed the sum of:

\$95,000,000.00

This Power of Attorney is granted and is signed and sealed under and by the authority of the following Resolution adopted by the Board of Directors of Argonaut Insurance Company:

"RESOLVED, That the President, Senior Vice President, Vice President, Assistant Vice President, Secretary, Treasurer and each of them hereby is authorized to execute powers of attorney, and such authority can be executed by use of facsimile signature, which may be attested or acknowledged by any officer or attorney, of the Company, qualifying the attorney or attorneys named in the given power of attorney, to execute in behalf of, and acknowledge as the act and deed of the Argonaut Insurance Company, all bond undertakings and contracts of suretyship, and to affix the corporate seal thereto."

IN WITNESS WHEREOF, Argonaut Insurance Company has caused its official seal to be hereunto affixed and these presents to be signed by its duly authorized officer on the 1st day of June, 2021.

Argonaut Insurance Company



by: _____

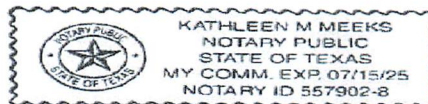
Joshua C. Betz, Senior Vice President

STATE OF TEXAS

COUNTY OF HARRIS SS:

On this 1st day of June, 2021 A.D., before me, a Notary Public of the State of Texas, in and for the County of Harris, duly commissioned and qualified, came THE ABOVE OFFICER OF THE COMPANY, to me personally known to be the individual and officer described in, and who executed the preceding instrument, and he acknowledged the execution of same, and being by me duly sworn, deposed and said that he is the officer of the said Company aforesaid, and that the seal affixed to the preceding instrument is the Corporate Seal of said Company, and the said Corporate Seal and his signature as officer were duly affixed and subscribed to the said instrument by the authority and direction of the said corporation, and that Resolution adopted by the Board of Directors of said Company, referred to in the preceding instrument is now in force.

IN TESTIMONY WHEREOF, I have hereunto set my hand, and affixed my Official Seal at the County of Harris, the day and year first above written.



Kathleen M. Meeks

(Notary Public)

I, the undersigned Officer of the Argonaut Insurance Company, Illinois Corporation, do hereby certify that the original POWER OF ATTORNEY of which the foregoing is a full, true and correct copy is still in full force and effect and has not been revoked.

IN WITNESS WHEREOF, I have hereunto set my hand, and affixed the Seal of said Company, on the 1st day of September, 2021



James Bluzard

James Bluzard, Vice President-Surety

IF YOU HAVE QUESTIONS ON AUTHENTICITY OF THIS DOCUMENT CALL (833) 820 - 9137.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
08/31/2021

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 Brown & Brown of Florida, Inc. 1720 SE 16th Avenue, Suite 301 Ocala FL 34471		CONTACT NAME: Melanie North PHONE (A/C, No, Ext): (352) 732-5010 FAX (A/C, No): (352) 732-5344 E-MAIL ADDRESS: melanie.north@bbocala.com																						
INSURED Hartman Civil Construction Company, Inc. 9200 SW Highway 484 Ocala FL 34481		<table border="1"><thead><tr><th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr></thead><tbody><tr><td>INSURER A :</td><td>Valley Forge Insurance Company</td><td>20508</td></tr><tr><td>INSURER B :</td><td>The Continental Insurance Company</td><td>35289</td></tr><tr><td>INSURER C :</td><td>XL Specialty Insurance Company</td><td>37885</td></tr><tr><td>INSURER D :</td><td></td><td></td></tr><tr><td>INSURER E :</td><td></td><td></td></tr><tr><td>INSURER F :</td><td></td><td></td></tr></tbody></table>		INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A :	Valley Forge Insurance Company	20508	INSURER B :	The Continental Insurance Company	35289	INSURER C :	XL Specialty Insurance Company	37885	INSURER D :			INSURER E :			INSURER F :		
INSURER(S) AFFORDING COVERAGE		NAIC #																						
INSURER A :	Valley Forge Insurance Company	20508																						
INSURER B :	The Continental Insurance Company	35289																						
INSURER C :	XL Specialty Insurance Company	37885																						
INSURER D :																								
INSURER E :																								
INSURER F :																								

COVERAGES

CERTIFICATE NUMBER: 21/22

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	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☒ PROJECT ☐ LOC OTHER:	Y		6076329503	04/15/2021	04/15/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 15,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
B	AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS NON-OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☒ PIP \$10,000			BUA6076287205	04/15/2021	04/15/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	☒ UMBRELLA LIAB ☐ EXCESS LIAB DED ☒ RETENTION \$ 10,000 OCCUR CLAIMS-MADE			CUE6076329484	04/15/2021	04/15/2022	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000 \$
A	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	N/A	WC6076329498	04/15/2021	04/15/2022	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Leased/Rented Equipment			UM00063350MA21A	04/15/2021	04/15/2022	Amount 220,000 Deductible 1,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Sealed Bid for CR 209 Water Main Extension- Phase 1
Project #142173326

City of Wildwood is listed as additional insured with regards to the General Liability policy when required by written contract/ agreement.

CERTIFICATE HOLDER

CANCELLATION

City of Wildwood 100 North Main St. Wildwood FL 34785	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

© 1988-2015 ACORD CORPORATION. All rights reserved.



Ron DeSantis, Governor

Halsey Beshears, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE GENERAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

HARTMAN, MICHAEL ALLEN

HARTMAN CIVIL CONSTRUCTION COMPANY, INC.

9200 SW HIGHWAY 484
OCALA FL 34481

LICENSE NUMBER: CGC060004

EXPIRATION DATE: AUGUST 31, 2022

Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.



Florida Department of Transportation

RON DESANTIS
GOVERNOR

605 Suwannee Street
Tallahassee, FL 32399-0450

KEVIN J. THIBAUT, P.E.
SECRETARY

June 9, 2021

HARTMAN CIVIL CONSTRUCTION COMPANY, INC.
9200 SW HWY. 484
OCALA, FLORIDA 34442

RE: CERTIFICATE OF QUALIFICATION

Dear Sir/Madam:

The Department of Transportation has qualified your company for the type of work indicated below. Unless your company is notified otherwise, this Certificate of Qualification will expire 6/30/2022. However, the new application is due 4/30/2022.

In accordance with S.337.14 (1) F.S. your next application must be filed within (4) months of the ending date of the applicant's audited annual financial statements.

If your company's maximum capacity has been revised, you can access it by logging into the Contractor Prequalification Application System via the following link:

<HTTPS://fdotwp1.dot.state.fl.us/ContractorPreQualification/>

Once logged in, select "View" for the most recently approved application, and then click the "Manage" and "Application Summary" tabs.

FDOT APPROVED WORK CLASSES:

DRAINAGE, GRADING, GRASSING, SEEDING AND SODDING, SIDEWALK, Underground Utilities.

You may apply for a Revised Certificate of Qualification at any time prior to the expiration date of this certificate according to Section 14-22.0041(3), Florida Administrative Code (F.A.C.), by accessing your most recently approved application as shown above and choosing "Update" instead of "View." If certification in additional classes of work is desired, documentation is needed to show that your company has done such work with your own forces and equipment or that experience was gained with another contractor and that you have the necessary equipment for each additional class of work requested.

All prequalified contractors are required by Section 14-22.006(3), F.A.C., to certify their work underway monthly in order to adjust maximum bidding capacity to available bidding capacity. You can find the link to this report at the website shown above.

Sincerely,

Darlene Anderson, for

Alan Autry, Manager
Contracts Administration Office

AA:cg

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

HARTMAN CIVIL CONSTRUCTION COMPANY, INC.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC

☐ C Corporation

☒ S Corporation

☐ Partnership

☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner, unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

9200 SW HWY 484

6 City, state, and ZIP code

OCALA, FL 34481

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

____ - ____ - ____

or

Employer identification number

4 6 - 5 2 6 2 0 8 2

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign
Here

Signature of
U.S. person ▶

Date ▶

1/22/18

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.



Company ID Number: 861885

Approved by:

Employer Hartman Civil Construction Co. Inc.	
Name (Please Type or Print) Hartman Michael	Title President
Signature Electronically Signed	Date 03/16/2015
Department of Homeland Security – Verification Division	
Name (Please Type or Print) USCIS Verification Division	Title
Signature Electronically Signed	Date 03/16/2015

CR 209
REVISION NO.3 AND 4 CHANGE ORDER NO.3 TAKE OFF

ITEM #	DESCRIPTION	UNIT	TOTAL QUANTITY	UNIT PRICE	BID AMOUNT
GENERAL					
1	MOBILIZATION	LS	1	\$ 2,500.00	\$ 2,500.00
2	MAINTENANCE OF TRAFFIC	LS	1	\$ 3,500.00	\$ 3,500.00
3	OPEN CUT ROADWAY RESTORATION AND OVERLAY MILLING EXIST ASPHALT PAV'T., 1 1/2" AVG DEPTH (INCLUDES CURB AND GUTTER, MARKINGS PER PLANS AND SPECIFICATIONS, COMPLETE)	SY	-2573	\$ 50.00	\$ (128,670.67)
4	OVERLAY SUPERPAVE ASPHALTIC CONC, TRAFFIC C	TON	-212	\$ 200.00	\$ (42,461.32)
5	TRANSITION TAPER AND OVERLAY	SY	-922	\$ 25.00	\$ (23,050.00)
WATER MAIN					
6	8"PVC WATER MAIN	LF	-140	\$ 37.00	\$ (5,180.00)
7	8"HDPE WATER MAIN BY HDD	LF	140	\$ 120.00	\$ 16,800.00
8	12" PVC WATER MAIN	LF	-860	\$ 72.75	\$ (62,528.63)
9	12" HDPE WATER MAIN BY HDD INCLUDING FITTINGS	LF	860	\$ 160.00	\$ 137,520.00
10	ADDITIONAL PVC FITTINGS	LS	1	\$ 13,000.00	\$ 13,000.00
11	INSTALL 20" STEEL CASING BY OPEN CUT	LF	-78	\$ 472.50	\$ (36,855.00)
12	INSTALL 24" STEEL CASING BY OPEN CUT	LF	-151	\$ 440.00	\$ (66,440.00)
13	INSTALL NEW WATER MAIN ASSEMBLY AND RECONNECT EXISTING SERVICE TO PROPOSED WATER MAIN	EA	1	\$ 1,800.00	\$ 1,800.00
14	FENCE REMOVAL AND REPLACEMENT	LS	1	\$ 5,825.00	\$ 5,825.00
15	RESTOCKING FEES	LS	1	\$ 49,298.80	\$ 49,298.80
CR 229					
16	CR 229 CHANGE ORDER	LS	1	\$ 2,400.00	\$ 2,400.00
CHANGE ORDER 3					\$ (132,541.81)

CR 209
REVISION NO.3 AND 4 CHANGE ORDER NO.4 TAKE OFF

ITEM #	DESCRIPTION	UNIT	TOTAL QUANTITY	UNIT PRICE	BID AMOUNT
GENERAL					
1	MOBILIZATION	LS	1	\$ 2,500.00	\$ 2,500.00
2	MAINTENANCE OF TRAFFIC	LS	1	\$ 3,500.00	\$ 3,500.00
3	OPEN CUT ROADWAY RESTORATION AND OVERLAY MILLING EXIST ASPHALT PAV'T., 1 1/2" AVG DEPTH (INCLUDES CURB AND GUTTER, MARKINGS PER PLANS AND SPECIFICATIONS, COMPLETE)	SY	-2573	\$ 50.00	\$ (128,670.67)
4	OVERLAY SUPERPAVE ASPHALTIC CONC, TRAFFIC C	TON	-212	\$ 200.00	\$ (42,461.32)
5	TRANSITION TAPER AND OVERLAY	SY	-922	\$ 25.00	\$ (23,050.00)
WATER MAIN					
6	8"PVC WATER MAIN	LF	-140	\$ 37.00	\$ (5,180.00)
7	8"HDPE WATER MAIN BY HDD	LF	140	\$ 120.00	\$ 16,800.00
8	12" PVC WATER MAIN	LF	-860	\$ 67.00	\$ (57,586.50)
9	12" HDPE WATER MAIN BY HDD INCLUDING FITTINGS	LF	860	\$ 160.00	\$ 137,520.00
10	ADDITIONAL PVC FITTINGS	LS	1	\$ 13,000.00	\$ 13,000.00
11	INSTALL 20" STEEL CASING BY OPEN CUT	LF	-78	\$ 150.00	\$ (11,700.00)
12	INSTALL 24" STEEL CASING BY OPEN CUT	LF	-151	\$ 160.00	\$ (24,160.00)
13	INSTALL NEW WATER MAIN ASSEMBLY AND RECONNECT EXISTING SERVICE TO PROPOSED WATER MAIN	EA	1	\$ 1,800.00	\$ 1,800.00
14	FENCE REMOVAL AND REPLACEMENT	LS	1	\$ 5,825.00	\$ 5,825.00
15	RESTOCKING FEES	LS	1	\$ 49,298.80	\$ 49,298.80
CR 229					
16	CR 229 CHANGE ORDER	LS	1	\$ 2,400.00	\$ 2,400.00
CHANGE ORDER 4					\$ (60,164.69)

Change Order 3 (Wrong Prices)	\$ (132,541.81)
Change Order 3 (Right Prices)	\$ (60,164.69)
Change Order 4 (Difference)	\$ 72,377.13

Change Order 3 Contract Price	\$ 1,425,526.84
Change Order 4 Contract Price	\$ 1,497,903.97

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Intent to Award the Ashley Well No. 2 Project to Sawcross, Inc. in the Amount of \$277,000.00

REQUESTED ACTION: Staff recommends approval.

CONTRACT: Vendor/Entity: Sawcross, Inc.
Effective Date: 06/14/2023 Termination Date:
Managing Division/Department: Utility Department Water Division

BUDGET IMPACT: This is a budgeted project in the 22/23 fiscal year budget. Funds are available in account 404-533-70-7352 (Ashley Water Treatment Plant Construction).

HISTORY/FACTS/ISSUES:

Well No. 2 for the Ashley Water Treatment Plant (WTP) has been identified in the City's Capital Improvement program. The City's consulting engineer Kimley-Horn & Assoc. completed the engineering analysis, design, and bid specifications to add a second well at the Ashley WTP. Bids were solicited in accordance with the design standards. Only one bid was received and opened on June 1, 2023. The only respondent, Sawcross, Inc., bid amount was \$277,000.00. Kimley-Horn has reviewed the submittal to ensure compliance with the bid specifications and provided a letter in support of issuing a Notice of Intent (NOI) to award the project to Sawcross, Inc. as the only responsive bidder. Please see the attached recommendation letter and bid tabulation.



June 12, 2023

Mr. Jason McHugh
City of Wildwood
100 N. Main Street
Wildwood, Florida 34785

**RE: Ashley WTP Well No. 2 Pump Addition; Bid Recommendation Letter
Kimley-Horn Project No. 142173353**

Dear Mr. McHugh:

Kimley-Horn reviewed the construction bid received for the above referenced Project. As of the deadline on June 1, 2023, at 2:30pm, 1 bid was received and opened at 2:35pm. The bid received was a responsive bid. Attached is a bid tabulation of the submitted bid.

Based upon our review of the documents submitted, Sawcross, Inc. is the lowest responsive bidder with a bid in the amount of \$277,000.00. Kimley-Horn does not object to the City of Wildwood issuing a Notice of Intent to Award to Sawcross, Inc. for this Project.

Sincerely,
KIMLEY-HORN

A handwritten signature in blue ink, appearing to read 'James Clayton'.

James "Trey" Clayton, P.E.

JEC/sab

Attachment: Bid Tabulation

Cc: File

K:\OCA_Uilities\Wildwood\Projects\142173353 - Ashley Well WTP\BID ADMIN\Well No. 2 Well Pump Addition\Bid Tabulations\Ljm230612jec_Recommendation Letter.docx

BID FORM CITY OF WILDWOOD ASHLEY WTP WELL NO.2 WELL PUMP ADDITION					
ITEM #	DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	BID AMOUNT
I. GENERAL				Sawcross, Inc.	
1	MOBILIZATION/DEMOBILIZATION	LS	1	\$ 25,000	\$ 25,000
2	SITE WORK AND PREPARATION	LS	1	\$ 10,000	\$ 10,000
3	SURVEY AND RECORD DRAWINGS	LS	1	\$ 2,000	\$ 2,000
4	RESTORATION, COMPLETE	LS	1	\$ 5,000	\$ 5,000
II. WATER SUPPLY DISTRIBUTION					
5	VERTICAL TURBINE WELL PUMP (WELL PUMP AND MOTOR TO BE SUPPLIED BY OWNER. CONTRACTOR SCOPE TO INCLUDE ADDITIONAL PIPING AND APPURTUNANCES AND INSTALLATION OF OWNER SUPPLIED EQUIPMENT FOR A COMPLETE PROJECT)	LS	1	\$ 12,000	\$ 12,000
6	WELL HEAD PIPING (CONTRACTOR SCOPE TO INCLUDE PIPING, VALVES, CONCRETE PAD, AND INSTALLATION OF OWNER SUPPLIED EQUIPMENT FOR A COMPLETE PROJECT)	LS	1	\$ 124,000	\$ 124,000
7	YARD PIPING (COMPLETE PER PLANS AND SPECIFICATIONS)	LS	1	\$ 20,000	\$ 20,000
8	CHLORINATION SYSTEM (CHEMICAL METERING PUMP TO BE SUPPLIED BY CITY. CONTRACTOR SCOPE TO INCLUDE ADDITIONAL PIPING AND TUBING AND INSTALLATION OF CITY SUPPLIED METERING PUMP FOR A COMPLETE PROJECT)	LS	1	\$ 5,000	\$ 5,000
9	ELECTRICAL I&C (PANEL, FIELD EQUIPMENT, AND SPARE PARTS TO BE SUPPLIED BY OWNER. CONTRACTOR SCOPE TO INCLUDE SITE CODUIT, WIRING, INSTALLATION OF OWNER SUPPLIED EQUIPMENT AND INSTRUMENTATION AND COORDINATIONG START UP FOR A COMPLETE PROJECT)	LS	1	\$ 70,000	\$ 70,000
WELL PUMP ADDITION (ASHLEY WTP WELL NO. 2) SUBTOTAL					\$ 273,000
PAYMENT AND PERFORMANCE BOND					\$ 4,000
BID TOTAL					\$ 277,000

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Intent to Award the Continental Country Club Lift Station/SR 44 Forcemain Project to DB Civil Construction in the Amount of \$3,434,899.00

REQUESTED ACTION: Staff recommends approval.

CONTRACT: Vendor/Entity: DB Civil Construction, LLC
Effective Date: 06/14/2023 Termination Date:
Managing Division/Department: Utility Department Wastewater Division

BUDGET IMPACT: This is a budgeted project in the 22/23 fiscal year budget. Funds are available in account 401-535-60-6770 (SR 44 FM / CCC Decommissioning).

HISTORY/FACTS/ISSUES:

The SR 44 Forcemain and Continental Master Lift Station are part of the Continental Country Club Wastewater Treatment Facility (WWTF) decommissioning project that has been identified in the City's Capital Improvement Program. The City retained Kimley-Horn and Associates, Inc. to complete the engineering analysis, design, and bid specifications to extend an 8" forcemain from the Continental Country Club WWTF to the Wildwood Country Resort Lift Station, including the construction of a Master Lift Station at the Continental WWTF. The construction specifications were completed and bids were solicited in accordance with the design standards. A total of four (4) qualified bids were received and opened on June 8, 2023. DB Civil Construction, LLC provided the lowest bid in the amount of \$3,434,899.00. Kimley-Horn has reviewed all the submittals to ensure compliance with the bid specification and has provided a letter in support of issuing a Notice of Intent (NOI) to award the project to DB Civil Construction, LLC as the lowest responsive bidder. Please see the attached recommendation letter and bid tabulations.



June 12, 2023

Mr. Jason McHugh
City of Wildwood
100 N. Main Street
Wildwood, Florida 34785

**RE: CCC Lift Station SR 44 Force Main; Bid Recommendation Letter
Kimley-Horn Project No. 142173365**

Dear Mr. McHugh:

Kimley-Horn reviewed the construction bids received for the above referenced Project. As of the deadline on June 8, 2023, at 3:00pm, 4 bids were received and opened at 3:05pm. All bids received were responsive bids. Attached is a bid tabulation of the submitted bids.

Based upon our review of the documents submitted, DB Civil Construction, LLC. is the lowest responsive bidder with a bid in the amount of \$3,434,899.00. Kimley-Horn does not object to the City of Wildwood issuing a Notice of Intent to Award to DB Civil Construction, LLC. for this Project.

Sincerely,

KIMLEY-HORN

James "Trey" Clayton, P.E.

JEC/sab

Attachment: Bid Tabulation

Cc: File

K:\OCA_Uilities\Wildwood\Projects\142173365-CCC WWTF Decom - SR44 FM\Bid Admin\CCC Lift Station SR 44 FM\Bid Tabs\Ljm230612jec_Recommendation Letter.docx

BID TABULATIONS CITY OF WILDWOOD CCC WWTF DECOMISSIONING AND SR 44 FORCE MAIN											
ITEM #	DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	BID AMOUNT	Unit Price	Bid Amount	Unit Price	Bid Amount	Unit Price	Bid Amount
GENERAL				US Water Services		DB Civil		Art Walker		Cain Enterprises, LLC Eng Sol International	
1	MOBILIZATION	LS	1	\$ 92,786.00	\$ 92,786.00	\$233,000.00	\$ 233,000.00	\$ 77,000.00	\$ 77,000.00	\$ 250,000.00	\$ 250,000.00
2	MAINTENANCE OF TRAFFIC	LS	1	\$ 44,066.00	\$ 44,066.00	\$ 20,000.00	\$ 20,000.00	\$ 37,200.00	\$ 37,200.00	\$ 2,205.00	\$ 2,205.00
3	ENVIRONMENTAL PROTECTION	LS	1	\$ 34,753.00	\$ 34,753.00	\$ 25,000.00	\$ 25,000.00	\$ 24,000.00	\$ 24,000.00	\$ 5,470.00	\$ 5,470.00
4	SURVEY LAYOUT AND RECORD DRAWINGS	LS	1	\$ 46,748.00	\$ 46,748.00	\$ 45,000.00	\$ 45,000.00	\$ 36,000.00	\$ 36,000.00	\$ 45,570.00	\$ 45,570.00
5	PROFESSIONAL SITE VIDEO TESTING (PRE & POST CONSTRUCTION)	LS	1	\$ 23,575.00	\$ 23,575.00	\$ 1,939.00	\$ 1,939.00	\$ 4,200.00	\$ 4,200.00	\$ 4,410.00	\$ 4,410.00
6	RESTORATION, COMPLETE	LS	1	\$ 183,545.00	\$ 183,545.00	\$ 80,000.00	\$ 80,000.00	\$314,967.21	\$ 314,967.21	\$ 9,577.50	\$ 9,577.50
7	DEWATERING	LS	1	\$ 241,870.00	\$ 241,870.00	\$ 40,000.00	\$ 40,000.00	\$109,572.00	\$ 109,572.00	\$ 19,404.00	\$ 19,404.00
CCC LIFT STATION											
8	LIFT STATION SITE WORK (TO INCLUDE GRADING, CONCRETE EQUIPMENT PADS, CONCRETE DUMPSTER PAD WITH TRENCH DRAIN, SITE LANDSCAPING AND IRRIGATION)	LS	1	\$ 66,936.00	\$ 66,936.00	\$ 100,000.00	\$ 100,000.00	\$ 45,852.00	\$ 45,852.00	\$ 23,760.00	\$ 23,760.00
9	CCC LIFT STATION (CONTRACTOR SCOPE TO INCLUDE PRECAST WET WELL, POSITIVE DISPLACEMENT BLOWER, PUMPS, PUMP RAILS, PUMP BASE, HATCHES, AND SETTABLES, ALL PIPING, VALVES, VALVE VAULT, FLOW METER VAULT, HATCHES, INSTALLATION, PAINTING AND COATING FOR PIPING AND MISC. MATERIALS AND STARTUP OF PUMPS AND BLOWER FOR A COMPLETE PROJECT)	LS	1	\$ 536,017.00	\$ 536,017.00	\$540,000.00	\$ 540,000.00	\$490,140.00	\$ 490,140.00	\$ 587,045.51	\$ 587,045.51
10	CAST IN PLACE SCREENING STRUCTURE AND COATING OF STRUCTURE	LS	1	\$ 178,690.00	\$ 178,690.00	\$ 65,000.00	\$ 65,000.00	\$ 54,240.00	\$ 54,240.00	\$ 48,495.00	\$ 48,495.00
11	CCC FLOW THROUGH SCREEN (INCLUDING MECHANICAL SCREEN, WASHER COMPACTOR, AND SCREEN CONTROL PANEL FOR A COMPLETE FUNCTIONING SCREENING SYSTEM)	EA	1	\$ 356,396.00	\$ 356,396.00	\$330,000.00	\$ 330,000.00	\$450,000.00	\$ 450,000.00	\$ 400,614.50	\$ 400,614.50
12	LIFT STATION ELECTRICAL AND INSTRUMENTATION (CONTRACTOR SCOPE TO INCLUDE SUPPLY, INSTALLATION, AND STARTUP OF ALL SITE CONDUIT, WIRING, METER, MINY POWER ZONE, COMBO CONTROL PANEL, GENERATOR, ATS, FLOW METER, PRESSURE TRANSDUCER, LEVEL TRANSDUCER, BACKUP FLOATS, AND ALL SCADA INTEGRATION PER PLANS AND SPECIFICATIONS FOR A COMPLETE PROJECT.)	LS	1	\$ 380,523.00	\$ 380,523.00	\$260,000.00	\$ 260,000.00	\$462,000.00	\$ 462,000.00	\$ 300,564.78	\$ 300,564.78
13	8" SDR-26 PVC GRAVITY MAIN (INCLUDING FITTINGS AND CLEANOUTS, COMPLETE)	LF	74	\$ 596.00	\$ 44,104.00	\$ 240.00	\$ 17,760.00	\$ 140.00	\$ 10,360.00	\$ 383.72	\$ 28,395.28
14	ELECTRICAL SERVICE ALLOWANCE	AL	1	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
FORCE MAIN											
15	8" DR 18 C900 PVC FORCE MAIN (INCLUDING FITTINGS AND RESTRAINTS, COMPLETE)	LF	12,350	\$ 69.30	\$ 855,855.00	\$ 62.00	\$ 765,700.00	\$ 62.50	\$ 771,875.00	\$ 60.28	\$ 744,458.00
16	8" GATE VALVE	EA	23	\$ 3,124.00	\$ 71,852.00	\$ 3,500.00	\$ 80,500.00	\$ 2,870.00	\$ 66,010.00	\$ 2,529.46	\$ 58,177.58
17	ABOVE GROUND AIR RELEASE VALVE	EA	18	\$ 6,313.00	\$ 113,634.00	\$ 6,000.00	\$ 108,000.00	\$ 6,725.00	\$ 121,050.00	\$ 4,572.20	\$ 82,299.60
18	8" RESTRAINED PLUG	EA	1	\$ 7,359.00	\$ 7,359.00	\$ 800.00	\$ 800.00	\$ 890.00	\$ 890.00	\$ 1,171.92	\$ 1,171.92
19	8" DR 18 C900 FUSIBLE PVC FORCE MAIN, DIRECTIONAL DRILL (INCLUDING FITTINGS AND RESTRAINTS, COMPLETE)	LF	6,400	\$ 124.60	\$ 797,440.00	\$ 98.00	\$ 627,200.00	\$ 115.00	\$ 736,000.00	\$ 160.44	\$1,026,816.00
20	REMOVE PLUG AND TIE IN TO EXISTING 8" FORCE MAIN	EA	1	\$ 11,745.00	\$ 11,745.00	\$ 4,400.00	\$ 4,400.00	\$ 3,965.00	\$ 3,965.00	\$ 3,147.00	\$ 3,147.00
21	OPEN CUT ROADWAY RESTORATION AND OVERLAY MILLING EXIST ASPH PAVT, 2" AVG DEPTH (INCLUDES CURB AND GUTTER, MARKINGS PER PLANS AND SPECIFICATIONS, COMPLETE)	SY	57	\$ 254.00	\$ 14,478.00	\$ 160.00	\$ 9,120.00	\$ 245.00	\$ 13,965.00	\$ 176.93	\$ 10,085.01
22	OVERLAY SUPERPAVE ASPHALTIC CONC, 1" AVERAGE DEPTH, TRAFFIC C (MARKINGS PER PLANS AND SPECIFICATIONS, COMPLETE)	TON	4	\$ 998.00	\$ 3,992.00	\$ 1,200.00	\$ 4,800.00	\$ 600.00	\$ 2,400.00	\$ 1,470.00	\$ 5,880.00
23	TRANSITION TAPER	SY	283	\$ 150.00	\$ 42,450.00	\$ 50.00	\$ 14,150.00	\$ 65.00	\$ 18,395.00	\$ 78.62	\$ 22,249.46
24	DRIVEWAY RESTORATION (ASPHALT)	SY	48	\$ 177.00	\$ 8,496.00	\$ 110.00	\$ 5,280.00	\$ 160.00	\$ 7,680.00	\$ 122.50	\$ 5,880.00
25	DRIVEWAY RESTORATION (CONCRETE)	SY	140	\$ 115.80	\$ 16,212.00	\$ 90.00	\$ 12,600.00	\$ 195.00	\$ 27,300.00	\$ 110.25	\$ 15,435.00
26	DRIVEWAY RESTORATION (OTHER)	SY	62	\$ 137.00	\$ 8,494.00	\$ 40.00	\$ 2,480.00	\$ 30.00	\$ 1,860.00	\$ 58.80	\$ 3,645.60
27	SIDEWALK RESTORATION	SY	38	\$ 121.00	\$ 4,598.00	\$ 90.00	\$ 3,420.00	\$ 125.00	\$ 4,750.00	\$ 110.25	\$ 4,189.50
CONSTRUCTION SUBTOTAL				US Water Services	\$ 4,196,614.00	DB Civil	\$ 3,406,149.00	Art Walker	\$3,901,671.21	Cain Enterprises, LLC Eng Sol International	\$3,718,946.24
PAYMENT AND PERFORMANCE BOND					\$ 40,797.00		\$ 28,750.00		\$ 25,000.00		\$ 46,486.53
BID TOTAL					\$ 4,237,411.00		\$ 3,434,899.00		\$3,926,671.21		\$3,765,432.77

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Ramp Improvements at the Baker House in the Amount of \$22,329.83

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT: Funds are available in line item 001-572-30-4601 (Building Repairs and Maintenance).

HISTORY/FACTS/ISSUES:

The Baker House ramp was installed approximately 10 years ago as a donation from a local contractor. The wood on the ramp has deteriorated and is no longer safe for use. This ramp is the only entrance at the Baker House for anyone unable to use the stairs in the front. This project will also include the replacement of all handrails to bring them into compliance with ADA standards. This project must be completed before staff can reopen the house to the public.

A total of four companies were contacted, with only two responses received. One company visited the site to quote the project but has not responded to repeated attempts to obtain the physical proposal or estimate. The second company, Jasper Services, submitted the attached quote for the project in the amount of \$22,329.83.

Jasper Services

3522557507
jasperservices01@gmail.com

ESTIMATE
EST0003

DATE
05/24/2023

TOTAL
USD \$22,329.83

TO
Amanda
6106 County Rd 44 A, Wildwood, FL
☎ 3526262202
asalazar@wildwood-fl.gov

DESCRIPTION	RATE	QTY	AMOUNT
Exterior Pressure Treated Stair Case Frame	\$15.98	3	\$47.94
Stepping System Brackets	\$1.88	3	\$5.64
1x6x8' Grey Composite Deck Boards	\$16.00	221	\$3,536.00
6' White Composite Rail Section	\$110.00	16	\$1,760.00
8' Composite Rail Section	\$196.05	4	\$784.20
6' Composite Deck Rail Section	\$130.00	2	\$260.00
Deck Rail Bracket	\$30.26	20	\$605.20
4x4 Post Cap	\$7.98	22	\$175.56
4x4x8 Exterior Pressure Treated Wood	\$10.78	22	\$237.16
4x4x8 Composite Sleeve	\$96.00	22	\$2,112.00
#10x2-1/2" Composite Deck Screws	\$37.98	8	\$303.84
2x6x18" Gauge Single Moint Joist Hanger	\$1.88	32	\$60.16
Remove Existing Deck	\$1,500.00	1	\$1,500.00
Wood Disposal	\$300.00	1	\$300.00
Delivery	\$150.00	1	\$150.00

DESCRIPTION	RATE	QTY	AMOUNT
Composite Deck Installation	\$8,550.00	1	\$8,550.00
New Composite Deck Stair System Installation	\$1,250.00	1	\$1,250.00
Compsite Deck Material Hardware	\$692.13	1	\$692.13
SUBTOTAL			\$22,329.83
TAX			\$0.00
TOTAL			USD \$22,329.83

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Approval of RFP No. 2023-14 for Continuing Professional Electrical Services

REQUESTED ACTION: Staff recommends approval

CONTRACT: Vendor/Entity:
Effective Date: Termination Date:
Managing Division/Department:

BUDGET IMPACT: Funding for professional contractual services is allocated from 001-541-30-3400.

HISTORY/FACTS/ISSUES:

The Public Works Administration has solicited professional electrical services through a Request for Proposals (RFP). As a result of the request, the City received three (3) proposals on June 8th, 2023. An evaluation committee consisting of Assistant Public Works Director Thomas Rigwood, Facility Trades Supervisor Terry Bunn, and Facility Trades Technician Dillon Jones all reviewed the proposals and ranked each vendor's proposal in accordance with the specified request. The committee has scored and ranked the vendor's proposals and is recommending the Commission authorize the City Manager to execute a continuing services agreement with the top two ranked vendors of Gibson Electric and Accurate Power & Technology, Inc.



Memorandum

To: Jeremy Hockenbury, Public Works Director

From: Thomas J. Rigwood, Asst. Director of Public Works

C.C.: Terry Bunn, Facilities Trade Supervisor

Date: 6/15/23

Re: Electrical Services Bid

On June 8, 2023, three (3) bids for Electrical Services for the City of Wildwood facilities were received, publicly opened and read aloud. The resulting bid tab from the opening is attached. The specifications specifically outlined a selection of a minimum of two (2) qualified licensed electrical contractors to furnish all materials, labor, supervision, transportation, inspections, permits, licenses, equipment, and any incidentals necessary to provide maintenance and miscellaneous electrical services, repairs, installation, and general lighting as needed for the various City facilities. Examples of common services under this agreement will be the installation and repairs of decorative street lights, park lights, installation and/or relocation of electrical outlets, the installation and/or relocation of office lighting, the installation and/or replacement of electrical service panels and disconnects, the electrical service installation and/or replacement of utility lift stations, stormwater lift stations, wastewater pumps and associated devices, and/or re-wiring of existing facilities for City facilities.

The bid outlined that the contract's duration shall be for a fixed term or with no time limitation except that the contract must provide a termination clause unless otherwise indicated.

The Public Works staff evaluation committee reviewed the bid packets and determined the vendors of choice were Gibson Electric and Accurate Power & Technology, Inc. Both vendors' detailed bids included information about the company and its employees, customized specifications of electrical services and operations to ensure the electrical services of the City's facilities are maintained and cared for per the contract.

The evaluation committee was comprised of the following Public Works staff members:

- Thomas J. Rigwood, Asst. Director of Public Works
- Terry Bunn, Facilities Trade Supervisor
- Dillion Jones, Facilities Trade Technician

The evaluation process was completed with the following results.

Vendor	Rigwood	Bunn	Jones, D.	Total	Ranking
Gibson Electric	96	85	72	253	1
Accurate Power & Tech., Inc.	87	84	71	242	2
Archis, Inc.	98	82	61	241	3

Recommendation:

I recommend, with your approval, that we accept the bids from Gibson Electric and Accurate Power & Technology, Inc. for Electrical Services for City facilities.

Attachments:

- Gibson Electric bid proposal
- Accurate Power & Technology bid proposal
- Electrical Services Bid Tabs
- Staff Evaluation Forms

CITY OF WILDWOOD



SUBMITTAL REQUIREMENTS CHECKLIST

WILDWOOD
FLORIDA

Project: RFP #2(2023-14

Electrical Services

Thomas Rigwood

6/9/23
Date

Valerie Hodges

Thomas Rigwood Assistant Public Works Director

Valerie Hodges Administrative Assistant Date

Notes:

APPLICANTS																				
	Original	4 Copies	Electronic Copy	Cover Page	Statement of Interest	Vendor Profile (Form 1)	Team Composition and Resumes	Bid Form (Form 2)	Illustrative Work (Form 3)	References	Proposer's Certification/Addenda Acknowledgement Form	Proposal Form	Statement of Terms and Conditions	Hold Harmless Agreement	Drug Free Workplace Certificate	Public Entity Crimes Form	Conflict of Interest Disclosure Form	Certificate of Insurability	E-Verify Document	
Accurate Power and Technology, Inc.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Base 3, LLC. dba Gibson Electric	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Achis, Inc.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

CITY OF WILDWOOD

FINAL RANKING



WILDWOOD
FLORIDA

Project: Electrical Services

RFQ # 2023-14

		EVALUATORS				
APPLICANTS						
		Thomas Rigwood	Terry Bunn	Dillon Jones	Total Points	Ranking
	Accurate Power & Tecnology	87	84	71	242	2
	Gibson Electric	96	85	72	253	1
	Archis, Inc.	98	82	61	241	3

CITY OF WILDWOOD



SHORTLIST SELECTION EVALUATION

RFP # 2023-14

WILDWOOD
FLORIDA

Project: Electrical Services

Selection Committee Member Signature:

Notes:

Scale: Rate each applicant on the identified points on a scale of 1 (lowest) to the highest.

APPLICANTS

	INITIAL RANKING FOR SHORTLIST					
	20 pts.	20 pts.	20 pts.	20 pts.	20 pts.	
Capability and Qualifications						
Proven Experience						
Resources and Availability						
Client References and Past Performance						
Prices Proposed						
Total Points						
Archis	8	10	13	10	20	61
Subsens	12	15	13	17	15	72
Accurate	15	13	16	19	8	71

CITY OF WILDWOOD



WILDWOOD
FLORIDA

SHORTLIST SELECTION EVALUATION

RFP # 2023-14

Project: Electrical Services

Selection Committee Member Signature:

Thomas J. [Signature]

Notes:

Scale: Rate each applicant on the identified points on a scale of 1 (lowest) to the highest.

APPLICANTS	INITIAL RANKING FOR SHORTLIST					Total Points
	Capability and Qualifications 20 pts.	Proven Experience 20 pts.	Resources and Availability 20 pts.	Client References and Past Performance 20 pts.	Prices Proposed 20 pts.	
<i>Academy Dental Technology</i>	18	18	20	17	14	87
<i>Gibson Electric</i>	20	20	19	19	18	96
<i>Archis, Inc.</i>	20	20	19	19	20	98

CITY OF WILDWOOD



WILDWOOD
FLORIDA

SHORTLIST SELECTION EVALUATION

RFP # 2023-14

Project: Electrical Services

Selection Committee Member Signature:

Notes:

Scale: Rate each applicant on the identified points on a scale of 1 (lowest) to the highest.

APPLICANTS	INITIAL RANKING FOR SHORTLIST					Total Points
	20 pts.	20 pts.	20 pts.	20 pts.	20 pts.	
	Capability and Qualifications	Proven Experience	Resources and Availability	Client References and Past Performance	Prices Proposed	
Gibson Electric	16	17	17	18	17	85
Accurate Power And Technology	20	18	19	19	8	84
Archis, Inc.	15	16	17	14	18	82

RFP COVER PAGE

Name of Vendor, Entity or Organization:

Base 3, LLC dba Gibson Electric

Federal Employer Identification Number (FEIN): 20-0953712

State of Florida License Number (If Applicable): EC0000651

Name of Contact Person: Larry (AI) Booth, Jr

Title: COO/CFO

E-Mail Address: abooth@intec360.com

Mailing Address: 2695 NW 4th Street

Street Address (if different):

City, State, Zip: Ocala, FL 34475

Telephone: 352-351-0145

Fax:

Organizational Structure – Please Check One:

Corporation ☐ Partnership ☐ Proprietorship ☐ Joint Venture ☐ Other ☒

If Corporation:

Date of Incorporation:

State of Incorporation:

States Registered in as Foreign Corporation:

Authorized Signature:

Print Name: Larry (AI) Booth, Jr.

Signature:



Title: COO/CFO

Phone: 352-351-0145

This document must be completed and returned with your Submittal.

Table of Contents

- A. Statement of Interest**
- B. Vendor Profile**
- C. Team Composition and Resumes**
- D. Bid Form**
- E. Illustrative Work**
- F. References**
- G. Additional Information**
- H. Additional Required Documents**



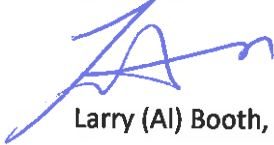
Tab A

June 6, 2023

City of Wildwood
100 North Main Street
Wildwood, FL 34785

Coming from one of the oldest electrical contractors in North Central Florida, Gibson Electric is a full service electrical contractor. With coverage throughout Central and Northeast Florida, we service some of the best clients in the area which have included: Lockheed Martin, Century Link, Pilot Flying J, Marion County Public Schools, Alachua County School Board and the City of Gainesville. We understand the needs of the City of Wildwood for repair, alteration, and improvement to existing electrical equipment and facilities. We understand that this can include things such as installation, relocation and repair of various forms of lighting and electrical outlets, panels, and disconnects. These are all services that we have provided to the above mentioned entities. We look forward to continuing our relationship with the City of Wildwood.

Sincerely,



Larry (Al) Booth, Jr.

Tab B

FORM 1

VENDOR PROFILE

Base 3, LLC dba Gibson Electric

Submitted by (Company Name):

Corporation

Partnership

Individual

Joint Venture

Other ☒

Describe: Limited Liability Company

Florida Electrical Contractor License Number: EC0000651

Expiration Date: 08/31/2024

Office Location: 2695 NW 4th St. Ocala, FL 34475

Number of people in your organization: 17

Length of time the Contractor has been doing business under this name in Florida: 18

years

Length of time your firm has provided electrical services to governmental clients: 18

years

Under what other name(s) has your firm operated: N/A

Has or is your firm currently involved in any formal court proceedings regarding any of your electrical contracts?

YES

(attach a detailed explanation)

NO ☒



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

ELECTRICAL CONTRACTORS' LICENSING BOARD

THE ELECTRICAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES



LICENSE NUMBER: EC0000651

EXPIRATION DATE: AUGUST 31, 2024

Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.



Tab C



Experience/Key Personnel:

Base 3, LLC dba Gibson Electric has been in existence since 2004. Key personnel consist of the following:

Name: Louie F. Wise, III

Title: Chief Executive Officer

Email Address: lw3@InTec360.com

Years of Experience: Thirty-Three

Days Dedicated: One

of Non Accounts: Various

Job Description: Responsible for the business strategies and plans to align near term and long term objectives.

Experience:

- State Certified Mechanical Contractor
- University of Florida Bachelor of Science Building Construction
- LEED Certified
- OSHA 10
- Organized, structured, and executed business model that grew revenue From \$3 Million to over \$30 Million with expansion of full time employees (FTE) from 15 FTE to over 200 FTE. Expanded areas served from 60 mile Radius from Ocala to the Southeast.

Name: Nick Moreno
Title: Operations Manager
Email Address: NMoreno@GEFlorida.com
Years of Experience: Twenty-Five
Days Dedicated: Six
of Non Accounts: Various
Job Description: Responsibilities include efficient and effective organized execution of maintenance activities, services on demand, repairs and emergency response.
Experience:

- Lock out tag out certified
- OSHA 30
- Arc flash suit certified

Name: John Cammack
Title: Foreman
Email Address: jcammack@geflorida.com
Years of Experience: Twenty-Five
Days Dedicated: Five
of Non Accounts: Various
Job Description: Responsible for project coordination and quality for assigned project.
Experience:

- Lock out tag out certified
- OSHA 30
- Arc flash suit certified



Tab D

FORM 2

BID FORM

Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by City for the duration of the three (3)-year term contract.

JOB CLASSIFICATION	REGULAR HOURS HOURLY RATE	AFTER HOURS HOURLY RATE
Master Electrician	\$ 110.00	\$ 138.00
Journeyman/Supervisor	\$ 66.00	\$ 93.00
Apprentice/Laborer	\$ 33.00	\$ 60.00
Permit Fee Reimbursement	<u>At Actual Cost</u>	

EQUIPMENT WITH OPERATOR	HOURLY RATE
Bucket Truck or Lift	\$ 185.00
Auger w/ Pole Setter	\$ 320.00
Trencher	\$ 133.00
	\$
	\$

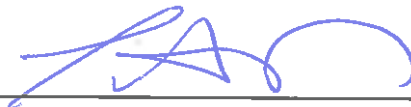
PARTS & MATERIALS MARK-UP	PERCENTAGE
Percentage (Not to exceed 10%)	10%

Notes:

1. "After Hours" price shall not exceed two times that of the normal operating price.
2. Contractors will bill for parts and materials at wholesale cost + percentage mark-up in an amount not to exceed 10 percent. Supplier invoices must be attached to all invoices as applicable.
3. Costs for additional equipment rates can be included in rows provided under EQUIPMENT WITH OPERATOR table.

If requested by City, Contractor must return any damaged parts to City after performing repairs.

Authorized Signatory: _____



(Signature)

Title: _____

COO/CFO



GibsonElectric
POWER SERVICES

Tab E

FORM 3

ILLUSTRATIVE WORK (SEE ATTACHED SHEETS)

Work by vendor best illustrates current proposals relevant to the RFP that have been/is being accomplished by personnel that shall be assigned to the City. List no more than five (5) projects.

<u>Project Name & Location</u> <u>Project Manager:</u>		<u>Client's Name & Address</u>
<u>Completion Date (Actual or Estimated):</u>		
<u>Contractor Fees (In Thousands)</u>		<u>Client Contact Name, Title, Email Address and Telephone Number:</u>
<u>Entire Project:</u> \$	<u>Work for which vendor was/is responsible:</u> \$	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible)		
<u>Nature of Vendor's Responsibility in Project</u> (Please give quantitative indications wherever possible)		
<u>Vendor's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the City's Project</u>		



References:

Fidelity Manufacturing – Ocala, FL

POC: Jay Callender - (352)414-4700

Contract Value: \$107,000.00

Duration: June 12th 2019 – Current

Scope of work: Install new 480V service for 20+ new welding receptacles across the facility. Install new 800A MDP with two 400A sub panels. Trench and install new underground conduit for primary power. Set new transformer pad for 480V transformer, and install meter can and CT cabinet provided by electric company.

Federal Wildlife Services – Crystal River, FL

POC: Matt West – (334)233-2581

Contract Value: \$280,000.00

Duration: February 2019 – Current

Scope of work: Install new light fixtures, gear, receptacles, Fire Alarm, data, and security items across three new buildings. Trench and install new conduit from utility company power pole through meter to MDP. Install new site parking lot fixtures and poles with concrete base and dedicated service for adjacent parking lot area.

VA Medical Center – Lake Nona, FL

POC: Erik Store – (813)777-3630

Contract Value: \$90,000.00

Duration: October 2018 – Current

Scope of work: Provide power to new HVAC equipment for USP 797/800 Pharmacy renovation upgrades, and all other associated equipment.

Flying Biscuit – The Villages, FL

POC: Bryce Kelly (Owner) – (352)281-5101

Contract Value: \$56,000.00

Duration: March 2019 – May 2019

Scope of work: Provided VE lighting package from supplier, installed breakers in existing panel gear, installed new receptacles, and new data phone patch panel with wire for restaurant. Tested all items for proper operation after all owner equipment was delivered.

Willow – Oxford, FL

POC: Pam Campbell (General Manager)

Contract Value: \$29,000.00

Duration: August 2019 – Current

Scope of work: Provide emergency service on damaged 2500A main breaker prior to hurricane, while anticipating on call service if an issue occurs during hurricane. Furnish and install refurbished 2500A main breaker, while coordinating shut down with SECO power, and the local municipal inspection agency to bring power back to facility in one day. All while ensuring that the site generator is in operable condition for patients on life supporting oxygen, which cannot be offline for any amount of time.



Tab F

REFERENCE DOCUMENTATION FORM

List at least five (5) clients during the past ten (10) years for which you provided a comparable amount of goods or services substantially similar to those specified in the solicitation in the spaces provided below. Provide the Company name, contact person, address, email address, telephone number, and date services were performed, as described.

1. Company Name: Alachua County Board of County Commissioners

Owner's Name: Alachua County

Description of goods or services provided: On Demand Electrical Services

Contract Amount: On Going

Start and End Date of
Contract: 09/30/20 - 09/30/23

Contact Person: John Morris

Address: 12 SE 1st Street, 2nd Floor, Gainesville, FL 32601

Telephone Number: 352-264-6900

Email Address: JMorris@AlachuaCounty.US

2. Company Name: Azar Services

Owner's Name: _____

Description of goods or services provided: On Demand Electrical Services

Contract Amount: On Going

Start and End Date of
Contract: On Going

Contact Person: Kelly Lee

Address: 3735 Harrison Road, Suite 700, Loganville, GA 30052

Telephone Number: 770-979-8226

Email Address: CustomerService@AzarServices.com

3. Company Name: Ocala Housing Authority
Owner's Name: Ocala Housing Authority
Description of goods or services provided: On Demand Electrical Services
Contract Amount: On Going
Start and End Date of Contract: 04/30/22 - 04/30/23
Contact Person: Michelle Jennings
Address: 1629 NW 4th Street, Ocala, FL 34478
Telephone Number: 352-620-3666
Email Address: _____

4. Company Name: Waller Construction
Owner's Name: Hernando County School District
Description of goods or services provided: West Hernando Middle School Ceiling and Lighting Upgrades
Contract Amount: \$104,551
Start and End Date of Contract: 07/02/2020 - 10/31/2020
Contact Person: Jackie Stanton
Address: PO Box 2963, Lakeland, FL 33808
Telephone Number: 352-807-8300
Email Address: Jackie@WallerGroup.com

5. Company Name: City of Wildwood

Owner's Name: City of Wildwood

Description of goods or services provided: On Demand Electrical Services

Contract Amount: On Going

Start and End Date of Contract: 10/15/2019 - 10/15/2023

Contact Person: Terry Bunn

Address: 743 Huey St.
Wildwood, FL 34785

Telephone Number: 352-661-6145

Email Address: tbunn@wildwood-fl.gov



GibsonElectric
POWER SERVICES

Tab G



June 6, 2023

City of Wildwood
100 North Main Street
Wildwood, FL 34785

Re: Statement of Contractor's Capabilities

To whom it may concern,

Base 3, LLC dba Gibson Electric offers specialized services in Service on Demand (SOD), Emergency Response, Capital Improvement and Energy Efficient Upgrades. Gibson Electric performs under critical conditions and restricted time constraints for multi-site clientele in many industry sectors including telecommunications, defense, federal government, municipalities, universities and retail services.

Primarily focused on large commercial, institutional, and government clients, we are dedicated to providing quality, integrity, value and 100% customer satisfaction. Serving the heart of Florida since 2004, Gibson Electric is quickly becoming the area's leading commercial power services installation and repair company. In addition, our in-house, HVAC controls, fire alarm, data, and building services divisions will be utilized as necessary to reinforce our commitment to meeting the needs of the client.

Our client driven values and technical expertise have built lasting relationships with some of the most sought after clients in our area including: University of Florida, University of Central Florida, University of South Florida, Lockheed Martin Corporation, Seminole County Board of County Commissioners, Alachua County Board of County Commissioners, Hernando County School District, Hernando County Board of County Commissioners, Marion County School District, City of Wildwood and many other valued clients. It is this experience we intend to use to efficiently care for your electrical services.

Our approach to the scope of services in this contract will be similar to our approach under our previous contract with the City of Wildwood.

Our supervisors, superintendents, and technicians have the necessary experience, licenses, certifications and factory training to perform all major electrical, low voltage, mechanical, controls, and general construction repairs and installations district wide. Our technicians are well trained and we are dedicated to the improvement of our workforce from the ground up. Over the years, our company has participated in over \$160,000 in match grants from the state for training of employees throughout our organization. This included training for infection control procedures, OSHA 10 & 30 hour courses, VFD startup and maintenance, fire alarm, DDC controls, welding, VRF and VRV factory authorized installation and service, etc.



Personnel:

- 8 Service Technicians
- 2 Superintendents
- 1 Estimator/Quotation Specialist
- 1 Project Manager
- 1 Project Coordinator
- 4 Office Personnel

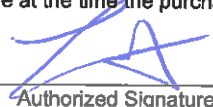
Should there be any questions, or if you need additional information I am available to discuss via the information provided below.

Thank you for the opportunity to earn your business,

Larry (Al) Booth, Jr.
abooth@intec360.com
352-351-0145

Tab H

PROPOSER'S CERTIFICATION

Submit To: City of Wildwood 100 N Main Street Wildwood, FL 34785 352-330-1330 352-330-1338 (fax)		CITY OF WILDWOOD REQUEST FOR PROPOSAL (RFP) CERTIFICATION AND ADDENDA ACKNOWLEDGMENT	
DUE DATE: 06/08/2023	DUE TIME: 11:30 AM	RFP # 2023 - 14	
TITLE: ELECTRICAL SERVICES			
VENDOR NAME: Base 3, LLC dba Gibson Electric		PHONE NUMBER: 352-351-0145	
VENDOR MAILING ADDRESS: 2695 NW 4 th Street		FAX NUMBER:	
CITY/STATE/ZIP: Ocala, FL 34475		E-MAIL ADDRESS: abooth@intec360.com	
"I, the undersigned, certify that I have reviewed the addenda listed below (list all addenda received to date). I understand that timely commencement will be considered in award of this RFP and that cancellation of award will be considered if commencement time is not met, and that untimely commencement may be cause for termination of contract. I further certify that the services will meet or exceed the RFP requirements. I, the undersigned, declare that I have carefully examined the RFP, specifications, terms and conditions as applicable for this Request, and that I am thoroughly familiar with all provisions and the quality and type of coverage and services specified. I further declare that I have not divulged, discussed, or compared this RFP with any other Offeror and have not colluded with any Offerors or parties to an RFP whatsoever for any fraudulent purpose."			
Addendum #	Addendum #	Addendum #	Addendum #
"I certify that this quote is made without prior understanding, agreement, or connection with any corporation, vendor, or person submitting an RFP for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this response and that the offer is in compliance with all requirements of the RFP, including but not limited to certification requirements. In conducting offers with an agency for CITY OF WILDWOOD, respondent agrees that if this RFP is accepted, the respondent will convey, sell, assign, or transfer to the City of Wildwood all rights, title and interest in and to all causes of action it may now or hereafter acquire under the anti-trust laws of the United States for price fixing relating to the particular commodities or services purchased or acquired by the CITY. At the City of Wildwood discretion, such assignment shall be made and become effective at the time the purchasing agency renders final payment to the respondent."			
Larry (AI) Booth, Jr., COO/CFO Authorized Agent Name, Title (Print)		 Authorized Signature	6-6-2023 Date
<i>This form must be completed and returned with your Submittal</i>			

PROPOSALS FORM FOR CITY OF WILDWOOD



Name of Vendor Submitting Proposals Base 3, LLC dba Gibson Electric

Name of Person Submitting Proposals Larry (Al) Booth, Jr.

PROPOSER ACKNOWLEDGMENT

"The undersigned hereby declares that he/she has informed himself/herself fully in regard to all conditions to the work to be done, and that he/she has examined the RFP and Specifications for the work and comments hereto attached. The Vendor proposes and agrees, if this submission is accepted, to contract with the City of Wildwood to furnish all necessary materials, equipment, labor and services necessary to complete the work covered by the RFP and Contract Documents for this Project. The Vendor agrees to accept in full compensation for each item the prices named in the schedules incorporated herein."



Signature

06-06-23
Date

2023-14
RFP Number

[☐] Check if exception(s) or deviation(s) to Specifications. Attach separate sheet(s) detailing reason and type for the exception or deviation.

This document must be completed and returned with your Submittal.

Statement of Terms and Conditions

PUBLIC ENTITY CRIME: A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal/Bid on a contract to provide any goods or services to a public entity, for the construction or repair of a public building or public work, may not submit Proposals/Bids on leases of real property to a public entity, may not be awarded or perform work as a Contractor, supplier, subContractor, or Contractor under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

INDEMNIFICATION: The contractor shall indemnify and hold harmless the City, and its officers and employees, from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorneys' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the design professional and other persons employed or utilized by the design professional in the performance of the contract.

PROHIBITION OF LOBBYING: During the blackout period which is, the period between the time the submittals for Invitation to Bid or the Request for Proposals, or Proposals, or Information, as applicable, are received at Contracts / Purchasing and the time the City awards the contract, no proposer, no lobbyist, principal, or other person may lobby, on behalf of a competing party in a particular procurement matter, any member of the City, or any City employee other than the . Violation of this provision may result in disapproval of violating party. All questions regarding this Request for Proposals (RFP) or Invitation to Bid (BID) must be submitted in writing to the City's Financial Services Manager.

ANTI TRUST LAWS: By submission of a signed RFP or BID, the successful Vendor acknowledges compliance with all antitrust laws of the United States and the State of Florida, in order to protect the public from restraint of trade, which illegally increases prices.

CONFLICT OF INTEREST: The award of the contract hereunder is subject to the provisions of Chapter 112 of the Florida Statutes. Vendors shall disclose the name of any Officer, Director, Partner, Associate, or Agent who is also an Officer, Appointee, or Employee of any of the City's at the time of the RFP or BID, or at the time of occurrence of the Conflict of Interest thereafter.

INTERPRETATION, CLARIFICATIONS AND ADDENDA: No oral interpretations will be made to any vendor as to the meaning of the RFP/BID Contract Documents. Any inquiry or request for interpretation received by the before the date listed herein will be given consideration. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, will be distributed at or after the Pre-Proposals/Pre-Bid Conference, mailed or sent by available or electronic means to all attending prospective Submitters prior to the established RFP/BID opening date. Each Vendor shall acknowledge receipt of such addenda in the space provided. In case any Proposer/Bidder fails to acknowledge receipt of such addenda or addendum, his offer will nevertheless be construed as though it had been received and acknowledged and the submission of his bid will constitute acknowledgment of the receipt of same. All addenda are a part of the RFP/BID FORMS and each Proposer/Bidder will be bound by such addenda, whether or not received by him. It is the responsibility of each proposer/bidder to verify that he has received all addenda issued before RFP's/BID's are opened. In the case of unit price items, the quantities of work to be done and materials to be furnished under this RFP/BID Contract are to be considered as approximate only and are to be used solely for the comparison of RFP's/BID's received. The City and/or his CONTRACTOR do not expressly or by implication represent that the actual quantities involved will correspond exactly therewith; nor shall the Vendor plead misunderstanding or deception because of such estimate or quantities of work performed or material furnished in accordance with the Specifications and/or Drawings and other Proposals/Bid Documents, and it is understood that the quantities may be increased or diminished as provided herein without in any way invalidating any of the unit or lump sum prices bid.

GOVERNING LAWS AND REGULATIONS: The vendor is required to be familiar with and shall be responsible for complying with all federal, state and local laws, ordinances, rules and regulations that in any manner affect the work.

PROPRIETARY/CONFIDENTIAL INFORMATION: Vendors are hereby notified that all information submitted as part of, or in support of RFP's/BID's, will be available for public inspection ten days after opening of the RFP's/BID's or until a short list is recommended whichever comes first, in compliance with Chapter 119, and 287 of the Florida Statutes. All RFP's/Bids submitted in response to this solicitation become the property of the City. Unless information submitted is proprietary, copy written, trademarked, or patented, the City reserves the right to utilize any or all information, ideas, conceptions, or portions of any RFP/BID, in its best interest.

TAXES: The City of Wildwood is exempt from any taxes imposed by the State and/or Federal Government. Exemption certificates will be provided upon request.

NON-COLLUSION DECLARATION: By signing this RFP/BID, all Vendors shall affirm that they shall not collude, conspire, connive or agree, directly or indirectly, with any other Proposer, vendor, or person to submit a collusive or sham Proposals in connection with the work for which their RFP/BID has been submitted; or to refrain from Bidding in connection with such work; or have in any manner, directly or indirectly, sought by person to fix the price or prices in the RFP/BID or of any other Bidder, or to fix any overhead, profit, or cost elements of the RFP/BID price or the RFP/BID price of any other Bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against any other Bidder, or any person interested in the proposed work.

PROPOSER RESPONSIBILITY: Invitation by the City's to vendors is based on the recipient's specific request or as the result of response by the public to the legal advertisements required by State law. Vendors or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.

CITYSHIP OF SUBMITTALS: All responses, inquiries or correspondence relating to or in reference to this RFP/BID, and all other reports, charts, displays, schedules, exhibits and other documentation submitted by the vendors will become the property of the City. Reference to literature submitted with a previous RFP/BID will not relieve the Bidder from including any required documents with this RFP/BID.

EXAMINATION OF BID DOCUMENTS: Each Bidder shall carefully examine the RFP/BID Document to ensure all pages have been received, all drawings and/or Specifications and other applicable documents are included, and shall inform himself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the CONTRACTOR will in no way relieve him of the obligations and responsibilities assumed under the Contract.

VENDOR RESPONSIBILITY: Vendors are fully and completely responsible for the labeling, identification and delivery of their submittals. The will not be responsible for any mislabeled or misdirected submissions, nor those handled by delivery persons, couriers, or the US Postal Service.

DRUG FREE WORKPLACE: All Proposers/Bidders shall submit the enclosed, duly signed and notarized form entitled "Drug Free Workplace Certificate". The Drug Free Workplace Vendor shall have the burden of demonstrating that his program complies with Section 287.087 of the Florida Statutes, and any other applicable state law.

THE CITY OF WILDWOOD, is a political subdivision of the State of Florida, and reserves the right to reject any and/or all submittals, reserve the right to waive any informalities or irregularities in the examination process, and reserve the right to award contracts and/or in the best interest of the City. Submittals not meeting stated minimum terms and proposals may be rejected by the City as non-responsive. The City reserves the right to reject any or all submittals without cause. The City reserves the right to reject the submission of any Vendor in arrears or in default upon any debt or contract to the City, or who has failed to perform faithfully any previous contract with the City's or with other governmental agencies.

PUBLIC RECORDS LAW: Correspondence, materials and documents received pursuant to this RFP/BID become public records subject to the provisions of Chapter 119, Florida Statutes.

VERIFICATION OF TIME: Next time is hereby established as the Official Time of the City's.

PREPARATION OF PROPOSALS/BIDS:

Signature of the Bidder: The Bidder must sign the RFP/BID FORMS in the space provided for the signature. If the Proposer/Bidder is an individual, the words "doing business as" must appear beneath such signature. In the case of a partnership, the signature of at least one of the partners must follow the vendor name and the words, "Member of the Vendor" should be written beneath such signature. If the Proposer/Bidder is a corporation, the title of the officer signing the RFP/BID on behalf of the corporation must be stated and evidence of his authority to sign the RFP/BID must be submitted. The Proposer/Bidder shall state in the RFP/BID FORMS the name and address of each person interested therein.

Basis for Bidding: The price proposed for each item shall be on a lump sum or unit price basis according to specifications on the RFP/BID FORM. The proposed prices shall remain unchanged for the duration of the Contract and no claims for cost escalation during the progress of the work will be considered, unless otherwise provided herein.

Total Proposed Price/Total Contract Sum Proposed: If applicable, the total price bid for the work shall be the aggregate of the lump sum prices proposed and/or unit prices multiplied by the appropriate estimated quantities for the individual items and shall be stated in figures in the appropriate place on the RFP/BID FORM. In the event that there is a discrepancy on the RFP/BID FORM due to unit price extensions or additions, the corrected extensions and additions shall be used to determine the project bid amount.

TABULATION: Those wishing to receive an official tabulation of the results of the opening of this RFP/BID are to submit a self-addressed, stamped business size (No. 10) envelope, prominently marked on the front lower left side, with the RFP identification. Tabulation requested by telephone, fax or electronic media will not be accepted.

OBLIGATION OF WINNING BIDDER: The contents of the RFP/BID of the successful proposer/bidder will become contractual obligations if acquisition action ensues. Failure of the successful Proposer/Bidder to accept these obligations in a contract may result in cancellation of the award and such vendor may be removed from future participation.

AWARD OF BID: It is the City's intent to select a vendor within sixty (60) calendar days of the deadline for receipt of Proposals/Bids. However, Proposals/Bids must be vendor and valid for award for at least ninety (90) calendar days after the deadline for receipt of the RFP/BID.

ADDITIONAL REQUIREMENTS: The vendors shall furnish such additional information as the City may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The City reserves the right to make investigations of the proposals of the vendor as it deems appropriate.

PREPARATION COSTS: The City shall not be obligated or be liable for any costs incurred by Proposers/Bidders prior to issuance of a contract. All costs to prepare and submit a response to this RFP/BID shall be borne by the Proposer/Bidder.

TIMELINESS: All work will commence upon authorization from the City's representative. All work will proceed in a timely manner without delays. The Contractor shall commence the work UPON RECEIPT OF NOTICE TO PROCEED and/or ORDER PLACED (PURCHASE ORDER PRESENTED), and shall deliver in accordance to the terms and conditions outlined and agreed upon herein.

DELIVERY: All prices shall be FOB Destination, Sumter County, Florida, inside delivery unless otherwise specified.

ADDITIONAL SERVICES/PURCHASES BY OTHER PUBLIC AGENCIES ("PIGGY-BACK"):

The Vendor by submitting a Bid acknowledges that other Public Agencies may seek to "Piggy-Back" under the same terms and conditions, during the effective period of any resulting contract - services and/or purchases being offered in this Bid, for the same prices and/or terms proposed. Vendor has the option to agree or disagree to allow contract Piggy-Backs on a case-by-case basis. Before a Public Agency is allowed to Piggy-Back any contract, the Agency must first obtain the vendor's approval - without the vendor's approval, the seeking Agency cannot Piggy-Back.

PLANS, FORMS & SPECIFICATIONS: Bid Packages are available from the . These packages are available for pickup or by mail. If requested to mail, the Proposer/Bidder must supply a courier account number (UPS, FedEx, etc.). Proposers/Bidders are required to use the official RFP/BID FORMS, and all attachments itemized herein, are to be submitted as a single document. Any variation from the minimum specifications must be clearly stated on the RFP/BID FORM and/or Exceptions/Deviations Sheet(s). Only one set of plans, forms, and specifications will be furnished each company or corporation interested in submitting a Proposals/bid. RFP/BID FORM documents for this project are free of charge and are available on-line and are downloadable.

MANUFACTURER'S NAME AND APPROVED EQUIVALENTS: Any manufacturer's names, trade names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition unless otherwise indicated. The Proposer/Bidder may offer any brand for which he is an authorized representative, which meets or exceeds the RFP/BID specification for any item(s). If RFP's/BID's are based on equivalent products, indicate on the RFP/BID FORM the manufacturer's product name and literature, and/or complete specifications. Reference to literature submitted with a previous RFP/BID will not satisfy this provision. The Proposer/Bidder shall explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. RFP's/BID's which do not comply with these requirements are subject to rejection. RFP's/BID's lacking any written indication of intent to quote an alternate brand will be received and considered in complete compliance with the specifications as listed on the RFP/BID FORM. The is to be notified, in writing, of any proposed changes in materials used, manufacturing process, or construction. However, changes shall not be binding upon the City unless evidenced by a Change Notice issued and signed by the , or designated representative.

QUANTITIES: The quantities as specified in this RFP/BID are estimates only and are not to be construed as guaranteed minimums.

SAMPLES: Samples of items, when called for, shall be furnished free of expense, and if not destroyed may, upon request, be returned at the Proposer's/Bidder's expense. Each sample shall be labeled with the Proposer's/Bidder's name, manufacturer brand name and number, RFP/BID number and item reference. Samples of successful Proposer's/Bidder's items may remain on file for the term of the contract. Request for return of samples shall be accompanied by instructions which include shipping authorization and must be received at time of opening. Samples not returned may be disposed of by the City within a reasonable time as deemed appropriate.

DOCUMENT RE-CREATION: Vendor may choose to re-create any document(s) required for this solicitation, but must do so at his own risk. All required information in the original City format must be included in any re-created document. Submittals may be deemed non-responsive if required information is not included in any re-created document.

ACKNOWLEDGED:

This document must be completed and returned with your Submittal.

(Signature and Date)

HOLD HARMLESS AGREEMENT

The Contractor agrees to hold the City of Wildwood harmless against all claims for bodily injury, sickness, disease, death or personal injury or damage to property or loss of use resulting there from, arising out of the agreement, to the extent that such claims are attributable, in whole or in part, to a negligent act or omission by the Contractor.

The Contractor shall purchase and maintain workers' compensation insurance for all workers' compensation insurance and employers' liability in accordance with Florida Statute Chapter 440.

The Contractor shall also purchase any other coverage required by law for the benefit of employees.

Required insurance shall be documented in Certificates of Insurance and shall be provided to the City representative requesting the service.

By signature upon this form the Contractor stipulates that he/she agrees to the Hold Harmless Agreement, and to abide by all insurance requirements.

Base 3, LLC dba Gibson Electric
Contractor/ Vendor-Print Name


Signature

Request for Proposal for Electrical Services
Project Name

06/06/2023
Date

The effective date of this Hold Harmless Agreement shall be for the duration of this project.

This document must be completed and returned with your Submittal.

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that,

Base 3, LLC dba Gibson Electric
(print or type name of vendor)

- Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
- Informs employees about the dangers of drug abuse in the work place, the vendor's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
- Gives each employee engaged in providing commodities or contractual services that are under RFP or bid, a copy of the statement specified above.
- Notifies the employees that as a condition of working on the commodities or contractual services that are under RFP or bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, please or guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
- Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.
- "As a person authorized to sign this statement, I certify that the above named business, vendor or corporation complies fully with the requirements set forth herein".



Authorized Signature

06/06/2023

Date Signed

State of: Florida

County of: Marion

Sworn to and subscribed before me this 16th day of June, 20 23

Personally known x or Produced Identification NA

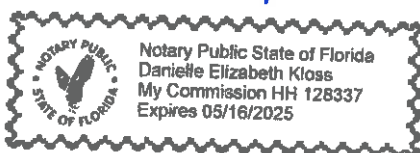
(Specify Type of Identification)



Signature of Notary

My Commission Expires 5/10/25

(seal)



This document must be completed and returned with your Submittal.

**SWORN STATEMENT TO SECTION 287.133(3)(a),
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES FORM**
THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR
OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to City of Wildwood

By Larry (Al) Booth, Jr., COO/CFO

{print individual's name and title}

for Base 3, LLC dba Gibson Electric

{print name of entity submitting sworn statement}

whose business address is 2695 NW 4th Street, Ocala, FL 34475

and (if applicable) its Federal Employer Identification Number (FEIN) is 20-0953712 (If the
entity has no FEIN, include the Social Security Number of the individual signing this sworn
statement: _____.)

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), **Florida Statutes**, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), **Florida Statutes**, means a finding of guilt or a conviction of a public entity crime, with or without adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), **Florida Statutes**, means:
- a. A predecessor or successor of a person convicted of a public entity crime; or
 - b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
 - c. I understand that a "person" as defined in Paragraph 287.133(1)(e), **Florida Statutes**, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
 - d. Based on information and belief, the statement which I have marked below is true in relation to the

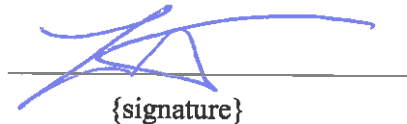
entity submitting this sworn statement. {indicate which statement applies.}

X Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. {attach a copy of the final order}

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

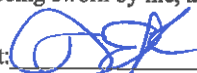

{signature}

06/06/2023
{date}

State of Florida

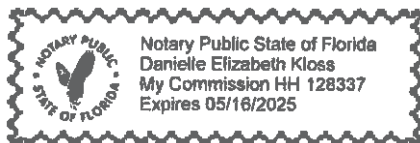
County of Marion

PERSONALLY APPEARED BEFORE ME, the undersigned authority, Larry A. Booth Jr., who after first being sworn by me, affixed his/her signature in the space provided above on this 6th day of June, 2023

Attest: 
Notary Public

My commission expires: 5/16/25

(Notary Seal)



This document must be completed and returned with your Submittal.

Conflict of Interest Disclosure Form

I HEREBY CERTIFY that

2. I (printed name) Larry (Al) Booth, Jr. am the
(title) COO/CFO and the duly authorized representative of the vendor of (Vendor
Name) Base 3, LLC dba Gibson Electric whose address is
2695 NW 4th Street, Ocala, FL 34475, and
that I possess the legal authority to make this affidavit on behalf of myself and the vendor for which I am acting;
and,

2. Except as listed below, no employee, officer, or agent of the vendor have any conflicts of interest, real or apparent,
due to ownership, other clients, contracts, or interests associated with this project; and,

3. This bid proposal is made without prior understanding, agreement, or connection with any corporation, vendor, or
person submitting a bid proposal for the same services and is in all respects fair and without collusion or fraud.

EXCEPTIONS (List)

Signature: _____

Printed Name: Larry (Al) Booth, Jr.

Vendor Name: Base 3, LLC dba Gibson Electric

Date: 06/06/2023

State of Florida

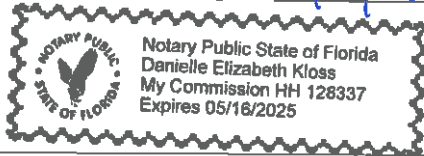
County of Marion

Sworn to and subscribed before me this 6th day of June 20 23

Personally Known X

OR Produced Identification NA, Type of Identification NA

My Commission Expires 5/16/25



(Printed, typed or stamped commissioned name of notary)

This document must be completed and returned with your Submittal

Immigration Affidavit Certification

This Affidavit is required and should be signed, notarized by an authorized principal of the firm, and submitted with formal Invitations to Bid (ITB's) and Request for Proposals (RFP) submittals. Further, Consultants / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment, at the time of the submission of the Consultant's/bidder's proposal. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company. Failure to include this Affidavit and acceptable evidence of enrollment in the E-Verify program may deem the Consultant / Bidder's proposal as nonresponsive.

The City of Wildwood will not intentionally award City contracts to any Consultant who knowingly employs unauthorized alien workers, constituting a violation of the employment provision contained in 8 U.S.C. Section 1324 a(e) Section 274A(e) of the Immigration and Nationality Act ("INA").

The City of Wildwood may consider the employment by any Consultant of unauthorized aliens a violation of Section 274A (e) of the INA. Such Violation by the recipient of the Employment Provisions contained in Section 274A (e) of the INA shall be grounds for unilateral termination of the contract by the City of Wildwood.

Consultant attests that they are fully compliant with all applicable immigration laws (specifically to the 1986 Immigration Act and subsequent Amendment(s)) and agrees to comply with the provisions of the Memorandum of Understanding with E-Verify and to provide proof of enrollment in The Employment Eligibility Verification System (E-Verify), operated by the Department of Homeland Security in partnership with the Social Security Administration at the time of submission of the Consultant's / Bidder's proposal.

Company Name: Base 3, LLC dba Gibson Electric

Print Name: Larry (Al) Booth, Jr Title: COO/CFO

Signature [Signature] Date: 06/06/2023

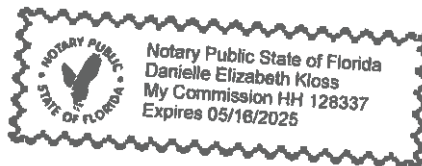
State of Florida County of Marion

The foregoing instrument was signed and acknowledged before me this 6th day of June, 2023, by

Larry A. Booth Jr who has produced NA personally known as identification.
(Print or Type Name) (Type of Identification and Number)

Notary Public Signature

Danielle Kloss
Printed Name of Notary Public



HH128337
Notary Commission Number/Expiration

The signee of this affidavit guarantees, as evidenced by the affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

6/7/2023

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
Wallace Welch & Willingham, Inc.
300 1st Ave S, 5th Floor
St. Petersburg FL 33701

CONTACT
NAME:
PHONE
[A/C. No. Ext]: 727-522-7777 FAX
[A/C. No]: 727-521-2902
E-MAIL
ADDRESS: certificates@w3ins.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Zurich American Ins. Co.	16535
INSURER B : American Guarantee & Liability Ins. Co.	26247
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED
Base 3, LLC dba Gibson Electric
2695 NW 4th St
Ocala FL 34475

FACIPER-01

COVERAGES

CERTIFICATE NUMBER: 1291745304

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	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☒ PRO-JECT ☐ LOC OTHER:			GLO047105001	5/22/2022	6/22/2023	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 \$
A	☒ AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY			BAP047105101	5/22/2022	6/22/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ 100,000 BODILY INJURY (Per accident) \$ 300,000 PROPERTY DAMAGE (Per accident) \$ 50,000 PIP \$ 10,000
B	☐ UMBRELLA LIAB ☒ OCCUR ☒ EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☒ RETENTION \$ 0			SXS975636601	5/22/2022	6/22/2023	EACH OCCURRENCE \$ 3,000,000 AGGREGATE \$ 3,000,000 \$
	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				PER STATUTE ☐ OTH-ER ☐ E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

For Information Purposes Only

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

© 1988-2015 ACORD CORPORATION. All rights reserved.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/07/2023

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 Brown & Brown of Florida, Inc. 1720 SE 16th Avenue, Suite 301 Ocala FL 34471		CONTACT NAME: Robin Simmons PHONE (A/C, No, Ext): (352) 732-5010 FAX (A/C, No): (352) 732-5344 E-MAIL ADDRESS: Robin.Simmons@bbrown.com	
		INSURER(S) AFFORDING COVERAGE INSURER A: FFVA Mutual Insurance Co.	NAIC # 10385
INSURED Base 3 LLC dba Gibson Electric 2695 NW 4th Street Ocala FL 34475		INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	

COVERAGES**CERTIFICATE NUMBER:** Base 3 LLC**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
	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE DED ☐ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	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	N/A	WC84000356792023A	05/22/2023	05/22/2024	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

for bidding purposes

CERTIFICATE HOLDER**CANCELLATION**Base 3 LLC dba Gibson Electric
2695 NW 4th St

Ocala

FL 34475

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

© 1988-2015 ACORD CORPORATION. All rights reserved.

RFP COVER PAGE

Name of Vendor, Entity or Organization:

Accurate Power and Technology, Inc / DBA-A Generator Guy

Federal Employer Identification Number (FEIN):20-2663060

State of Florida License Number (If Applicable):EC13007737

Name of Contact Person: Sonny J Dukes

Title: President

E-Mail Address: sonny@accuratepowerandtechnology.com

Mailing Address: 15519 US Highway 441 Suite A101

Street Address (if different):

City, State, Zip: Eustis, FL 32726

Telephone: 352.735.8285

Fax:352.609.5165

Organizational Structure – Please Check One:

Corporation ☒ Partnership ☐ Proprietorship ☐ Joint Venture ☐ Other ☐

If Corporation:

Date of Incorporation: 4/19/05 **Name Change** 3/20/15 **State of Incorporation:** FL

States Registered in as Foreign Corporation:

Authorized Signature:

Print Name: Sonny J Dukes

Signature:

Title: _President_

Phone:

352.735.8285

This document must be completed and returned with your Submittal.

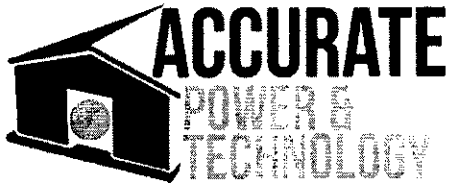


REQUEST FOR PROPOSAL for ELECTRICAL SERVICES

RFP # 2023-14

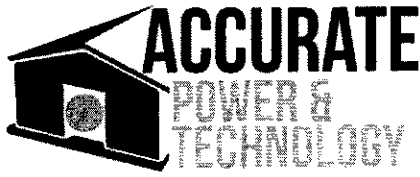
**City of Wildwood
100 N Main Street
Wildwood, FL 34785**

**352-330-1343 (Phone)
352-330-1353 (Fax)**



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

TAB A



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

Accurate Power and Technology, Inc is a State Certified Electrical Contractor (EC13007737) that specializes in Back Up Power and Commercial Electric. It is our intent to contract with City of Wildwood, FL for electrical contract services.

We understand the scope defined as to provide electrical services for both maintenance and emergency. All work to be completed with the upmost quality and in a timely manner consciously and having the Counties best interest in mind.

Accurate Power currently holds "Brick and Mortar" in Central Florida (Eustis) West Coast of Florida (Sarasota) and East Coast of Florida (Vero Beach)

1. **Eustis – 15519 West US Highway 441 Suite A101 Eustis, FL 32726 (352.735.8285)**
2. **Sarasota – 6341 Porter Road Unit 8 Sarasota, FL 34240 (941.867.6580)**
3. **Vero Beach – 934 36th Court SW Vero Beach, FL 32968 (772.617.2072)**

Below is a list of Employees and procedure:

1. Sonny J Dukes, President 407.280.7904
2. Jack Phillips, EC Qualifier 727.858.0687
3. Chris Romano, Installation Manager 352.735.8285
4. Haley Bogart AR/AP 352.735.8285
5. Paul Schumacher, Service Manager and Certified Industrial Technician 352.735.8285
6. Brian Eakin, Operations Manager and Certified Industrial Technician 352.735.8285
7. Chris Ethridge, Lead Electrical 352.735.8285
8. David Hayden, Parts, Warranty and Quoting 352.801.9157
9. Fount Hansen – Lead Industrial Technician 352.408.6935
10. On-Call 352.735.8285 (prompts)

We are currently staffed to complete 9 million in Revenue annually. **Our service department supports some large clients to date such as City of Eustis, Mt Dora, Pinellas County Schools, City of Altamonte Spring, Florida Keys and Department of Transportation. We also support several "Life Safety" Clients such as nursing**

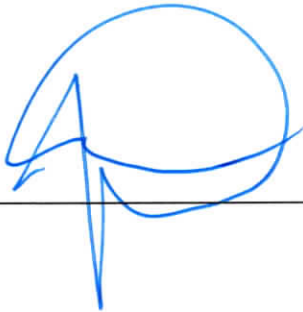
homes and assisted living facilities. All 24 of our Vehicles are 2018/2019/20 and are either owned by us or Enterprise Fleet. **All (Uniformed)Technicians hold Jessica Lunsford certification.**

All contents of this proposal are true and accurate and all requirements so the Bid Proposal can be met, including, but not limited to, insurance, bonding, and licensing.

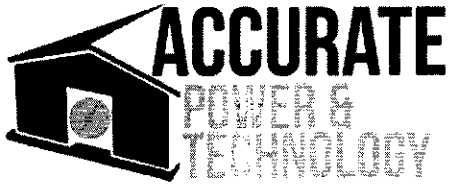
MISSION STATEMENT AND CORE VALUES

Accurate Power and technology provide the best possible cutting-edge backup power product for any budget. We focus on the best value and service across every client we serve.

1. We believe our employees come first and we respect our suppliers.
2. We stay involved in our community and are dedicated to our chosen organizations to help less fortunate.
3. We have passion for execution.
4. We will be experience focused rather than price.
5. We will strive to achieve 100% customer satisfaction.



_____, President 5/11/2023



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

TAB B

FORM 1

VENDOR PROFILE

Submitted by (*Company Name*): Accurate Power and Technology, Inc / DBA-A Generator Guy

Corporation ☒ **Partnership** ☐ **Individual** ☐ **Joint Venture** ☐

Other ☐ Describe:

Florida Electrical Contractor License Number: EC13007734 Expiration Date: August 31, 2024

Office Location: 15519 US Highway 441 Suite a101 Eustis, FL 32726

Number of people in your organization: 48

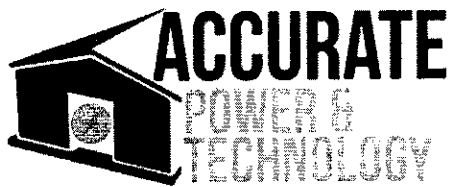
Length of time the Contractor has been doing business under this name in Florida: 8 years

Length of time your firm has provided electrical services to governmental clients: 8 years

Under what other name(s) has your firm operated: Was Started in 2005 as Storm Stoppers and underwent a name change in 2015 to Accurate Power

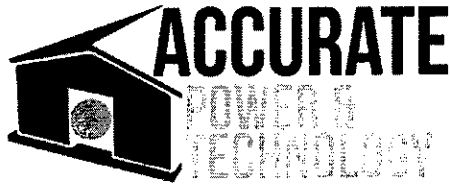
Has or is your firm currently involved in any formal court proceedings regarding any of your electrical contracts?

YES ☐ (*attach a detailed explanation*) NO ☒



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

TAB C



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

Team Qualifications

Accurate Power and Technology, Inc is a State Certified Electrical Contractor that specializes in Back Up Power and Commercial Electrical Service. Our Mission Statement and Core Values will explain our required commitment to customer satisfaction and businesslike concerns for our clients.

We take pride in hiring the best Technicians around to ensure we provide the and expertise the best experience possible with our builds.

Below is a list of Employees and procedure:

1. **Sonny J Dukes**, President 407.280.7904
2. **Jack Phillips**, EC Qualifier 727.858.0687
3. **Haley Bogart**, AR/AP 352.735.8285
4. **Amanda Armento**, Office Manager and Accounting 352.735.8285
5. **Brian Eakin**, Operations Manager – 352.735.8285 Brian holds many years as an industrial Service Technician. He is not only the operations Manager, but he is also Technical.
6. **Paul Schumacher**, Service Manager and Certified Industrial Technician with over 20 years of Service as an Industrial Technician. Paul is also a Marine and has served our country. He provides structure to the service team and is technical. 352.735.8285
7. **David Kornstadt** – Commercial PM. David has experience of managing any project large or small with efficiency. David knows the Critical Patch and how to complete a project on time and within budget.
8. **Chris Ethridge** – Lead Engineering and Senior Electrician. Chris has the experience to provide Commercial installations focusing on Quality and best outcome for each situation. There isn't much Chris hasn't seen and he is an extremely focused individual.
9. **David Hayden**, Parts David has the knowledge and contacts to obtain the best products and pricing. David is a great team player and works well with the staff.

10. **Kim Slotnick** – Commercial Permitting. She has been with Accurate Power for a long time and knows the ins and outs with most municipalities.

We are currently staffed to complete 9 million in Revenue annually. **Our service department supports some large clients to date such as the City of Eustis, Mt Dora, Lake County, and Department of Transportation. We also support several “Life Safety” Clients such as nursing homes and assisted living facilities.** All 30 of our Vehicles are 2020-2022 and are either owned by us or Enterprise Fleet. Our Company was started in 2005 and has over 3500 Residential, Commercial, and Industrial Clients.

Accurate Power and Technology, Inc Currently employees 41 individuals from Permit Technicians, Service Technicians to Electrical Installation Technicians.

Accurate Power and Technology resides in Eustis, FL housing around 5000sq/ft of rented space. We also own free and clear an acre of property in Mt Dora located on 441 where we intend to build future office. Both are secure and house cameras.

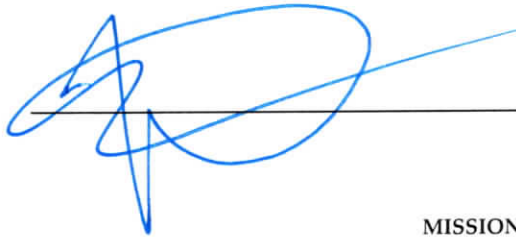
Accurate Power also holds Brick and Mortar in Vero Beach and Sarasota

Accurate Power and Technology can accommodate walk-ins and scheduled appointments. We can usually respond to appointment requests and accommodate most any time and date during normal day and times.

When emergencies arise Accurate Power and Technology will ensure The School District is given priority for repair and call outs.

Our Uniformed techs are completely qualified and have the tools on hand to complete most of the work that would be needed. EX..

All contents of this proposal are true and accurate.



_____, President 5/11/2023

MISSION STATEMENT AND CORE VALUES

Accurate Power and technology provide the best possible cutting-edge backup power product for any budget. We focus on the best value and service across every client we serve.

1. We believe our employees come first and we respect our suppliers.
2. We stay involved in our community and are dedicated to our chosen organizations to help less fortunate.
3. We have passion for execution.
4. We will be experience focused rather than price.
5. We will strive to achieve 100% customer satisfaction.

BRIAN L. EAKIN
 (443) 506-8855
beakin443@gmail.com

PROFESSIONAL PROFILE

I am a client-focused, highly resourceful professional, who enjoys possessing over 2 decades of work experience as a qualified technician, in electronics, industrial mechanics, project management, in-house and within the field. I am a team player and leader who works well with all personality types and cultures. I often exceed the expectation of my managers by going above and beyond the call of duty to do the best job possible to make both manager and clients very satisfied. I duplicate my skills and efforts by training others to perform well in their jobs and to provide coverage when needed.

PROFESSIONAL SKILLS

Excellent Communicator	Schematics and Multi-meters	Project Manager
Trainer	Mechanic and Service Technician	Affiliate Sales Professional
Well-Organized	Repair Cranes	Account Management
Dedicated	Test, Detect, Repair Install Generators	Analyst
Trustworthy and Committed	Industrial and Residential Generators	Superb Problem-Solving Skills
Meticulous	Work with Wiring Diagrams	Company Ambassador
Prompt and Timely	Safety Manager and Electrical Work	Word - Excel - Outlook - PowerPoint
Loyal to Work Ethics	Plumbing and Home Remodeling	Microsoft Windows / Apple Platform

EDUCATION AND VOLUNTEER WORK

Pennsylvania College of Technology Associate of Applied Science Williamsport, Pennsylvania Graduated 1999	Maryland Fire and Rescue Institute Various Certificates for Fire Fighter Classes College Park, Maryland Ongoing Training
Volunteer Fire Fighter, FADO Bowley's Quarters, Maryland 2000 - Present	Lieutenant, Chief Engineer, Operator and Fire Prevention Educator Ongoing

PROFESSIONAL DEVELOPMENT AND CERTIFICATIONS

Kohler Communications	March 2019
Kohler Dec 6000 Paralleling Systems	March 2019
Current Commercial Driver License Class A	2011 - Present
Kohler Industrial Generator Certification	2016
Fire Training:	
NBFSPQ Firefighter I, II, Hazmat Awareness & Operations, MIEMSS Emergency Medical Technician	
Basic, NBFSPQ Fire Officer, Rescue Technician.	2001-2008
Electronics Certifications and Specialized Training:	
Electronic Control Modules, Vehicle Chassis Electronics and Diagnostics, Engine Management Systems, HEUI (Hydraulically Actuated Electronically Controlled Unit Injector), EMCP (Electronic Modular Control Panel), SMCS (Service Management Control Systems), SMART (Software Management and Release Tracking Systems).	2000 - 2004

PROFESSIONAL WORK EXPERIENCE

Senior Industrial Generator Technician
Premium Power - Kennett Square, Pennsylvania
2018 - 2021



- Manage and oversee direct customer contracts.
- Demonstrate exemplary ability to troubleshoot/repair burnt-out wiring and generator hardware.
- Commission generator at customer locations, including automatic transfer switch and switch gear.
- Provide electrical and acceptance testing on switchgear, breakers, relays, transformers and substations.
- Provide Quarterly, annual, bi-annual, tri-annual inspections on numerous makes and models of stand-by emergency generators in high profile businesses and secured government sites.
- After inspections, if needed, provide on-site repairs as well as functional and shutdown procedures, generator transfer, load checks, load bank testing, and transfer switch checks.
- Provide generator repair on all makes/models using manufacturer-provided diagnostic software.
- Provide software and hardware updates to customer equipment, according to the manufacturer recommendations as needed.
- Conduct load tests on low and medium voltage generators from 15kw to 2.5meg.
- Troubleshoot units using wiring diagrams, schematics, and multimeters.
- Focus on the mechanical and electrical aspects of Engine/Generator package.
- Promote the highest possible degree of quality, safety, customer satisfaction and teamwork.
- Provide service call response and assignments for generator systems.

Assistant Manager and Service Technician
Power Plus - Baltimore, Maryland
2012 - 2018



- Kohler Industrial Certified Technician
- Serviced, tested, diagnosed, repaired, and installed industrial generators in North East Region.
- Maintained professional appearance and performance of company service vehicles.
- Educated co-workers about all important DOT standards.
- Completed factory training on generators.
- Managed inventory and employees as well as trained employees.
- Professionally communicated with customers and third-party companies.

Safety Manager and Service Technician
Curtis Engine - Baltimore, Maryland
2011 - 2012



- Serviced, tested, diagnosed, repaired, and installed industrial /residential generators in DELMARVA.
- Communicated and educated customers and employees about safety and mechanics of each job.
- Maintained professional appearance and performance of company service vehicles.

PROFESSIONAL WORK EXPERIENCE - (CONTINUED)

Mechanic

Rain for Rent - Baltimore, Maryland
2009 - 2011



- ✦ Specified, installed, tested, diagnosed, maintained, and documented pumps, generators and other equipment in government, businesses and residential settings throughout DC, MD, VA, and WV.
- ✦ Communicated and educated customers and employees regarding safety and mechanics of each job.
- ✦ Maintained professional appearance and serviceability of company service vehicles.

Project Manager - Field Service

Zenmar Pneumatic Tools, Inc. - Cockeysville, Maryland
2008 - 2009



Quoted, installed, troubleshooted and repaired cranes, hoists, winches, and tools (air, electric and hydraulic).

Caterpillar Service Technician / Generator Installer

Innovative Energy Systems - Baltimore, Maryland
2007 - 2008



- ✦ Adhered to county electrical and building codes for proper installations.
- ✦ Installed and troubleshooted generator systems, including transfer switch failures and remote starting.
- ✦ Fitted, tested, and adjusted natural and propane pipes.
- ✦ Safely worked through miscellaneous residential electrical challenges.

REFERENCES AVAILABLE UPON REQUEST

Paul Schumacher

991 SE Belfast Ave, Port Saint Lucie Florida 34983

Phone 772-233-8010

pshoes9855@icloud.com

pauls@accuratepowerandtechnology.com

Professional Profile

• Mobile Air Conditioning	CFC-12 Refrigerant Recycling	09/1993
• Caterpillar, Gregory Poole	3500 Basic Class	04/1994
• Caterpillar, Gregory Poole	Basic Fuel & Systems	04/1994
• Caterpillar, Gregory Poole	3114/3116 Engines	09/1994
• Caterpillar, Gregory Poole	Diesel Engine Diagnostics	09/1994
• Caterpillar, Carter Machinery	Woodward Engine Controls	10/1994
• Caterpillar, Gregory Poole	Failure Analysis I	12/1994
• Caterpillar, Gregory Poole	Lift Truck Operator	08/1996
• Caterpillar, Gregory Poole	Applied Failure Analysis II	06/1997
• Caterpillar, Gregory Poole	Mechanical & Electrical Gov Theory	08/1997
• Caterpillar, Gregory Poole	EPG II	09/1997
• Aggreko LLC	Twin Pac, Generator Parrelling	02/1998
• ESCO Institute	Universal Refrigerant License	12/1999
• Aggreko LLC	Basic Air Conditioning	02/2000
• Aggreko LLC	IR Electric Air Compressor	01/2002
• Aggreko LLC	Generator Specialty, Parrelling	03/2003
• Aggreko LLC	Premier Air Compressor	05/2003
• Power Pro Tech	Progress Safety Class	
• Power Pro Tech	Hazmat communication Class	06/2010
• Power Pro Tech	Fall Prevention	
• Power Pro Tech	Lock Out Tag Out Certificate	08/2010
• Lake Shore Electric	Repair & Maintenance of ATS	07/2008

Professional Experience

Accurate Power and Technology
May 2020 to Present
Operations Manager

Achievements:

- Opened a satellite office in Vero Beach FL, supervise sale, Permit process, & install of generators.
- Verify customer satisfaction after each install.
- Interview, Hire, & Train new employees to proficiently.
- Schedule, & supervise maintenance on all maintenance contracts.

Responsibilities:

- **[Sales]**
 - Communicate to customers what is needed for their generator install.
 - Perform estimation for generator repairs.
- **[Customer Service]**
 - Coordinate with employees to meet all customers needs with Installs, maintenance &/or repairs.
 - Verify that all work is completed in a proficient manner.
- **[Pre-Site Survey]**
 - Coordinate with customers, perform a walk thru to inspect for any obstacles.
 - To verify that all needs are met & present all options to perform the install, repairs &/or maintenance.
- **[Post-Site Survey]**
 - Verify that all customers' expectations were met.

Power Secure / Power Pro Tech Services, Stuart FL

May 2008 to May 2020

Field Engineer

Achievements:

- Coordinate generator maintenance & repair to be completed in a timely fashion.
- Training less experienced technicians in engine & ATS repairs.
- Interview, Hire, & Train new employees to proficient technicians.
- Spent three years in Knoxville TN until Power Secure built the technician force needed for the area. Covering five states providing generator maintenance.

Responsibilities:

- **[Sales]**
 - Communicate to customers what repairs are need and the reason for these repairs
 - Send PPT estimation team, needed parts, tooling, & time to complete repairs so a estimation can be created
- **[Customer Service]**
 - Coordinate with customers all maintenance &/or repairs.
 - Complete all work in a proficient manner.
- **[Pre-Site Survey]**
 - Coordinate with customers, perform a walk thru to inspect for any obstacles.
 - To verify that all parts are correct & present to perform the repairs &/or maintenance.
- **[Post-Site Survey]**
 - Verify that all customers' expectations were met.

Emergency Power Systems, Tulsa OK

Dec 2007 to May 2008

Senior Generator Tech

Achievements:

- Installed generators, Transfer switches, & enunciator panels. Hooked up fuel lines whether diesel, natural gas, or propane.
- Reconditioned two 1250 KW generators (Cat 3512's) that were sitting in a warehouse for several years.
- Proficient at multi tasking several jobs, & customers' needs.

Responsibilities:

- **[Sales]**
 - Communicate to customers what repairs are need and the reason for these repairs. Provide quotes for when requested.
- **[Customer Service]**
 - To maintain a positive work environment for customer & technicians. Answer any questions, Ask questions & explain the order of work to be performed.
 - Complete all work in a proficient manner.
- **[Pre-Site Survey]**

- Coordinate with customers, perform a walk thru to inspect for any obstacles.
- To verify that all parts are correct & present to perform the repairs &/or maintenance.
- **[Ordering Parts]**
 - Visually inspect customer's equipment, & create a photo data base of customer's equipment.
- **[Post-Site Survey]**
 - Verify that all customers' expectations were met.

Power Plus Generator Service LLC, Hope Mills NC
Aug 1998 to Dec 2007
CEO

Achievements:

- Operated business for nine years.
- Trained employees to meet Power Plus's ability to resolve all customers' emergency generator requirements.
- Proficient at multi tasking several jobs, & customers' needs.

Responsibilities:

- **[Customer Service]**
 - To maintain a positive work environment for customer & technicians. Answer any questions, Ask questions & explain the order of work to be performed.
 - Complete all work in a proficient manner.
- **[Pre-Site Survey]**
 - Coordinate with customers, perform a walk thru to inspect for any obstacles.
 - To verify that all parts are correct & present to perform the repairs &/or maintenance.
- **[Equipment Set-up]**
 - With customer's assistance, engineered placement of equipment so it has the least amount of obstruction to the customers daily work environment. Hooked up all equipment, tested equipment, & trained customers on operation of equipment. Explained emergency shutdown procedures, & verified that customer has contact information in case of unforeseen problems.

- **[Equipment Maintenance & Repair]**
 - Performed on site preventive maintenance & repairs on generators.

Aggreko LLC. Fayetteville NC

Jan 1998 to Jan 2003

Field Engineer

Achievements:

- Attended class on air compressors, industrial air conditioner & chillers. Aquired universal refrigerant licience.
- Trained employees on generators to meet Aggreko's generator requirements.
- Proficient at multi tasking several jobs, & customers' needs.

Responsibilities:

- **[Customer Service]**
 - To maintain a positive work environment for customer shutdowns. Answer and asked questions to determine the order of work to be performed.
 - Complete all work in a proficient manner.
- **[Pre-Site Survey]**
 - Coordinate with customers, perform a walk thru to inspect for any obstacles.
- **[Equipment Set-up]**
 - With customer's assistance, engineered placement of equipment so it has the least amount of obstruction to the customers daily work environment. Hooked up all equipment, tested equipment,, & trained customers on operation of equipment. Explained emergency shutdown procedures, & verified that customer has contact information in case of unforeseen problems.
- **[Equipment Maintenance & Repair]**
 - Performed maintenance & repairs on generators, air compressors, & air conditioners. At the shop I performed level I testing on equipment to get ready to re rent.

Caterpillar, Gregory Poole, Raleigh NC

Apr 1994 to Jan 1998

Power Generator Tech

Achievements:

- Became proficient on caterpillar engine rebuilds.
- Learned to trouble shoot & repair several transfer switches Russ electric, Westinghouse, Cutler hammer, & ASCO.
- Maintained an \$80,000 inventory on my truck.

Responsibilities:

- **[Customer Service]**
 - To maintain a positive work environment for customer & technicians. Answer any questions, Ask questions & explain the order of work to be performed.
 - Complete all work in a proficient manner.
- **[Regional Technician]**
 - Worked out of my home in Fayetteville NC. The Raleigh office would fax me work orders.
 - I would order parts for the work described in the work orders.
 - The parts were then shipped to my house & I would coordinate with the customer on the repair.
 - When work was completed I would fax to the Raleigh office the service report & time sheet for invoicing.
- **[On Call]**
 - A regional tech was on call 24/7/365. Customers could call me at home, cell, &/or pager.
- **[Equipment Maintenance & Repair]**
 - Performed on site generator maintenance & repairs.

Goodyear Tire & Rubber Company, Cleveland OH

May 1992 to Jan 1998

Automotive Technician

Achievements:

- Became proficient on alignments.
- Learned to inspect, repair, & replace suspension systems.

Responsibilities:

- **[Customer Service]**
 - Performed engine maintenance & repairs on all makes & models of automobiles, repairs on brakes system, air conditioning, alignments, tires, & emission testing.

Schneider National Inc. Green bay WI

Dec 1989 to Mar 1992

Truck Driver

Achievements:

- Picked up & delivered freight in all 48 states & Canada.
- Became proficient on clearing Canadian & USA Customs
- Maintained a clean & professional appearance of my truck & self.
- Freight arrived on time & undamaged.

Responsibilities:

- Maintained a currant & up to date, daily log, mileage record, & bill of ladings

Perry's Ice-cream Company, Akron NY

Apr 1989 to Sep 1989

Production Set-up

Responsibilities:

- Set up ice-cream containers, Ingredients for the assembly line operators.

United State Marine Corps, Jacksonville NC

Dec 1984 to Mar 1989

Rank: Corporal

Discharge: Honorable

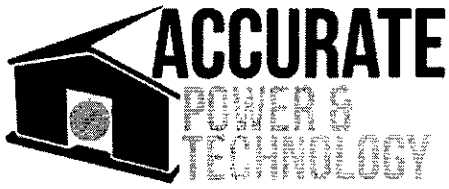
Reserve Status: Inactive

Education

Ohio Auto/Diesel Technical Institute, Cleveland OH

Course: Diesel & Automotive Technology
Graduation: Jan 1994

Ohio Auto/Diesel Technical Institute, Cleveland OH
Course: Diesel Generation Technology
Graduation: Mar 1994



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

TAB D

FORM 2

BID FORM

Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by City for the duration of the three (3)-year term contract.

JOB CLASSIFICATION	REGULAR HOURS HOURLY RATE	AFTER HOURS HOURLY RATE
Master Electrician	\$ 120.00	\$ 170.00
Journeyman/Supervisor	\$ 120.00	\$ 170.00
Apprentice/Laborer	\$ 75.00	\$ 115.00
Permit Fee Reimbursement	<u>At Actual Cost</u>	

EQUIPMENT WITH OPERATOR	HOURLY RATE
Bucket Truck or Lift	\$ 275.00
Auger w/ Pole Setter	\$ 350.00
Trencher	\$ 250.00
	\$
	\$

PARTS & MATERIALS MARK-UP	PERCENTAGE
Percentage (Not to exceed 10%)	10 %

Notes:

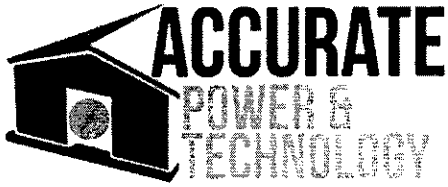
1. "After Hours" price shall not exceed two times that of the normal operating price.
2. Contractors will bill for parts and materials at wholesale cost + percentage mark-up in an amount not to exceed 10 percent. Supplier invoices must be attached to all invoices as applicable.
3. Costs for additional equipment rates can be included in rows provided under EQUIPMENT WITH OPERATOR table.

If requested by City, Contractor must return any damaged parts to City after performing repairs.

Authorized Signatory: _____

(Signature)

Title: President _____



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

TAB E

FORM 3

ILLUSTRATIVE WORK

Work by vendor best illustrates current proposals relevant to the RFP that have been/is being accomplished by personnel that shall be assigned to the City. List no more than five (5) projects.

<u>Project Name & Location</u> Pinellas County Schools <u>Project Manager:</u> Brian Eakin		<u>Client's Name & Address</u> Pinellas County Schools 301 4th Street Largo, FL 33770
<u>Completion Date (Actual or Estimated):</u> 7/1/2024		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Mike McClimon Manager mcclimonm@pbsb.org
<u>Contractor Fees (In Thousands)</u> Entire Project: \$ 200K	Work for which vendor was/is responsible: \$ 200K	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Provide Electrical Repair Services for all Generators and transfer switches		
<u>Nature of Vendor's Responsibility in Project</u> (Please give quantitative indications wherever possible) Provide Electrical Repair Services for all Generators and transfer switches		
<u>Vendor's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the City's Project</u> Brian Eakin is the manager for the project.		

FORM 3

ILLUSTRATIVE WORK

Work by vendor best illustrates current proposals relevant to the RFP that have been/is being accomplished by personnel that shall be assigned to the City. List no more than five (5) projects.

<u>Project Name & Location</u> Lee County Schools Generator Replacements <u>Project Manager:</u> Brian Eakin		<u>Client's Name & Address</u> Lee County Schools 2855 Colonial Blvd Fort Myers, FL 33966
Completion Date (Actual or Estimated): 8/30/2023		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Carlos (Carl) Allen carlosma@leeschools.net
<u>Contractor Fees (In Thousands)</u> Entire Project: \$ 750K	Work for which vendor was/is responsible: \$ 750K	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Provide Electrical Services for Generator Replacements County Wide		
<u>Nature of Vendor's Responsibility in Project</u> (Please give quantitative indications wherever possible) We would individually quote generator Generator Replacements for them. The dollar figure above is work completed to date.		
<u>Vendor's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the City's Project</u> Chris Ethridge as the lead electrical, and Brian Eakin as the manager.		

FORM 3

ILLUSTRATIVE WORK

Work by vendor best illustrates current proposals relevant to the RFP that have been/is being accomplished by personnel that shall be assigned to the City. List no more than five (5) projects.

<u>Project Name & Location</u> City of Altamonte Springs Lift Stations 17and 61 installation <u>Project Manager:</u> Chris Ethridge		<u>Client's Name & Address</u> City of Altamonte Springs, FL 950 CaribeDr Altamonte Springs, FL 32714
Completion Date (Actual or Estimated): 8/1/2022		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Kip Lockucff - 407571.8533 contract manager klokcuff@altamonte.org
<u>Contractor Fees (In Thousands)</u> Entire Project: \$ 250K	Work for which vendor was/is responsible: \$ 50K	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Provide Electrical Services for two Lift Station installations. The transfer switch and Generators were client supplied.		
<u>Nature of Vendor's Responsibility in Project</u> (Please give quantitative indications wherever possible) Provide Electrical Services for two Lift Station installations. The transfer switch and Generators were client supplied.		
<u>Vendor's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the City's Project</u> Chris Ethridge as the lead electrical, and Brian Eakin as the manager.		

FORM 3

ILLUSTRATIVE WORK

Work by vendor best illustrates current proposals relevant to the RFP that have been/is being accomplished by personnel that shall be assigned to the City. List no more than five (5) projects.

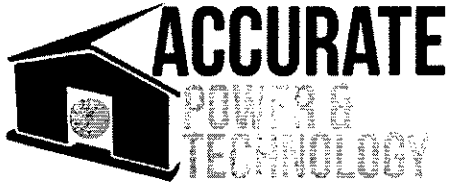
<u>Project Name & Location</u> FDOT Electrical Services <u>Project Manager:</u> Brian Eakin		<u>Client's Name & Address</u> FDOT Various Locations
Completion Date (Actual or Estimated): 8/30/2023		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> 407.883.9630 Dan Whalen, Contract Manager dan.whelen@dot.state.fl.us
<u>Contractor Fees (In Thousands)</u> Entire Project: \$ 28K	Work for which vendor was/is responsible: \$ 28K	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Provide Electrical Services for FDOT		
<u>Nature of Vendor's Responsibility in Project</u> (Please give quantitative indications wherever possible) We are responsible for the parking lot lights for the turnpike plazas and the gantry site from Orlando to Yehaw Junction.		
<u>Vendor's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the City's Project</u> Chris Ethridge as the lead electrical, and Brian Eakin as the manager.		

FORM 3

ILLUSTRATIVE WORK

Work by vendor best illustrates current proposals relevant to the RFP that have been/is being accomplished by personnel that shall be assigned to the City. List no more than five (5) projects.

<u>Project Name & Location</u> Martin County Generator Services <u>Project Manager:</u> Paul Schumacher		<u>Client's Name & Address</u> Martin County Florida 2555 SE Avenger Cir Stuart, FL 34996
Completion Date (Actual or Estimated): 7/1/2024		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Jay Pieler Manager 772.419.6072 jpieler@martin.fl.us
<u>Contractor Fees (In Thousands)</u> Entire Project: \$ 120K	Work for which vendor was/is responsible: \$ 120K	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Provide Electrical Repair Services for all Generators and transfer switches		
<u>Nature of Vendor's Responsibility in Project</u> (Please give quantitative indications wherever possible) Provide Electrical Repair Services for all Generators and transfer switches		
<u>Vendor's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the City's Project</u> Paul Schumacher is the manager for the project and Chris Ethridge completes the lead electrical work.		



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

TAB F

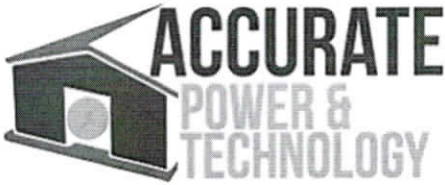
Project #1:	
Project Name: Generator Service and Repair	
Type of Project/Service: Major and Minor Service and Generators and Transfer Switches	
Address: 950 Calabria Dr. Altamonte Springs, FL 32714	
Contracting Agency/Client: City of Altamonte Springs	
Contact Name and Phone #: 407.571.8533	
Contact Email Address and Fax #: klokcuff@altamonte.org	
Contract Amount: 110K	Date Work Performed: Current Contract since 2020
Project #2:	
Project Name: Generator Service and Repair	
Type of Project/Service: Major and Minor Service and Generators and Transfer Switches	
Address: 2555 SE Avenger Cir Stuart, FL 34996	
Contracting Agency/Client: Martin County	
Contact Name and Phone #: Jay Pieler 772.419.6072	
Contact Email Address and Fax #: jpieler@martin.fl.us	
Contract Amount: 60K	Date Work Performed: Current Contract Since 2021
Project #3:	
Project Name: Generator Service and Repair	
Type of Project/Service: Major and Minor Service and Generators and Transfer Switches	
Address: 3651 LPGA Blvd Daytona Beach ,FL 32124	
Contracting Agency/Client: City of Daytona Beach	
Contact Name and Phone #: Michael Riley 386.671.8810	
Contact Email Address and Fax #: rileymichael@codb.us	
Contract Amount: 255K	Date Work Performed: Current Since 2021
Project #4:	
Project Name: Generator Service and Repair	
Type of Project/Service: Major and Minor Service and Generators and Transfer Switches	
Address: 104 N Alaska Ave Kissimmee, FL 34741	
Contracting Agency/Client: City of Kissimmee	
Contact Name and Phone #: RJ Littlefield 407.847.2821 Ext 2622	
Contact Email Address and Fax #: randall.littlefield@kissimmee.gov	
Contract Amount: 22K	Date Work Performed: Current since 2020
Project #5:	
Project Name: Generator Service and Repair	
Type of Project/Service: Major and Minor Service and Generators and Transfer Switches	
Address: 301 4TH St. SW Largo, FL 33770	
Contracting Agency/Client: Pinellas County Schools	
Contact Name and Phone #: Mik McClimon 727.638.3373	
Contact Email Address and Fax #: mcclimonm@pcsb.org	
Contract Amount: 100K	Date Work Performed: Current Contract since 2020

PLEASE COMPLETE AND SUBMIT WITH YOUR RESPONSE
Failure to submit this form may be grounds for disqualification of your submittal



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

TAB G



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

Project Approach

When we get a new Client/Contract we request a meeting to get started. This way we can put some names with some faces and discuss expectations and immediate needs for our services. An example site visit can be conducted to review certain light part numbers and items to assist us in gathering the information to stock particular items. Records are retained for the life of the contract and released to the manager and/or added to the logbooks upon completion. We will welcome all service calls and they will be given the upmost attention to ensure we are repairing as efficient as possible both parties.

Accurate Power has the staff and the ability to respond within 2 hours. There is 24-hour call service that is dispatched to the on-call tech and the manager on duty.

Thank you,
Sonny J Dukes, President

A handwritten signature in blue ink, consisting of a stylized 'S' and 'J' followed by a horizontal line.



Offices Eustis, Sarasota, Vero
Office: 352-735-8285
Fax: 352-609-5165

Services Offered

Accurate Power and technology provide the best possible cutting-edge backup power and electrical service products for any budget. We focus on quality and service across every client we serve.

New Equipment Sales:

Kohler Industrial and Residential
Generac Industrial and Residential
Cummins Residential
Gillette Industrial and residential
ASCO Transfer Switches
Thomson Transfer Switches

Briggs and Stratton Industrial

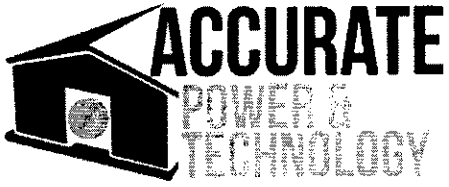
Maintenance Plans:

Flexible PM Plans Optimized to meet your needs
Monthly, quarterly, semi-annually, annually
Service all brands of major manufacturers of Generators and Transfer Switches
Including older brands and transfer switches
Resistive/Reactive load bank testing
Compliance with NFPA110 and AHCA
Meet national electrical, fire codes, and standards
Coastal Packages and Flood Zone Solutions

Ala Carte Services

Electrical Contractors License
LP/ NG Contractor License
Turn -Key Installations
Installation Services
On-Demand service 24/7/365
Hurricane Plans
Emergency response Teams
System Analysis
Owner Training
Upgrade Programs
Extend the life of existing generators and ATS
Fuel Delivery Service
Fuel Polishing
Full Commercial Electrical Services from interior to Parking Lot Lights

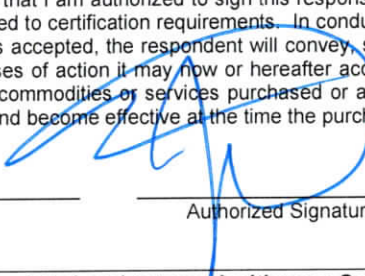
Remote Monitoring
Facilities Automation integration
Thermography services



15519 U.S. Hwy 441
Eustis, FL 32726
Office: 352-735-8285
Fax: 352-609-5165

TAB H

PROPOSER'S CERTIFICATION

Submit To: City of Wildwood 100 N Main Street Wildwood, FL 34785 352-330-1330 352-330-1338 (fax)		CITY OF WILDWOOD REQUEST FOR PROPOSAL (RFP) CERTIFICATION AND ADDENDA ACKNOWLEDGMENT	
DUE DATE: 6/8/2023	DUE TIME: 11:30	RFP # 2023 - 14	
TITLE: ELECTRICAL SERVICES			
VENDOR NAME: Accurate Power and Technology, Inc / DBA-A Generator Guy		PHONE NUMBER: 352.735.8285	
VENDOR MAILING ADDRESS: 15519 US Highway 441 Suite A101		FAX NUMBER: 352.609.5165	
CITY/STATE/ZIP: Eustis, FL 32726		E-MAIL ADDRESS: sonny@accuratepowerandtechnology.com	
"I, the undersigned, certify that I have reviewed the addenda listed below (list all addenda received to date). I understand that timely commencement will be considered in award of this RFP and that cancellation of award will be considered if commencement time is not met, and that untimely commencement may be cause for termination of contract. I further certify that the services will meet or exceed the RFP requirements. I, the undersigned, declare that I have carefully examined the RFP, specifications, terms and conditions as applicable for this Request, and that I am thoroughly familiar with all provisions and the quality and type of coverage and services specified. I further declare that I have not divulged, discussed, or compared this RFP with any other Offeror and have not colluded with any Offerors or parties to an RFP whatsoever for any fraudulent purpose."			
_____ Addendum #	_____ Addendum #	_____ Addendum #	_____ Addendum #
"I certify that this quote is made without prior understanding, agreement, or connection with any corporation, vendor, or person submitting an RFP for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this response and that the offer is in compliance with all requirements of the RFP, including but not limited to certification requirements. In conducting offers with an agency for CITY OF WILDWOOD, respondent agrees that if this RFP is accepted, the respondent will convey, sell, assign, or transfer to the City of Wildwood all rights, title and interest in and to all causes of action it may now or hereafter acquire under the anti-trust laws of the United States for price fixing relating to the particular commodities or services purchased or acquired by the CITY. At the City of Wildwood discretion, such assignment shall be made and become effective at the time the purchasing agency renders final payment to the respondent."			
Sonny J Dukes, President _____ Authorized Agent Name, Title (Print)		 _____ Authorized Signature	6/5/2023 _____ Date
<i>This form must be completed and returned with your Submittal</i>			

PROPOSALS FORM FOR CITY OF WILDWOOD



Name of Vendor Submitting Proposals Accurate Power and Technology, Inc/DBA-A Generator Guy

Name of Person Submitting Proposals Sonny J Dukes

PROPOSER ACKNOWLEDGMENT

"The undersigned hereby declares that he/she has informed himself/herself fully in regard to all conditions to the work to be done, and that he/she has examined the RFP and Specifications for the work and comments hereto attached. The Vendor proposes and agrees, if this submission is accepted, to contract with the City of Wildwood to furnish all necessary materials, equipment, labor and services necessary to complete the work covered by the RFP and Contract Documents for this Project. The Vendor agrees to accept in full compensation for each item the prices named in the schedules incorporated herein."



Signature

6/5/2023
Date

2023-14
RFP Number

[☐] Check if exception(s) or deviation(s) to Specifications. Attach separate sheet(s) detailing reason and type for the exception or deviation.

This document must be completed and returned with your Submittal.

Statement of Terms and Conditions

PUBLIC ENTITY CRIME: A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal/Bid on a contract to provide any goods or services to a public entity, for the construction or repair of a public building or public work, may not submit Proposals/Bids on leases of real property to a public entity, may not be awarded or perform work as a Contractor, supplier, subContractor, or Contractor under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

INDEMNIFICATION: The contractor shall indemnify and hold harmless the City and its officers and employees, from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorneys' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the design professional and other persons employed or utilized by the design professional in the performance of the contract.

PROHIBITION OF LOBBYING: During the blackout period which is, the period between the time the submittals for Invitation to Bid or the Request for Proposals, or Proposals, or information, as applicable, are received at Contracts / Purchasing and the time the City awards the contract, no proposer, no lobbyist, principal, or other person may lobby, on behalf of a competing party in a particular procurement matter, any member of the City, or any City employee other than the _____. Violation of this provision may result in disqualification of the party. All questions regarding this Request for Proposals (RFP) or Invitation to Bid (IBID) must be submitted in writing to the City's Financial Services Manager.

ANTI TRUST LAWS: By submission of a signed RFP or IBID, the successful Vendor acknowledges compliance with all antitrust laws of the United States and the State of Florida, in order to protect the public from restraint of trade, which illegally increases prices.

CONFLICT OF INTEREST: The award of the contract hereunder is subject to the provisions of Chapter 112 of the Florida Statutes. Vendors shall disclose the name of any Officer, Director, Partner, Associate, or Agent who is also an Officer, Appointee, or Employee of any of the City's at the time of the RFP or IBID, or at the time of occurrence of the Conflict of Interest thereafter.

INTERPRETATION, CLARIFICATIONS AND ADDENDA: No oral interpretations will be made to any vendor as to the meaning of the RFP/IBID Contract Documents. Any inquiry or request for interpretation received by the _____ before the date listed herein will be given consideration. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, will be distributed at or after the Pre-Proposals/Pre-Bid Conference, mailed or sent by available or electronic means to all attending prospective Submitters prior to the established RFP/IBID opening date. Each Vendor shall acknowledge receipt of such addenda in the space provided. In case any Proposer/Bidder fails to acknowledge receipt of such addenda or addendum, his offer will nevertheless be construed as though it had been received and acknowledged and the submission of his bid will constitute acknowledgment of the receipt of same. All addenda are a part of the RFP/IBID FORMS and each Proposer/Bidder will be bound by such addenda, whether or not received by him. It is the responsibility of each proposer/bidder to verify that he has received all addenda issued before RFP's/IBID's are opened. In the case of unit price items, the quantities of work to be done and materials to be furnished under this RFP/IBID Contract are to be considered as approximate only and are to be used solely for the comparison of RFP's/IBID's received. The City and/or his CONTRACTOR do not expressly or by implication represent that the actual quantities involved will correspond exactly therewith; nor shall the Vendor plead misunderstanding or deception because of such estimate or quantities of work performed or material furnished in accordance with the Specifications and/or Drawings and other Proposals/Bid Documents, and it is understood that the quantities may be increased or diminished as provided herein without in any way invalidating any of the unit or lump sum prices bid.

GOVERNING LAWS AND REGULATIONS: The vendor is required to be familiar with and shall be responsible for complying with all federal, state and local laws, ordinances, rules and regulations that in any manner affect the work.

PROPRIETARY/CONFIDENTIAL INFORMATION: Vendors are hereby notified that all information submitted as part of, or in support of RFP's/IBID's, will be available for public inspection ten days after opening of the RFP's/IBID's or until a short list is recommended whichever comes first, in compliance with Chapter 119, and 287 of the Florida Statutes. All RFP's/IBID's submitted in response to this solicitation become the property of the City. Unless information submitted is proprietary, copy written, trademarked, or patented, the City reserves the right to utilize any or all information, ideas, conceptions, or portions of any RFP/IBID, in its best interest.

TAXES: The City of Wildwood is exempt from any taxes imposed by the State and/or Federal Government. Exemption certificates will be provided upon request.

NON-COLLUSION DECLARATION: By signing this RFP/IBID, all Vendors shall affirm that they shall not collude, conspire, connive or agree, directly or indirectly, with any other Proposer, vendor, or person to submit a collusive or sham Proposal in connection with the work for which their RFP/IBID has been submitted, or to refrain from Bidding in connection with such work; or have in any manner, directly or indirectly, sought by person to fix the price or prices in the RFP/IBID or of any other Bidder, or to fix any overhead, profit, or cost elements of the RFP/IBID price or the RFP/IBID price of any other Bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against any other Bidder, or any person interested in the proposed work.

PROPOSER RESPONSIBILITY: Invitation by the City's to vendors is based on the recipient's specific request or as the result of response by the public to the legal advertisements required by State law. Vendors or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.

CITYSHIP OF SUBMITTALS: All responses, inquiries or correspondence relating to or in reference to this RFP/IBID, and all other reports, charts, displays, schedules, exhibits and other documentation submitted by the vendors will become the property of the City. Reference to literature submitted with a previous RFP/IBID will not relieve the Bidder from including any required documents with this RFP/IBID.

EXAMINATION OF BID DOCUMENTS: Each Bidder shall carefully examine the RFP/IBID Document to ensure all pages have been received, all drawings and/or Specifications and other applicable documents are included, and shall inform himself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the CONTRACTOR will in no way relieve him of the obligations and responsibilities assumed under the Contract.

VENDOR RESPONSIBILITY: Vendors are fully and completely responsible for the labeling, identification and delivery of their submittals. The _____ will not be responsible for any mislabeled or misdirected submissions, nor those handled by delivery persons, couriers, or the US Postal Service.

DRUG FREE WORKPLACE: All Proposers/Bidders shall submit the enclosed, duly signed and notarized form entitled "Drug Free Workplace Certificate". The Drug Free Workplace Vendor shall have the burden of demonstrating that his program complies with Section 287.087 of the Florida Statutes, and any other applicable state law.

THE CITY OF WILDWOOD, is a political subdivision of the State of Florida, and reserves the right to reject any and/or all submittals, reserve the right to waive any informalities or irregularities in the examination process, and reserve the right to award contracts and/or in the best interest of the City. Submittals not meeting stated minimum terms and proposals may be rejected by the City as non-responsive. The City reserves the right to reject any or all submittals without cause. The City reserves the right to reject the submission of any Vendor in arrears or in default upon any debt or contract to the City, or who has failed to perform faithfully any previous contract with the City's or with other governmental agencies.

PUBLIC RECORDS LAW: Correspondence, materials and documents received pursuant to this RFP/IBID become public records subject to the provisions of Chapter 119, Florida Statutes.

VERIFICATION OF TIME: Nextel time is hereby established as the Official Time of the City's.

PREPARATION OF PROPOSALS/BIDS:

Signature of the Bidder: The Bidder must sign the RFP/IBID FORMS in the space provided for the signature. If the Proposer/Bidder is an individual, the words "doing business as _____" must appear beneath such signature. In the case of a partnership, the signature of at least one of the partners must follow the vendor name and the words, "Member of the Vendor" should be written beneath such signature. If the Proposer/Bidder is a corporation, the title of the officer signing the RFP/IBID on behalf of the corporation must be stated and evidence of his authority to sign the RFP/IBID must be submitted. The Proposer/Bidder shall state in the RFP/IBID FORMS the name and address of each person interested therein.

Basis for Bidding: The price proposed for each item shall be on a lump sum or unit price basis according to specifications on the RFP/IBID FORM. The proposed prices shall remain unchanged for the duration of the Contract and no claims for cost escalation during the progress of the work will be considered, unless otherwise provided herein.

Total Proposed Price/Total Contract Sum Proposed: If applicable, the total price bid for the work shall be the aggregate of the lump sum prices proposed and/or unit prices multiplied by the appropriate estimated quantities for the individual items and shall be stated in figures in the appropriate place on the RFP/IBID FORM. In the event that there is a discrepancy on the RFP/IBID FORM due to unit price extensions or additions, the corrected extensions and additions shall be used to determine the project bid amount.

TABULATION: Those wishing to receive an official tabulation of the results of the opening of this RFP/IBID are to submit a self-addressed, stamped business size (No. 10) envelope, prominently marked on the front lower left side, with the RFP identification. Tabulation requested by telephone, fax or electronic media will not be accepted.

OBLIGATION OF WINNING BIDDER: The contents of the RFP/IBID of the successful proposer/bidder will become contractual obligations if acquisition action ensues. Failure of the successful Proposer/Bidder to accept these obligations in a contract may result in cancellation of the award and such vendor may be removed from future participation.

AWARD OF BID: It is the City's intent to select a vendor within **sixty (60) calendar days** of the deadline for receipt of Proposals/Bids. However, Proposals/Bids must be vendor and valid for award for at least **ninety (90) calendar days** after the deadline for receipt of the RFP/IBID.

ADDITIONAL REQUIREMENTS: The vendors shall furnish such additional information as the City may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The City reserves the right to make investigations of the proposals of the vendor as it deems appropriate.

PREPARATION COSTS: The City shall not be obligated or be liable for any costs incurred by Proposers/Bidders prior to issuance of a contract. All costs to prepare and submit a response to this RFP/IBID shall be borne by the Proposer/Bidder.

TIMELINESS: All work will commence upon authorization from the City's representative. All work will proceed in a timely manner without delays. The Contractor shall commence the work UPON RECEIPT OF NOTICE TO PROCEED and/or ORDER PLACED (PURCHASE ORDER PRESENTED), and shall deliver in accordance to the terms and conditions outlined and agreed upon herein.

DELIVERY: All prices shall be FOB Destination, Sumter County, Florida, inside delivery unless otherwise specified.

ADDITIONAL SERVICES/PURCHASES BY OTHER PUBLIC AGENCIES ("PIGGY-BACK"):

The Vendor by submitting a Bid acknowledges that other Public Agencies may seek to "Piggy-Back" under the same terms and conditions, during the effective period of any resulting contract - services and/or purchases being offered in this Bid, for the same prices and/or terms proposed. Vendor has the option to agree or disagree to allow contract Piggy-Backs on a case-by-case basis. Before a Public Agency is allowed to Piggy-Back any contract, the Agency must first obtain the vendor's approval - without the vendor's approval, the seeking Agency cannot Piggy-Back.

PLANS, FORMS & SPECIFICATIONS: Bid Packages are available from the _____. These packages are available for pickup or by mail. If requested to mail, the Proposer/Bidder must supply a courier account number (UPS, FedEx, etc.). Proposers/Bidders are required to use the official RFP/IBID FORMS, and all attachments itemized herein, are to be submitted as a single document. Any variation from the minimum specifications must be clearly stated on the RFP/IBID FORM and/or Exceptions/Deviations Sheet(s). Only one set of plans, forms, and specifications will be furnished each company or corporation interested in submitting a Proposal/bid. RFP/IBID FORM documents for this project are free of charge and are available on-line and are downloadable.

MANUFACTURER'S NAME AND APPROVED EQUIVALENTS: Any manufacturer's names, trade names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition unless otherwise indicated. The Proposer/Bidder may offer any brand for which he is an authorized representative, which meets or exceeds the RFP/IBID specification for any item(s). If RFP's/IBID's are based on equivalent products, indicate on the RFP/IBID FORM the manufacturer's product name and literature, and/or complete specifications. Reference to literature submitted with a previous RFP/IBID will not satisfy this provision. The Proposer/Bidder shall explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. RFP's/IBID's which do not comply with these requirements are subject to rejection. RFP's/IBID's lacking any written indication of intent to quote an alternate brand will be received and considered in complete compliance with the specifications as listed on the RFP/IBID FORM. The _____ is to be notified, in writing, of any proposed changes in materials used, manufacturing process, or construction. However, changes shall not be binding upon the City unless evidenced by a Change Notice issued and signed by the _____, or designated representative.

QUANTITIES: The quantities as specified in this RFP/IBID are estimates only and are not to be construed as guaranteed minimums.

SAMPLES: Samples of items, when called for, shall be furnished free of expense, and if not destroyed may, upon request, be returned at the Proposer's/Bidder's expense. Each sample shall be labeled with the Proposer's/Bidder's name, manufacturer brand name and number, RFP/IBID number and item reference. Samples of successful Proposer's/Bidder's items may remain on file for the term of the contract. Request for return of samples shall be accompanied by instructions which include shipping authorization and must be received at time of opening. Samples not returned may be disposed of by the City within a reasonable time as deemed appropriate.

DOCUMENT RE-CREATION: Vendor may choose to re-create any document(s) required for this solicitation, but must do so at his own risk. All required information in the original City format must be included in any re-created document. Submittals may be deemed non-responsive if required information is not included in any re-created document.

ACKNOWLEDGED:

*This document must be completed and returned with your
Submittal.*

(Signature and Date)

6/5/2023

HOLD HARMLESS AGREEMENT

The Contractor agrees to hold the City of Wildwood harmless against all claims for bodily injury, sickness, disease, death or personal injury or damage to property or loss of use resulting there from, arising out of the agreement, to the extent that such claims are attributable, in whole or in part, to a negligent act or omission by the Contractor.

The Contractor shall purchase and maintain workers' compensation insurance for all workers' compensation insurance and employers' liability in accordance with Florida Statute Chapter 440.

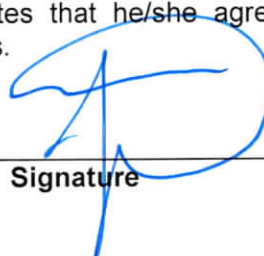
The Contractor shall also purchase any other coverage required by law for the benefit of employees.

Required insurance shall be documented in Certificates of Insurance and shall be provided to the City representative requesting the service.

By signature upon this form the Contractor stipulates that he/she agrees to the Hold Harmless Agreement, and to abide by all insurance requirements.

Accurate Power and Technology, Inc / Sonny J Dukes

Contractor/ Vendor-Print Name


Signature

Electrical Services

Project Name

6/5/2023

Date

The effective date of this Hold Harmless Agreement shall be for the duration of this project.

This document must be completed and returned with your Submittal.

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that,

Accurate Power and Technology, Inc / BDA-A Generator Guy
(print or type name of vendor)

- Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
- Informs employees about the dangers of drug abuse in the work place, the vendor's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
- Gives each employee engaged in providing commodities or contractual services that are under RFP or bid, a copy of the statement specified above.
- Notifies the employees that as a condition of working on the commodities or contractual services that are under RFP or bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, plea or guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
- Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.
- "As a person authorized to sign this statement, I certify that the above named business, vendor or corporation complies fully with the requirements set forth herein".



Authorized Signature

6/5/2023

Date Signed

State of: Florida

County of: Lake

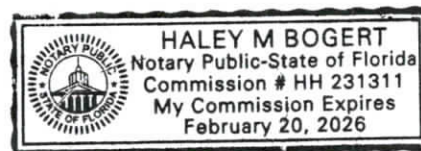
Sworn to and subscribed before me this 5th day of June, 2023

Personally known ☒ or Produced Identification _____
(Specify Type of Identification)


Signature of Notary

My Commission Expires 2/20/2026

(seal)



This document must be completed and returned with your Submittal.

entity submitting this sworn statement. {indicate which statement applies.}

 x Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

 The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

 The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. {attach a copy of the final order}

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.



{signature}

6/5/2023

{date}

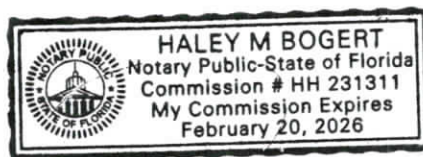
State of Florida

County of Lake

PERSONALLY APPEARED BEFORE ME, the undersigned authority, Sonny Duker, who after first being sworn by me, affixed his/her signature in the space provided above on this 5th day of June, 2023

Attest: Haley M. Bogert
Notary Public
My commission expires: 02/20/2026

(Notary Seal)



This document must be completed and returned with your Submittal.

Conflict of Interest Disclosure Form

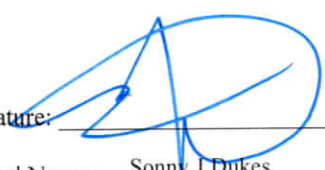
I HEREBY CERTIFY that

2. I (*printed name*) Sonny J Dukes am the
(*title*) President and the duly authorized representative of the vendor of (*Vendor*
(*Name*) Accurate Power and Technology, Inc whose address is
15519 US Highway 441 Suite A101 Eustis, FL 3726
, and that I possess the legal authority to make this affidavit on behalf of myself and the
vendor for which I am acting; and,

2. Except as listed below, no employee, officer, or agent of the vendor have any conflicts of interest, real or apparent,
due to ownership, other clients, contracts, or interests associated with this project; and,

3. This bid proposal is made without prior understanding, agreement, or connection with any corporation, vendor, or
person submitting a bid proposal for the same services and is in all respects fair and without collusion or fraud.

EXCEPTIONS (List) N/A

Signature: 

Printed Name: Sonny J Dukes

Vendor Name: Accurate Power and Technology, Inc / DBA-A Generator Guy

Date: 6/5/2023

State of Florida

County of Lake

Sworn to and subscribed before me this 5th day of June 20 23

Personally Known ☒

OR Produced Identification ☐, Type of Identification _____

My Commission Expires 02/20/2026


(Printed, typed or stamped commissioned name of notary)



This document must be completed and returned with your Submittal

Immigration Affidavit Certification

This Affidavit is required and should be signed, notarized by an authorized principal of the firm, and submitted with formal Invitations to Bid (ITB's) and Request for Proposals (RFP) submittals. Further, Consultants / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment, at the time of the submission of the Consultant's/bidder's proposal. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company. Failure to include this Affidavit and acceptable evidence of enrollment in the E-Verify program may deem the Consultant / Bidder's proposal as nonresponsive.

The City of Wildwood will not intentionally award City contracts to any Consultant who knowingly employs unauthorized alien workers, constituting a violation of the employment provision contained in 8 U.S.C. Section 1324 a(e) Section 274A(e) of the Immigration and Nationality Act ("INA").

The City of Wildwood may consider the employment by any Consultant of unauthorized aliens a violation of Section 274A (e) of the INA. Such Violation by the recipient of the Employment Provisions contained in Section 274A (e) of the INA shall be grounds for unilateral termination of the contract by the City of Wildwood.

Consultant attests that they are fully compliant with all applicable immigration laws (specifically to the 1986 Immigration Act and subsequent Amendment(s)) and agrees to comply with the provisions of the Memorandum of Understanding with E-Verify and to provide proof of enrollment in The Employment Eligibility Verification System (E-Verify), operated by the Department of Homeland Security in partnership with the Social Security Administration at the time of submission of the Consultant's / Bidder's proposal.

Company Name: Accurate Power and Technology, Inc / DBA-A Generator Guy

Print Name: Sonny J Dukes Title: President

Signature: [Signature] Date: 6/5/2023

State of FL County of Lake

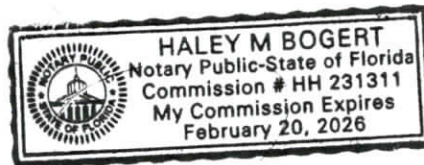
The foregoing instrument was signed and acknowledged before me this 5th day of June, 2023 by

Sonny Dukes who has produced _____ as identification.
(Print or Type Name) (Type of Identification and Number)

[Signature]
Notary Public Signature

Haley M. Bogert
Printed Name of Notary Public

HH231311 02/20/2026
Notary Commission Number/Expiration



The signee of this affidavit guarantees, as evidenced by the affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Accurate Power and Technology, Inc	
	2 Business name/disregarded entity name, if different from above A Generator Guy	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☒ S Corporation ☐ Partnership ☐ Trust/estate ☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. ☐ Other (see instructions) ►	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ (Applies to accounts maintained outside the U.S.)	
	5 Address (number, street, and apt. or suite no.) See instructions. 15519 West Us Highway 441 Suite A101	Requester's name and address (optional)
	6 City, state, and ZIP code Eustis, FL 32726	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number								
			-				-	
or								
Employer identification number								
2	0	-	2	6	6	3	0	6

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ► <i>Sonny Dukes</i>	Date ► 1/5/2023
-----------	---	-----------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
10/31/2022

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 Hylant - Orlando 250 International Pkwy, Ste 330 Lake Mary FL 32746 License#: 23894 ACCUPOV-01	CONTACT NAME: Adrian Rivas	FAX (A/C, No): 407-740-5522	
	PHONE (A/C, No, Ext): 407-740-5550	E-MAIL ADDRESS: orlandocommercial@hylant.com	
INSURED Accurate Power and Technology DBA: A Generator Guy 15519 West Highway 441, Suite 101A Eustis FL 32726	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: Ohio Security Insurance Co		24082
	INSURER B: Insurance Company of the West		13269
	INSURER C: AIG Specialty Insurance Company		26883
	INSURER D: INFINITY INS CO		
	INSURER E:		
INSURER F:			

COVERAGES **CERTIFICATE NUMBER:** 1990555736 **REVISION NUMBER:**

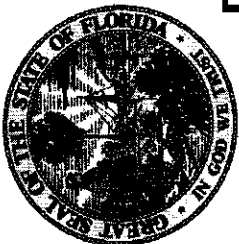
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE 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	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC ☐ OTHER:	Y		BLS2262118007	11/1/2022	11/1/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
D	☒ AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS NON-OWNED AUTOS ONLY ☐ HIRED AUTOS ONLY			509-82006-1093-001	7/4/2022	7/4/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	☐ UMBRELLA LIAB ☒ OCCUR ☒ EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☐ RETENTION \$			018233495	5/23/2022	11/1/2022	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 Products Completed Op \$ 2,000,000
B	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	N/A	WFL506398900	1/21/2022	1/21/2023	PER STATUTE ☐ OTH-ER ☐ E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

CERTIFICATE HOLDER	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 <i>Judy K. Wilson</i>
---------------------------	---

© 1988-2015 ACORD CORPORATION. All rights reserved.

Ron DeSantis, Governor



Melanie S. Griffin, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

ELECTRICAL CONTRACTORS' LICENSING BOARD

THE ELECTRICAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES
Additional Business Qualification



PHILLIPS, JACK E

A GENERATOR GUY
32744 SCENIC HILLS DRIVE
MOUNT DORA FL 32757

LICENSE NUMBER: EC13007737

EXPIRATION DATE: AUGUST 31, 2024

Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.





REQUEST FOR PROPOSAL for ELECTRICAL SERVICES

RFP # 2023-14

**City of Wildwood
100 N Main Street
Wildwood, FL 34785**

**352-330-1343 (Phone)
352-330-1353 (Fax)**

CALENDAR OF EVENTS / RFP TIMELINE

Listed below are the important dates and times by which the actions noted must be completed. All dates are subject to change by the CITY OF WILDWOOD. If the CITY OF WILDWOOD finds it necessary to change any of these dates or times prior to the due date, the change will be accomplished by addendum.

<u>ACTION</u>	<u>COMPLETION DATE</u>
Issue RFP	May 12, 2023
Last Day for Questions	May 23, 2023
Addendums Posted (If Necessary)	May 30, 2023
Submission Deadline	June 8, 2023 @ 11:30 a.m.
Selection Committee Meeting	TBD
Contract Award	TBD

PART 1 - INTENT AND GENERAL INFORMATION

REQUEST FOR PROPOSALS

Sealed proposal will be received by the CITY OF WILDWOOD at City Hall located at 100 N Main Street, Wildwood, Florida 34785 until 11:30 am on June 8, 2023. Proposers shall take careful notice of the following conditions of this Request for Proposals:

- Submissions by FAX or other electronic media will not be accepted under any circumstances. Late submissions will not be accepted under any circumstances.
- Submitters may withdraw and/or replace proposals at any time until the deadline for submission of proposals.
- All questions received by May 23, 2023, will be considered. Questions will not be answered over the phone. Questions regarding the RFP process must be in writing and faxed to (352) 330-1353 Attention: Thomas J. Rigwood, or via email to trigwood@wildwood-fl.gov
- Do not attempt to contact any Selection Committee Member, staff member or any person other than Jeremy Hockenbury for questions relating to this project. Anyone attempting to lobby CITY OF WILDWOOD representatives may be disqualified. The Selection Committee Members shall be Thomas J Rigwood, Asst. Public Works Director, Terry Bunn Facilities Supervisor, and Dillon Jones, Facilities Trades Technician.
- Any bidder affected adversely by an intended decision with respect to the award of any bid, shall file with the City Clerk's Office for the CITY OF WILDWOOD, a written notice of intent to file a protest not later than seventy-two (72) hours (excluding Saturdays, Sundays, and legal holidays), after the posting of the bid tabulation. Bid protest procedures may be obtained in The City Clerk's Office, City Hall, 100 N Main Street, Wildwood, Florida 34785 between 8:00 A.M. to 5:00 P.M. Monday through Friday.
- IT IS THE SOLE RESPONSIBILITY OF EACH RESPONDENT TO MONITOR WILDWOOD'S WEBSITE (WWW.WILDWOOD-FL.GOV) FOR ANY AND ALL BID DOCUMENTS, INCLUDING ADDENDUMS.

PROPOSAL DOCUMENTS CHECKLIST OF ITEMS REQUIRED TO BE SUBMITTED

The following documents and forms in the following arrangement must accompany each Proposal Package or alternate RFP submitted:

- ✘ One (1) original, one (1) electronic single PDF version on a CD or Flash Drive of the original RFP in its entirety not password protected, four (4) copies of the vendor's original submittal packet.
- ✘ RFP Cover Page. This is to be used as the first page of the RFP. This form must be fully completed and signed by an authorized officer of the vendor.
- ✘ Tab A – Statement of Interest
- ✘ Tab B – Vendor Profile (Form 1)
- ✘ Tab C – Team Composition and Resumes
- ✘ Tab D – Bid Form (Form 2)
- ✘ Tab E – Illustrative Work (Form 3)
- ✘ Tab F – References
- ✘ Tab G – Additional Information
- ✘ Tab H – Additional Required Documents
 - Proposer's Certification / Addenda Acknowledgement Form
 - Proposal Form
 - Statement of Terms and Conditions - statement must be signed and returned with the RFP form.
 - Hold Harmless Agreement
 - A sworn, notarized Drug Free Work Place Certificate must accompany each Proposal Package or alternate RFP.
 - Public Entity Crimes Form
 - Conflict of Interest Disclosure Form
 - A separate sheet or sheets, clearly identified and numbered, of Exceptions or Deviations from the minimum specifications, must be attached to the Proposal Form (if applicable).
 - A Certificate of Insurability (COI) shall accompany each Proposal or alternate proposal, in the amounts as prescribed by the City.

PART 2 - INTRODUCTION

PURPOSE

The City of Wildwood, Florida ("the CITY") is interested in selecting an Electrical Contractor (Vendor) that can provide the required services pursuant to Section 287.057, Florida Statutes. The City requests that qualified vendors submit letters of interest and proposals for consideration in the selection of an Electrical Contractor. The City may select, or not select, at their sole discretion, any Contractor that the City feels will best address their needs.

The purpose of this RFP is to select a minimum of two (2) qualified licensed electrical contractors to furnish all materials, labor, supervision, transportation, inspections, permits, licenses, equipment, and any incidentals necessary to provide maintenance and miscellaneous electrical services, repairs, installation, and general lighting as needed for the various City facilities.

SELECTION PROCESS

Selection will be based on the criteria as defined within this Request for Proposal. Selection of the Vendor will be in accordance with Florida Statue 287.057, through the following process:

PROPOSALS SUBMISSION FORMAT AND REQUIREMENTS

To be considered, prospective vendors must submit a complete response as required by the RFP checklist of items found in Part 1. Vendor must submit evidence of their ability to provide complete, thorough and comprehensive responses and information for each of the components of the RFP.

GENERAL SELECTION CRITERIA

The CITY's intent is to minimize the cost to vendors who are responding to this request for proposals, therefore you are encouraged to be brief and succinct. Thick volumes of background and general marketing material will not be appreciated and will not carry favor with the reviewers. We are seeking thoughtful, tightly focused proposals that document your vendor's suitability for this services requested.

The services being sought under this RFP are considered to be professional in nature. The Vendors will be evaluated based upon the capabilities of the respondents and will result in an award that is in the best interest of the CITY. Factors to be considered in the evaluation include:

- Capability and Qualifications of the proposer to deliver the proposed services.
- Proven experience as demonstrated with recent contracts/projects for local government agencies within the State of Florida.
- Resources and Availability
- Client References and Past Performance
- Prices Proposed

ADDITIONAL CONDITIONS

- The CITY reserves the right to reject any or all Proposals received, to request additional information, or to extend the deadline for submittals.
- Confidentiality of Documents: Upon receipt of proposals by the CITY, the proposals shall become the property of the CITY without compensation to the proponent, for disposition or usage by the CITY at its discretion. Pursuant to Florida Statute, Section 119.071(1)(b)2, all proposals

submitted shall be subject to review as public records 30 days from opening, or earlier if an intended decision is reached before the 30-days expires.

- **Costs to Prepare Responses:** The CITY assumes no responsibility or obligation to the respondents and will make no payment for any costs associated with the preparation or submission of these proposals.
- **Equal Employment Opportunity:** During the performance of this Contract, the Vendor agrees as follows: The Vendor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin, place of birth, or physical handicap.

EXAMINATION OF PROPOSALS DOCUMENTS

- Each vendor shall carefully examine the Scope of Work and other applicable documents, and inform himself/herself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the CONTRACTOR will in no way relieve him/her of the obligations and responsibilities assumed under the Contract.
- Should a vendor find discrepancies or ambiguities in, or omissions from the Scope of Work, or should he/she be in doubt as to their meaning, he/she shall at once notify the City of Wildwood in writing.

INTERPRETATIONS, CLARIFICATIONS AND ADDENDA

- No oral interpretations will be made to any vendor as to the meaning of the RFP/Contract Documents. Any questions or request for interpretation received IN WRITING by City of Wildwood before the stated deadline, will be given consideration. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, will be distributed prior to the established RFP opening date. Each Vendor shall acknowledge receipt of such addenda in the space provided on the Proposal Form.
- In case any Vendor fails to acknowledge receipt of such addenda or addendum, his/her RFP package will nevertheless be construed as though it had been received and acknowledged and the submission of his/her RFP will constitute acknowledgment of the receipt of same. All addenda are a part of the RFP Documents and each Vendor will be bound by such addenda, whether or not received by him/her. It is the responsibility of each Vendor to verify that he/she has received all addenda issued before the established RFP scheduled deadline.

GOVERNING LAWS AND REGULATIONS

The vendor is required to be familiar with and shall be responsible for complying with all federal, state and local laws, ordinances, rules and regulations that in any manner affect the work.

PREPARATION OF PROPOSAL

Signature of the Vendor: The Vendor must sign the Proposal forms in the space provided for the signature. If the Vendor is an individual, the words "Doing Business As _____," must appear beneath such signature. In the case of a partnership, the signature of at least one of the partners must follow the vendor name and the words, "Member of the Vendor" should be written beneath such signature. If the Vendor is a corporation, the title of the officer signing the RFP on behalf of the corporation must be stated and evidence of his authority to sign the RFP forms must be submitted. The Vendor shall state in the Proposal Form the name and address of each person interested therein.

FISCAL YEAR FUNDING APPROPRIATION

Unless otherwise provided by law, a contract for supplies or services may be entered into for any period of time deemed to be in the best interest of the City of Wildwood, provided the term of the contract and conditions of renewal or extension, if any, are included in the solicitation and funds are available for the fiscal period at the time of the contract. Payment and performance obligations for succeeding fiscal periods shall be subject to appropriation by the City of Wildwood funds thereafter.

When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period, the contract shall be cancelled and the Contractor shall be entitled to reimbursement for the reasonable value of any nonrecurring cost incurred but not advertised in the price of the supplied or services delivered under the contract or otherwise recoverable.

TAX EXEMPT STATUS

The City of Wildwood is a governmental agency under Florida law and exempt from Florida sales tax. The tax exempt number will be provided upon request. This exemption does not apply to goods and services purchased separately by a Contractor in connection with its contract obligations. The Contractor shall be responsible for paying any taxes, fees, or similar payments that are required to be paid in connection with the contract work.

PROTECTION OF RESIDENT WORKERS

The City of Wildwood actively supports the Immigration and Nationality Act (INA) which includes provisions addressing employment eligibility, employment verification, and nondiscrimination. Under the INA, employers may hire only persons who may legally work in the United States (i.e. citizens and nationals of the U.S.) and aliens authorized to work in the U.S. The employer must verify the identity and employment eligibility of anyone to be hired, which includes completing the Employment Eligibility Verification Form (I-9). The Contractor shall establish appropriate procedures and controls so no services or products under the Contract Documents will be performed or manufactured by any worker who is not legally eligible to perform such services or employment. The Contractor must be able to verify an employee's eligibility to work in the U.S. upon demand by the City of Wildwood throughout the duration of the contract.

CITY OF WILDWOOD

The City of Wildwood is a unit of local government and as such reserves the right to reject any and/or all RFP packages, reserves the right to waive any informalities or irregularities in the RFP or examination process, and reserves the right to award the RFP and/or contracts in the best interest of the City of Wildwood.

CONFLICT OF INTEREST DISCLOSURE

Each Respondent shall complete and have notarized the attached disclosure form of any potential conflict of interest that the Respondent may have due to ownership, contracts, or interest associated with this project.

PUBLIC ENTITY CRIMES

Pursuant to Section 287.132 and 287.133 Florida Statutes, the City, as a public entity, may not consider a proposals package from, award any contract to, or transact any business in excess of the

threshold amount set forth in Section 287.017 Florida Statutes with any person or affiliate on the convicted contractor list for the time periods specified unless such person has been removed from the list pursuant to law.

TRUTH IN NEGOTIATIONS

The Respondent certifies to Truth-in- negotiations and the wage rates and other factual unit cost supporting the compensation are accurate, complete, and current at the time of contracting. Further, the original contract amount and any additions thereto shall be adjusted to exclude any significant sums where the City determines the contract price was increased due to inaccurate, incomplete or non-current wage rates and other factual unit costs. Such adjustment must be made within one (1) year following the end of the contract.

RIGHT TO AUDIT RECORDS

The City of Wildwood shall be entitled to audit the books and records of the Contractor or any sub-Contractor to the extent that such books and records relate to the performance of the Agreement or any sub-contract to the Agreement. Such books and records shall be maintained by the Contractor for a period of three (3) years from the date of final payment under the Agreement and by the sub-Contractor for a period of three (3) years from the date of final payment under the sub-contract unless a shorter period is otherwise authorized in writing.

TERM OF CONTRACT

Services performed pursuant to this contract shall commence upon execution of the agreement and continue as necessary to perform and complete all the work required. Duration of the contract shall be for a fixed term or with no time limitation except that the contract must provide a termination clause unless otherwise indicated.

PART 3 - SCOPE OF SERVICES

The City of Wildwood, Florida ("the CITY") is interested in selecting an Electrical Contractor (Vendor) that can provide the required services. The purpose of this RFP is to select a minimum of two (2) qualified licensed electrical contractors to furnish all materials, labor, supervision, transportation, inspections, permits, licenses, equipment, and any incidentals necessary to provide maintenance and miscellaneous electrical services, repairs, installation, and general lighting as needed for the various City facilities. Examples of common services under this agreement will be the installation and repairs of decorative street lights, park lights, installation and/or relocation of electrical outlets, the installation and/or relocation of office lighting, the installation and/or replacement of electrical service panels and disconnects, the electrical service installation and/or replacement of utility lift stations, stormwater lift stations, wastewater pumps and associated devices, re-wiring of existing facilities, etc. All repair work shall be permanent. Contractor may be required to repair, alter, remodel, add to, subtract from, or improve any previous electrical equipment or facility.

Proposers shall provide three (3) references for similar projects/contracts, and proof of a minimum of five (5) years' experience of commercial electrical services.

All preventive maintenance, repair and installation of electrical equipment and performance of electrical services shall be in compliance with the following standards:

- a) American National Standards Institute (ANSI).
- b) Florida Building Code (FBC).
- c) Illuminating Engineering Society of North America (IESNA) handbook, latest edition.
- d) National Electrical Code (NEC).
- e) National Electrical Manufacturers Association (NEMA) - Standards are to be met wherever standards have been established by that agency, and proof is specifically required with material submittals for switchboards, motor control centers, panelboards, cable trays, motors, switches, circuit breakers, and fuses.
- f) Occupational Safety and Health Administration (OSHA).
- g) Photometric data of an independent nationally recognized testing agencies will be accepted. Photometric data of testing laboratories of luminaire manufacturers may be accepted, if certified and approved by the supervisor assigned.
- h) Precast/Prestressed Concrete Institute (PCI) Design Handbook, 5th edition, PCI MNL – 120-99.
- i) Underwriters' Laboratories, Inc. (UL) - This applies to materials which are covered by UL standards.
- j) Conformance with any other applicable local codes and standards.

DESCRIPTION OF WORK

Contractor(s) will furnish all labor and tools necessary for installation, repair, maintenance and/or installation, and/or inspection of electrical infrastructure on a 24 hour basis seven days a week. EMERGENCY RESPONSE TIME shall be no greater than two (2) hours unless otherwise stipulated by City. Time and material pricing, as it may be specified in this bid, shall be on an hourly basis plus the cost of materials plus mark up. Cost per hour shall be non-overtime rate from 7:00 to 5:00 P.M. Monday through Friday and overtime rate from 5:00 P.M. to 7:00 A.M. Monday through Friday and all-day Saturday, Sunday, and City observed holidays. Travel time will not be considered in the calculation of elapsed time.

Contractor must submit documentation to City, with each invoice, including paid invoices to suppliers for the cost of parts and materials along with the costs for labor.

Contractor will be responsible for making all repairs. Other than providing access to City facilities, Contractor should not rely upon City to obtain permits or act as a facilitator between utility companies, outside vendors, and/or manufacturers.

Prior to starting any work or repairs, City may request a detailed budgetary estimate from Contractor for any proposed work. Work may not be started until City directs Contractor to do so by written communication or authorized Purchase Order.

All vendors must have an active phone number and email address to communicate with City. For invoicing purposes, authorized work is considered started when Contractor arrives at the location and will end when the work is completed. City will not pay for travel time.

If requested by City, Contractor must return any damaged parts to City after performing repairs.

Contractor will be allowed to invoice for miscellaneous materials. "Miscellaneous materials" are herein defined as materials that are already owned by Contractor, and are incidentally used to complete the repairs. The cost of miscellaneous materials shall never exceed \$100 per repair. Miscellaneous materials are not intended to be abused by Contractor; therefore, it will require the approval of the Public Works Director. A decision by the Public Works Director pertaining invoicing of miscellaneous materials is final, whether it is in favor or against Contractor. No back up will be required for the invoicing of miscellaneous materials; however, Contractor will be required to list such miscellaneous materials, already owned by his company, and used for the invoiced repairs.

Emergency Repairs:

Contractor, as requested by City representative, will furnish all labor and necessary tools and materials at an established rate from 7:00 A.M. to 5:00 P.M. Monday through Friday. Contractor, as requested by City representative, will furnish all labor and necessary tools and materials at an established overtime rate from 5:00 P.M. to 7:00 A.M. Monday through Friday and all-day Saturday and Sunday. Emergency repairs that are completed under the time and materials guideline will require that Contractor submit attached to the invoice receipts of the materials used to complete the work and a detail breakdown of the job classification and the number of hours worked for each day that it is billed. For emergency repairs, response time shall not exceed two (2) hours from the time the call is placed. In the event Contractor does not respond to City's request for service in a timely manner, as established in this bid, City representative will contact the next contractor in the rotation. Failure to respond three (3) times to the Public Works Director or City designated staff under assigned rotation will constitute failure to perform and may be subject to contract termination.

Scheduled Repairs:

City may request from the selected Contractor, a detailed budgetary cost estimate, to be approved by the Public Works Director to complete any electrical services listed within this bid that the cost does not exceed the City's defined procurement thresholds. In the event that City and Contractor fail to agree on the proposed cost estimate, the Public Works Director will end negotiations and will request a new proposal from the next contractor in the rotation. If due to unforeseen conditions, additional work is required to complete the pre-approved work specified in the cost estimate, the Public Works Director can authorize Contractor to complete the required additional work to be paid at the actual time and cost of materials plus mark up as it is established in the executed contract between CITY and the selected Contractor(s). Work completed under the time and materials guideline will require that Contractor submit attached to the invoice receipts of the materials used to complete the work and a detail breakdown of the job classification and the number of hours

worked for each day that it is billed. In the event Contractor does not respond to City's request to submit a cost estimate in a timely manner, City representative will contact the next contractor, in the rotation, to request a new cost estimate. Failure to respond three (3) times to the Public Works Director under assigned rotation will constitute failure to perform and may be subject to contract termination.

Work Task Procurement Guidelines:

CITY may request a cost estimate proposal for work exceeding the City's defined procurement thresholds that require an invitation to bid from all pre-qualified Contractors for any required electrical services listed in this bid. CITY will select the contractor based on the lowest price submitted.

PART 4 - EVALUATION AND AWARD

RFP EVALUATION

This Request for Proposals includes following all the procedures in this document and sending the sealed RFP information to the City of Wildwood by the due date and time. Once the RFP's are received, the Selection Committee members will independently review each submittal and score each RFP based on the evaluation criteria. All RFP's received in accordance with this Request for Proposals will be evaluated using the following criteria.

Evaluation Scoring Criteria

	Possible Points
Capability and Qualifications of the proposer to deliver the proposed services.	20
Proven experience as demonstrated with recent contracts/projects for local government agencies within the State of Florida.	20
Resources and Availability	20
Client References and Past Performance	20
Prices Proposed	20
Total:	

PROCEDURE REQUIREMENTS

Proposal submittals will be reviewed and ranked by the City's Selection Committee and oral presentations/interviews may be requested from a shortlist of finalists selected by the Committee as a result of their evaluation of the initial Request for Proposals. The Committee will recommend its ranking of the top vendor to the City Commission for approval. The City of Wildwood reserves the right to revise and/or limit the scope of professional services and to reject any and all Proposals.

KEY CONTRACTOR PERSONNEL

In submitting a proposals package, the Respondent is representing that each person listed or referenced in the proposals package shall be available to perform the services described for the CITY OF WILDWOOD, barring illness, accident, or other unforeseeable events of a similar nature in which case the Respondent must be able to promptly provide a qualified replacement. In the event the Respondent wishes to substitute personnel, the Respondent shall propose a person with equal

or higher proposals and each replacement person is subject to prior written CITY OF WILDWOOD approval. In the event the requested substitute person is not satisfactory to the CITY OF WILDWOOD and the matter cannot be resolved to the satisfaction of the CITY OF WILDWOOD, the CITY OF WILDWOOD reserves the right to cancel the contract for cause.

NEGOTIATION

The CITY OF WILDWOOD reserves the right to negotiate any and all elements of this response.

AWARD OF RESPONSE

The CITY OF WILDWOOD reserves the right to reject any or all responses, to waive any minor informality or irregularity in any response, and to make award to the response deemed to be most advantageous to the CITY OF WILDWOOD.

CONFLICT OF INTEREST

If any officer, director, or agent of your organization is also an employee of the City of Wildwood, then you shall clearly identify in your response the name of the individual(s) and the position he or she holds in your organization. Further, you shall disclose the name(s) of any City employee(s) who owns, directly or indirectly, any interest in your organization or any of its branches. This does not include stock in a publicly traded organization unless the individual holds more than a ten- percent (10%) stake. You shall complete and have notarized a Conflict of Interest Form (Form A-1) and include it in your proposals package.

If there is a conflict of interest as defined above and by Florida Statutes, Chapter 112, Part III, Code of Ethics for Public Officers and Employees, then the respondent cannot be considered for award.

RESTRICTED DISCUSSIONS

From the date of issuance of the RFP until final CITY OF WILDWOOD action, the Respondent shall not discuss the RFP or any part thereof with any employee, agent, or representative of the CITY OF WILDWOOD except as expressly authorized by the CITY OF WILDWOOD point of contact identified in this RFP above for this solicitation. Violation of this restriction will result in REJECTION of the Respondent's proposals package.

No negotiations, decisions, or actions shall be initiated or executed by the Respondent as a result of any discussions with any CITY OF WILDWOOD employee. Only those communications that are in writing from the authorized CITY OF WILDWOOD point of contact, Jeremy Hockenbury shall be considered pertinent to this RFP. Only communications from the Respondent that are signed and in writing will be recognized by the CITY OF WILDWOOD as duly authorized expressions on behalf of the Respondent.

AWARD

It is understood that the CITY OF WILDWOOD is not obligated to make an award under or as a result of this RFP or to award such contract. The CITY OF WILDWOOD reserves the right to award such contract, if any, to the best qualified Respondent(s).

The CITY OF WILDWOOD has the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals packages, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the CITY OF WILDWOOD's best interests to do so.

STANDARD INSURANCE REQUIREMENTS

The Contractor shall maintain, on a primary basis and at its sole expense, at all times while performing work for the City of Wildwood, the "Standard Insurance Requirements" described herein. Contractors responding to a Request for Proposal, Request for Qualifications, or an Invitation to Bid shall provide with their submittal, a Certificate of Insurance (COI) or a letter from the insurance company stating required coverage is obtainable. Prior to commencement of any work being done for the City of Wildwood, a COI will be required. Work is defined as any service provided to the City of Wildwood by a vendor/Contractor who must access City property in order to provide the service(s). The requirements contained herein, as well as the City's review or acknowledgement, is not intended to and shall not in any manner limit or qualify the liabilities and obligations assumed by the Contractor under this contract.

Financial Rating of Insurance Companies All insurance companies must have financial rating of **A** or higher by A.M. Best Company, Inc. with the exception of self-insured insurance companies.

Commercial General Liability Insurance The Contractor shall maintain Commercial General Liability Insurance at a limit of liability not less than **\$1,000,000** each occurrence and **\$2,000,000** annual aggregate. Due to the nature of the work involved, Contractors performing program and / or contract management services are required to maintain **\$1,000,000** each occurrence and **\$1,000,000** annual aggregate. The coverage shall not contain any endorsement(s) excluding nor limiting Product/Completed Operations, Independent Contractors, Broad Form Property Damage, X-C-U Coverage, Contractual Liability or Cross Liability. The self-insured retention or deductible shall not exceed \$25,000.

Business Automobile Liability Insurance The Contractor shall maintain Business Automobile Liability Insurance at a limit of liability not less than **\$500,000** each occurrence. Coverage shall include liability for owned, non-owned & hired automobiles. In the event the Contractor does not own automobiles, the Contractor shall maintain coverage for hired & non-owned auto liability, which may be satisfied by way of endorsement to the Commercial General Liability policy or separate Business Auto Liability policy.

Worker's Compensation Insurance & Employers Liability Insurance The Contractor shall maintain its own Worker's Compensation Insurance & Employers Liability in accordance with Florida Statute Chapter 440. **(NOTE: Elective exemptions or coverage through an employee leasing arrangement will be on a case by case basis).**

Umbrella or Excess Liability Insurance (needed for large contracts) The Contractor shall maintain either a Commercial Umbrella or Excess Liability Insurance at a limit of liability not less than **\$2,000,000** each occurrence and **\$2,000,000** aggregate. The Contractor shall endorse the CITY OF WILDWOOD as an "Additional Insured" on the Umbrella or Excess Liability Insurance, unless the Commercial Umbrella/Excess Liability Insurance provides coverage on a pure "True Follow-Form" basis, or the CITY OF WILDWOOD is automatically defined as an additional protected person. Any self-insured retention or deductible shall not exceed \$25,000.

Professional or Errors & Omissions Liability Insurance (when applicable) The Contractor shall maintain a Professional Liability or Errors & Omissions policy at a limit of liability no less than \$2,000,000. The Contractor shall endorse the CITY OF WILDWOOD as an "Additional Insured" on the Professional and/or Errors & Omissions Liability Insurance.

Additional Insured The Contractor shall endorse the CITY OF WILDWOOD as an Additional Insured on the Commercial General Liability Insurance with a CG 2010 Additional Insured – CITYs, Lessees, or Contractors, or CG2026 Additional Insured – CITYs, Lessees, or Contractors –

Scheduled Person or Organization endorsement, or similar endorsement providing equal or broader Additional Insured coverage.

In addition, the Contractor shall endorse the CITY OF WILDWOOD as an Additional Insured under the Contractor's Commercial Umbrella/Excess Liability as required herein.

Indemnification The Contractor shall indemnify and hold harmless the CITY OF WILDWOOD and their elected officials, employees and volunteers from and against all claims, damages, losses and expenses, including legal costs, arising out of or resulting from the performance of this contract, provided that any such claim, damage, loss or expenses is attributed to bodily injury, sickness, disease, personal injury or death, or to injury to or destruction of tangible property including the loss or loss of use resulting there from and is caused in whole or in part by any negligent act or omission of the Contractor. .

Deductibles, Coinsurance Penalties, & Self-Insured Retention The Contractor shall be fully and solely responsible for any costs or expenses as a result of a coverage deductible, coinsurance penalty, or self-insured retention; including any loss not covered because of the operation of such deductible, coinsurance penalty, self-insured retention, or coverage exclusion or limitation. For deductible amounts that exceed the amounts stated herein that are acceptable to the CITY OF WILDWOOD, the Contractor shall, when requested by the CITY OF WILDWOOD, maintain a Commercial Surety Bond in an amount equal to said deductible amount.

Waiver of Subrogation The Contractor shall provide a Waiver of Subrogation in favor of the CITY OF WILDWOOD, Contractor, subcontractor, architects, or engineers for each required policy providing coverage during the life of this Contract. When required by the insurer, or should a policy condition not permit the Contractor to enter into a pre-loss agreement to waive subrogation without an endorsement, then the Contractor shall notify the insurer and request the policy be endorsed with a Waiver of Transfer of Rights of Recovery Against Others, or an equivalent endorsement. This Waiver of Subrogation requirement shall not apply to any policy which includes a condition specifically prohibiting such an endorsement, or voids coverage should the Contractor enter into such an agreement on a pre-loss basis.

Right to Revise or Reject The CITY OF WILDWOOD reserves the right, but not the obligation, to review and revise any insurance requirement, not limited to limits, coverages and endorsements based on insurance market conditions affecting the availability or affordability of coverage; or changes in the scope of work/specifications affecting the applicability of coverage. Additionally, the CITY OF WILDWOOD reserves the right, but not the obligation, to review and reject any insurance policies failing to meet the criteria stated herein, or any insurer(s) providing coverage due to its poor financial condition or failure to operate legally. In such events, the CITY OF WILDWOOD shall provide the Contractor written notice of such revisions or rejections.

No Representation of Coverage Adequacy The coverages, limits or endorsements required herein protect the primary interests of the CITY OF WILDWOOD, and these coverages, limits or endorsements shall in no way be required to be relied upon when assessing the extent or determining appropriate types and limits of coverage to protect the Contractor against any loss exposures, whether as a result of the Project or otherwise.

Certificate(s) of Insurance (COI) The Contractor shall provide the CITY OF WILDWOOD with a COI clearly evidencing that all coverage, limits and endorsements required herein are maintained and in full force and effect. A minimum thirty (30) day endeavor to notify due to cancellation or non-renewal of coverage shall be identified on each Certificate of Insurance. In the event the CITY OF WILDWOOD is notified that a required insurance coverage will cancel or expire during the period of this Contract, the Contractor agrees to furnish the CITY OF WILDWOOD prior to the expiration of such insurance, a new Certificate of Insurance evidencing replacement coverage. When notified by

the CITY OF WILDWOOD, the Contractor agrees not to continue work pursuant to this Contract, unless all required insurance remains in effect.

The CITY OF WILDWOOD shall have the right, but not the obligation, of prohibiting the Contractor from entering the Project site until a new COI is provided to the County evidencing the replacement coverage. The Contractor agrees the CITY OF WILDWOOD reserves the right to withhold payment to the Contractor until evidence of reinstated or replacement coverage is provided to the CITY OF WILDWOOD. If the Contractor fails to maintain the insurance as set forth herein, the Contractor agrees the CITY OF WILDWOOD shall have the right, but not the obligation, to purchase replacement insurance, and the Contractor agrees to reimburse any premiums or expenses incurred by the CITY OF WILDWOOD.

The Contractor agrees the Certificate(s) of Insurance shall:

1. Clearly indicate the CITY OF WILDWOOD has been endorsed on the Commercial General Liability Insurance with a CG 2010 Additional Insured – CITYs, Lessees, or Contractors, or CG 2026 Additional Insured – CITYs, Lessees, or Contractors – Scheduled Person or Organization endorsement, or similar endorsement providing equal or greater Additional Insured coverage.
2. Clearly indicate the CITY OF WILDWOOD is endorsed as an Additional Insured, or Loss Payee, on the Builder's Risk Insurance, and when applicable, Additional Insured on the Commercial Umbrella/Excess Liability Insurance as required herein.
3. Clearly identify each policy's limits, flat & percentage deductibles, sub limits, or self-insured retentions, which exceed the amounts or percentages set forth herein.
4. Clearly indicate a minimum thirty (30) day endeavor to notify requirement in the event of cancellation or non-renewal of coverage.
5. Forward original to and clearly indicate Certificate Holder and Additional Insured as follows:

City of Wildwood
100 N Main Street
Wildwood, FL 34785

The Contractor shall be responsible for all sub-Contractors and their insurance.

All deductibles or self-insured retention shall appear on the certificate(s) and shall be subject to approval by the CITY. At the option of the CITY, the insurer shall reduce or eliminate such deductible or self-insured retention; or the Contractor shall be required to procure a bond guaranteeing payment of losses and related claims expenses.

All insurance companies must be authorized to transact business in the State of Florida.

The CITY shall be exempt from, and in no way liable for, any sums of money which may represent a deductible in any insurance policy. The payment of such deductible shall be the sole responsibility of the Contractor and/or subContractor providing such insurance.

Failure to obtain and maintain such insurance as set out above will be considered a breach of contract and may result in termination of the contract for default.

Neither approval by the CITY of any insurance supplied by the Contractor, nor a failure to disapprove that insurance, shall relieve the Contractor of full responsibility of liability, damages and accidents as

set forth herein.

PART 5 - PROPOSAL DOCUMENTS

ECONOMY OF PRESENTATION

Each proposals package shall be prepared simply and economically, providing a straightforward, concise description of the Respondent's capabilities to satisfy the conditions and requirements of this RFP. Emphasis in each proposals package must be on completeness and clarity of content. To expedite the evaluation of proposals packages, it is mandatory that Respondent follow the format and instructions contained herein. The CITY OF WILDWOOD is not liable or responsible for any costs incurred by any Respondent in responding to this RFP including, without limitation, costs for presentations and/or demonstrations if requested.

PROPOSALS PACKAGE GUIDELINES

To facilitate analysis of its proposals package, the Respondent shall prepare its proposals package in accordance with the instructions outlined in this section and the checklist of items found in Part 1. If the Respondent's proposals package deviates from these instructions, such proposals package may, in the CITY OF WILDWOOD's sole discretion, be rejected.

The CITY OF WILDWOOD EMPHASIZES THAT THE RESPONDENT CONCENTRATE ON ACCURACY, COMPLETENESS, AND CLARITY OF CONTENT

Indexing - Each section may contain a more detailed table of contents to delineate the subsections within that section. Tab indexing shall be used to identify sections.

Page Size and Format - Page size shall be 8.5 x 11 inches, not including foldouts. Pages shall be single-spaced. The text size shall be 11 point or larger. Pages shall be numbered sequentially by section.

Legible tables, charts, graphs and figures shall be used wherever practical to depict organizations, systems and layouts, implementation schedules, plans, etc. These displays shall be uncomplicated, legible and shall not exceed eleven (11) by seventeen (17) inches in size. Foldout pages shall fold entirely within the section, and count as a single page. Foldout pages may only be used for large tables, charts, graphs, diagrams, and schematics; and not for pages of text.

Responses must be limited to eighty (80) pages. Covers, tables of contents and divider tabs will not count as pages, provided no additional information is included on those pages. Work product samples (reports, schedules, etc. provided in response) will not be counted in the eighty (80) page limit. Package the Work Product Samples separately from the Proposal, labeling the sample clearly.

PROPOSALS PACKAGE SECTIONS

The Respondent shall organize its proposals package into the following major sections.

TABLE OF CONTENTS.

Tab A - STATEMENT OF INTEREST: To be submitted on the vendor's letterhead.
The statement of interest shall:

Concisely state the vendor's understanding of the services required by the CITY OF WILDWOOD.

Include additional relevant information not requested elsewhere in the RFP.

The signature on the statement shall be that of a person authorized to represent and bind the vendor.

Tab B. VENDOR PROFILE: Complete Form 1. Attach a copy of the Vendor's current State of Florida, City, or Professional Regulation License to perform business.

Tab C. TEAM COMPOSITION and RESUMES: Provide an organizational chart showing any subcontractors and the relationship to the team. Provide resumes for key team members, not to exceed two pages each. Attach a copy of each person's current Professional Regulation License.

Tab D. BID FORM: Complete Form 2.

Tab E. ILLUSTRATIVE WORK: Complete Form 3. (Form 4 may be reproduced and attached in sequence.)

Tab F. REFERENCES: Provide a minimum of five references for work performed similar to the scope of this RFP. References must be for current, or recent, projects, and must be for the proposed project team members.

Tab G. ADDITIONAL INFORMATION: Provide information describing the Vendor's approach to performing the work advertised in Scope of Services of the RFP. Provide information demonstrating an understanding of the needs of the City of Wildwood. Provide other information that the Vendor deems applicable to this RFP.

Tab H. ADDITIONAL REQUIRED DOCUMENTS: As specified in Part 1 of this RFP, listed within the Proposal Documents Checklist of Items Required to be submitted.

RFP COVER PAGE

Name of Vendor, Entity or Organization:	
Federal Employer Identification Number (FEIN):	
State of Florida License Number (If Applicable):	
Name of Contact Person:	
Title:	
E-Mail Address:	
Mailing Address:	
Street Address (if different):	
City, State, Zip:	
Telephone:	Fax:
Organizational Structure – Please Check One:	
Corporation ☐ Partnership ☐ Proprietorship ☐ Joint Venture ☐ Other ☐	
If Corporation:	
Date of Incorporation:	State of Incorporation:
States Registered in as Foreign Corporation:	
Authorized Signature:	
Print Name: _____	
Signature: _____	
Title: _____	
Phone: _____	
<i>This document must be completed and returned with your Submittal.</i>	

PROPOSER'S CERTIFICATION

Submit To: City of Wildwood 100 N Main Street Wildwood, FL 34785 352-330-1330 352-330-1338 (fax)		CITY OF WILDWOOD REQUEST FOR PROPOSAL (RFP) CERTIFICATION AND ADDENDA ACKNOWLEDGMENT	
DUE DATE:	DUE TIME:	RFP # 2023 - 14	
TITLE: ELECTRICAL SERVICES			
VENDOR NAME:		PHONE NUMBER:	
VENDOR MAILING ADDRESS:		FAX NUMBER:	
CITY/STATE/ZIP:		E-MAIL ADDRESS:	
"I, the undersigned, certify that I have reviewed the addenda listed below (list all addenda received to date). I understand that timely commencement will be considered in award of this RFP and that cancellation of award will be considered if commencement time is not met, and that untimely commencement may be cause for termination of contract. I further certify that the services will meet or exceed the RFP requirements. I, the undersigned, declare that I have carefully examined the RFP, specifications, terms and conditions as applicable for this Request, and that I am thoroughly familiar with all provisions and the quality and type of coverage and services specified. I further declare that I have not divulged, discussed, or compared this RFP with any other Offeror and have not colluded with any Offerors or parties to an RFP whatsoever for any fraudulent purpose."			
_____ Addendum #	_____ Addendum #	_____ Addendum #	_____ Addendum #
"I certify that this quote is made without prior understanding, agreement, or connection with any corporation, vendor, or person submitting an RFP for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this response and that the offer is in compliance with all requirements of the RFP, including but not limited to certification requirements. In conducting offers with an agency for CITY OF WILDWOOD, respondent agrees that if this RFP is accepted, the respondent will convey, sell, assign, or transfer to the City of Wildwood all rights, title and interest in and to all causes of action it may now or hereafter acquire under the anti-trust laws of the United States for price fixing relating to the particular commodities or services purchased or acquired by the CITY. At the City of Wildwood discretion, such assignment shall be made and become effective at the time the purchasing agency renders final payment to the respondent."			
_____ Authorized Agent Name, Title (Print)		_____ Authorized Signature	_____ Date
<i>This form must be completed and returned with your Submittal</i>			

PROPOSALS FORM FOR CITY OF WILDWOOD



Name of Vendor Submitting Proposals _____

Name of Person Submitting Proposals _____

PROPOSER ACKNOWLEDGMENT

"The undersigned hereby declares that he/she has informed himself/herself fully in regard to all conditions to the work to be done, and that he/she has examined the RFP and Specifications for the work and comments hereto attached. The Vendor proposes and agrees, if this submission is accepted, to contract with the City of Wildwood to furnish all necessary materials, equipment, labor and services necessary to complete the work covered by the RFP and Contract Documents for this Project. The Vendor agrees to accept in full compensation for each item the prices named in the schedules incorporated herein."

Signature

Date

RFP Number

[☐] Check if exception(s) or deviation(s) to Specifications. Attach separate sheet(s) detailing reason and type for the exception or deviation.

This document must be completed and returned with your Submittal.

Statement of Terms and Conditions

PUBLIC ENTITY CRIME: A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal/Bid on a contract to provide any goods or services to a public entity, for the construction or repair of a public building or public work, may not submit Proposals/Bids on leases of real property to a public entity, may not be awarded or perform work as a Contractor, supplier, subContractor, or Contractor under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

INDEMNIFICATION: The contractor shall indemnify and hold harmless the City, and its officers and employees, from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorneys' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the design professional and other persons employed or utilized by the design professional in the performance of the contract.

PROHIBITION OF LOBBYING: During the blackout period which is, the period between the time the submittals for Invitation to Bid or the Request for Proposals, or Proposals, or information, as applicable, are received at Contracts / Purchasing and the time the City awards the contract, no proposer, no lobbyist, principal, or other person may lobby, on behalf of a competing party in a particular procurement matter, any member of the City, or any City employee other than the _____. Violation of this provision may result in disapproval of violating party. All questions regarding this Request for Proposals (RFP) or Invitation to Bid (BID) must be submitted in writing to the City's Financial Services Manager.

ANTI TRUST LAWS: By submission of a signed RFP or BID, the successful Vendor acknowledges compliance with all antitrust laws of the United States and the State of Florida, in order to protect the public from restraint of trade, which illegally increases prices.

CONFLICT OF INTEREST: The award of the contract hereunder is subject to the provisions of Chapter 112 of the Florida Statutes. Vendors shall disclose the name of any Officer, Director, Partner, Associate, or Agent who is also an Officer, Appointee, or Employee of any of the City's at the time of the RFP or BID, or at the time of occurrence of the Conflict of Interest thereafter.

INTERPRETATION, CLARIFICATIONS AND ADDENDA: No oral interpretations will be made to any vendor as to the meaning of the RFP/BID Contract Documents. Any inquiry or request for interpretation received by the _____ before the date listed herein will be given consideration. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, will be distributed at or after the Pre-Proposals/Pre-Bid Conference, mailed or sent by available or electronic means to all attending prospective Submitters prior to the established RFP/BID opening date. Each Vendor shall acknowledge receipt of such addenda in the space provided. In case any Proposer/Bidder fails to acknowledge receipt of such addenda or addendum, his offer will nevertheless be construed as though it had been received and acknowledged and the submission of his bid will constitute acknowledgment of the receipt of same. All addenda are a part of the RFP/BID FORMS and each Proposer/Bidder will be bound by such addenda, whether or not received by him. It is the responsibility of each proposer/bidder to verify that he has received all addenda issued before RFP's/BID's are opened. In the case of unit price items, the quantities of work to be done and materials to be furnished under this RFP/BID Contract are to be considered as approximate only and are to be used solely for the comparison of RFP's/BID's received. The City and/or his CONTRACTOR do not expressly or by implication represent that the actual quantities involved will correspond exactly therewith; nor shall the Vendor plead misunderstanding or deception because of such estimate or quantities of work performed or material furnished in accordance with the Specifications and/or Drawings and other Proposals/Bid Documents, and it is understood that the quantities may be increased or diminished as provided herein without in any way invalidating any of the unit or lump sum prices bid.

GOVERNING LAWS AND REGULATIONS: The vendor is required to be familiar with and shall be responsible for complying with all federal, state and local laws, ordinances, rules and regulations that in any manner affect the work.

PROPRIETARY/CONFIDENTIAL INFORMATION: Vendors are hereby notified that all information submitted as part of, or in support of RFP's/BID's, will be available for public inspection ten days after opening of the RFP's/BID's or until a short list is recommended whichever comes first, in compliance with Chapter 119, and 287 of the Florida Statutes. All RFP's/Bids submitted in response to this solicitation become the property of the City. Unless information submitted is proprietary, copy written, trademarked, or patented, the City reserves the right to utilize any or all information, ideas, conceptions, or portions of any RFP/BID, in its best interest.

TAXES: The City of Wildwood is exempt from any taxes imposed by the State and/or Federal Government. Exemption certificates will be provided upon request.

NON-COLLUSION DECLARATION: By signing this RFP/BID, all Vendors shall affirm that they shall not collude, conspire, connive or agree, directly or indirectly, with any other Proposer, vendor, or person to submit a collusive or sham Proposals in connection with the work for which their RFP/BID has been submitted; or to refrain from Bidding in connection with such work; or have in any manner, directly or indirectly, sought by person to fix the price or prices in the RFP/BID or of any other Bidder, or to fix any overhead, profit, or cost elements of the RFP/BID price or the RFP/BID price of any other Bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against any other Bidder, or any person interested in the proposed work.

PROPOSER RESPONSIBILITY: Invitation by the City's to vendors is based on the recipient's specific request or as the result of response by the public to the legal advertisements required by State law. Vendors or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.

CITYSHIP OF SUBMITTALS: All responses, inquiries or correspondence relating to or in reference to this RFP/BID, and all other reports, charts, displays, schedules, exhibits and other documentation submitted by the vendors will become the property of the City. Reference to literature submitted with a previous RFP/BID will not relieve the Bidder from including any required documents with this RFP/BID.

EXAMINATION OF BID DOCUMENTS: Each Bidder shall carefully examine the RFP/BID Document to ensure all pages have been received, all drawings and/or Specifications and other applicable documents are included, and shall inform himself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the CONTRACTOR will in no way relieve him of the obligations and responsibilities assumed under the Contract.

VENDOR RESPONSIBILITY: Vendors are fully and completely responsible for the labeling, identification and delivery of their submittals. The _____ will not be responsible for any mislabeled or misdirected submissions, nor those handled by delivery persons, couriers, or the US Postal Service.

DRUG FREE WORKPLACE: All Proposers/Bidders shall submit the enclosed, duly signed and notarized form entitled "Drug Free Workplace Certificate". The Drug Free Workplace Vendor shall have the burden of demonstrating that his program complies with Section 287.087 of the Florida Statutes, and any other applicable state law.

THE CITY OF WILDWOOD, is a political subdivision of the State of Florida, and reserves the right to reject any and/or all submittals, reserve the right to waive any informalities or irregularities in the examination process, and reserve the right to award contracts and/or in the best interest of the City. Submittals not meeting stated minimum terms and proposals may be rejected by the City as non-responsive. The City reserves the right to reject any or all submittals without cause. The City reserves the right to reject the submission of any Vendor in arrears or in default upon any debt or contract to the City, or who has failed to perform faithfully any previous contract with the City's or with other governmental agencies.

PUBLIC RECORDS LAW: Correspondence, materials and documents received pursuant to this RFP/BID become public records subject to the provisions of Chapter 119, Florida Statutes.

VERIFICATION OF TIME: Next time is hereby established as the Official Time of the City's.

PREPARATION OF PROPOSALS/BIDS:

Signature of the Bidder: The Bidder must sign the RFP/BID FORMS in the space provided for the signature. If the Proposer/Bidder is an individual, the words "doing business as _____" must appear beneath such signature. In the case of a partnership, the signature of at least one of the partners must follow the vendor name and the words, "Member of the Vendor" should be written beneath such signature. If the Proposer/Bidder is a corporation, the title of the officer signing the RFP/BID on behalf of the corporation must be stated and evidence of his authority to sign the RFP/BID must be submitted. The Proposer/Bidder shall state in the RFP/BID FORMS the name and address of each person interested therein.

Basis for Bidding: The price proposed for each item shall be on a lump sum or unit price basis according to specifications on the RFP/BID FORM. The proposed prices shall remain unchanged for the duration of the Contract and no claims for cost escalation during the progress of the work will be considered, unless otherwise provided herein.

Total Proposed Price/Total Contract Sum Proposed: If applicable, the total price bid for the work shall be the aggregate of the lump sum prices proposed and/or unit prices multiplied by the appropriate estimated quantities for the individual items and shall be stated in figures in the appropriate place on the RFP/BID FORM. In the event that there is a discrepancy on the RFP/BID FORM due to unit price extensions or additions, the corrected extensions and additions shall be used to determine the project bid amount.

TABULATION: Those wishing to receive an official tabulation of the results of the opening of this RFP/BID are to submit a self-addressed, stamped business size (No. 10) envelope, prominently marked on the front lower left side, with the RFP identification. Tabulation requested by telephone, fax or electronic media will not be accepted.

OBLIGATION OF WINNING BIDDER: The contents of the RFP/BID of the successful proposer/bidder will become contractual obligations if acquisition action ensues. Failure of the successful Proposer/Bidder to accept these obligations in a contract may result in cancellation of the award and such vendor may be removed from future participation.

AWARD OF BID: It is the City's intent to select a vendor within **sixty (60) calendar days** of the deadline for receipt of Proposals/Bids. However, Proposals/Bids must be vendor and valid for award for at least **ninety (90) calendar days** after the deadline for receipt of the RFP/BID.

ADDITIONAL REQUIREMENTS: The vendors shall furnish such additional information as the City may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The City reserves the right to make investigations of the proposals of the vendor as it deems appropriate.

PREPARATION COSTS: The City shall not be obligated or be liable for any costs incurred by Proposers/Bidders prior to issuance of a contract. All costs to prepare and submit a response to this RFP/BID shall be borne by the Proposer/Bidder.

TIMELINESS: All work will commence upon authorization from the City's representative. All work will proceed in a timely manner without delays. The Contractor shall commence the work UPON RECEIPT OF NOTICE TO PROCEED and/or ORDER PLACED (PURCHASE ORDER PRESENTED), and shall deliver in accordance to the terms and conditions outlined and agreed upon herein.

DELIVERY: All prices shall be FOB Destination, Sumter County, Florida, inside delivery unless otherwise specified.

ADDITIONAL SERVICES/PURCHASES BY OTHER PUBLIC AGENCIES ("PIGGY-BACK"):

The Vendor by submitting a Bid acknowledges that other Public Agencies may seek to "Piggy-Back" under the same terms and conditions, during the effective period of any resulting contract – services and/or purchases being offered in this Bid, for the same prices and/or terms proposed. Vendor has the option to agree or disagree to allow contract Piggy-Backs on a case-by-case basis. Before a Public Agency is allowed to Piggy-Back any contract, the Agency must first obtain the vendor's approval – without the vendor's approval, the seeking Agency cannot Piggy-Back.

PLANS, FORMS & SPECIFICATIONS: Bid Packages are available from the _____. These packages are available for pickup or by mail. If requested to mail, the Proposer/Bidder must supply a courier account number (UPS, FedEx, etc.). Proposers/Bidders are required to use the official RFP/BID FORMS, and all attachments itemized herein, are to be submitted as a single document. Any variation from the minimum specifications must be clearly stated on the RFP/BID FORM and/or Exceptions/Deviations Sheet(s). Only one set of plans, forms, and specifications will be furnished each company or corporation interested in submitting a Proposals/bid. RFP/BID FORM documents for this project are free of charge and are available on-line and are downloadable.

MANUFACTURER'S NAME AND APPROVED EQUIVALENTS: Any manufacturer's names, trade names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition unless otherwise indicated. The Proposer/Bidder may offer any brand for which he is an authorized representative, which meets or exceeds the RFP/BID specification for any item(s). If RFP's/BID's are based on equivalent products, indicate on the RFP/BID FORM the manufacturer's product name and literature, and/or complete specifications. Reference to literature submitted with a previous RFP/BID will not satisfy this provision. The Proposer/Bidder shall explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. RFP's/BID's which do not comply with these requirements are subject to rejection. RFP's/BID's lacking any written indication of intent to quote an alternate brand will be received and considered in complete compliance with the specifications as listed on the RFP/BID FORM. The _____ is to be notified, in writing, of any proposed changes in materials used, manufacturing process, or construction. However, changes shall not be binding upon the City unless evidenced by a Change Notice issued and signed by the _____, or designated representative.

QUANTITIES: The quantities as specified in this RFP/BID are estimates only and are not to be construed as guaranteed minimums.

SAMPLES: Samples of items, when called for, shall be furnished free of expense, and if not destroyed may, upon request, be returned at the Proposer's/Bidder's expense. Each sample shall be labeled with the Proposer's/Bidder's name, manufacturer brand name and number, RFP/BID number and item reference. Samples of successful Proposer's/Bidder's items may remain on file for the term of the contract. Request for return of samples shall be accompanied by instructions which include shipping authorization and must be received at time of opening. Samples not returned may be disposed of by the City within a reasonable time as deemed appropriate.

DOCUMENT RE-CREATION: Vendor may choose to re-create any document(s) required for this solicitation, but must do so at his own risk. All required information in the original City format must be included in any re-created document. Submittals may be deemed non-responsive if required information is not included in any re-created document.

ACKNOWLEDGED:

*This document must be completed and returned with your
Submittal.*

(Signature and Date)

HOLD HARMLESS AGREEMENT

The Contractor agrees to hold the City of Wildwood harmless against all claims for bodily injury, sickness, disease, death or personal injury or damage to property or loss of use resulting there from, arising out of the agreement, to the extent that such claims are attributable, in whole or in part, to a negligent act or omission by the Contractor.

The Contractor shall purchase and maintain workers' compensation insurance for all workers' compensation insurance and employers' liability in accordance with Florida Statute Chapter 440.

The Contractor shall also purchase any other coverage required by law for the benefit of employees.

Required insurance shall be documented in Certificates of Insurance and shall be provided to the City representative requesting the service.

By signature upon this form the Contractor stipulates that he/she agrees to the Hold Harmless Agreement, and to abide by all insurance requirements.

Contractor/ Vendor-Print Name

Signature

Project Name

Date

The effective date of this Hold Harmless Agreement shall be for the duration of this project.

This document must be completed and returned with your Submittal.

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that,

(print or type name of vendor)

- Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
- Informs employees about the dangers of drug abuse in the work place, the vendor's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
- Gives each employee engaged in providing commodities or contractual services that are under RFP or bid, a copy of the statement specified above.
- Notifies the employees that as a condition of working on the commodities or contractual services that are under RFP or bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, please or guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
- Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.
- "As a person authorized to sign this statement, I certify that the above named business, vendor or corporation complies fully with the requirements set forth herein".

Authorized Signature

Date Signed

State of: _____

County of: _____

Sworn to and subscribed before me this _____ day of _____, 20__

Personally known _____ or Produced Identification _____
(Specify Type of Identification)

Signature of Notary

My Commission Expires _____

(seal)

This document must be completed and returned with your Submittal.

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR
OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

entity submitting this sworn statement. {indicate which statement applies.}

_____ Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. **{attach a copy of the final order}**

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

{signature}

{date}

State of _____

County of _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, _____, who after first being sworn by me, affixed his/her signature in the space provided above on this _____ day of _____, 20__.

Attest: _____

Notary Public

My commission expires: _____

(Notary Seal)

This document must be completed and returned with your Submittal.

Conflict of Interest Disclosure Form

I HEREBY CERTIFY that

2. I (*printed name*) _____ am the
(*title*) _____ and the duly authorized representative of the vendor of (*Vendor*
Name) _____ whose address is
_____, and that I possess the legal authority to make this affidavit on behalf of myself and the
vendor for which I am acting; and,

2. Except as listed below, no employee, officer, or agent of the vendor have any conflicts of interest, real or apparent, due to ownership, other clients, contracts, or interests associated with this project; and,

3. This bid proposal is made without prior understanding, agreement, or connection with any corporation, vendor, or person submitting a bid proposal for the same services and is in all respects fair and without collusion or fraud.

EXCEPTIONS (List)

Signature: _____

Printed Name: _____

Vendor Name: _____

Date: _____

State of _____

County of _____

Sworn to and subscribed before me this _____ day of _____ 20____

Personally Known _____

OR Produced Identification _____, Type of Identification _____

My Commission Expires _____

(Printed, typed or stamped commissioned name of notary)

This document must be completed and returned with your Submittal

FORM 1

VENDOR PROFILE

Submitted by (*Company Name*):

Corporation

Partnership

Individual

Joint Venture

Other

Describe:

Florida Electrical Contractor License Number:

Expiration Date:

Office Location:

Number of people in your organization:

Length of time the Contractor has been doing business under this name in Florida:

years

Length of time your firm has provided electrical services to governmental clients:

years

Under what other name(s) has your firm operated:

Has or is your firm currently involved in any formal court proceedings regarding any of your electrical contracts?

YES

(*attach a detailed explanation*)

NO

FORM 2

BID FORM

Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by City for the duration of the three (3)-year term contract.

JOB CLASSIFICATION	REGULAR HOURS HOURLY RATE	AFTER HOURS HOURLY RATE
Master Electrician	\$	\$
Journeyman/Supervisor	\$	\$
Apprentice/Laborer	\$	\$
Permit Fee Reimbursement	<u>At Actual Cost</u>	

EQUIPMENT WITH OPERATOR	HOURLY RATE
Bucket Truck or Lift	\$
Auger w/ Pole Setter	\$
Trencher	\$
	\$
	\$

PARTS & MATERIALS MARK-UP	PERCENTAGE
Percentage (Not to exceed 10%)	%

Notes:

1. "After Hours" price shall not exceed two times that of the normal operating price.
2. Contractors will bill for parts and materials at wholesale cost + percentage mark-up in an amount not to exceed 10 percent. Supplier invoices must be attached to all invoices as applicable.
3. Costs for additional equipment rates can be included in rows provided under EQUIPMENT WITH OPERATOR table.

If requested by City, Contractor must return any damaged parts to City after performing repairs.

Authorized Signatory:

(Signature)

Title:

FORM 3

ILLUSTRATIVE WORK

Work by vendor best illustrates current proposals relevant to the RFP that have been/is being accomplished by personnel that shall be assigned to the City. List no more than five (5) projects.

<u>Project Name & Location</u> <u>Project Manager:</u>		Client's Name & Address
Completion Date (Actual or Estimated):		
Contractor Fees (In Thousands)		<u>Client Contact Name, Title, Email Address and Telephone Number:</u>
Entire Project: \$	Work for which vendor was/is responsible: \$	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible)		
<u>Nature of Vendor's Responsibility in Project</u> (Please give quantitative indications wherever possible)		
<u>Vendor's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the City's Project</u>		

Immigration Affidavit Certification

This Affidavit is required and should be signed, notarized by an authorized principal of the firm, and submitted with formal Invitations to Bid (ITB's) and Request for Proposals (RFP) submittals. Further, Consultants / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment, at the time of the submission of the Consultant's/bidder's proposal. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company. Failure to include this Affidavit and acceptable evidence of enrollment in the E-Verify program may deem the Consultant / Bidder's proposal as nonresponsive.

The City of Wildwood will not intentionally award City contracts to any Consultant who knowingly employs unauthorized alien workers, constituting a violation of the employment provision contained in 8 U.S.C. Section 1324 a(e) Section 274A(e) of the Immigration and Nationality Act ("INA").

The City of Wildwood may consider the employment by any Consultant of unauthorized aliens a violation of Section 274A (e) of the INA. Such Violation by the recipient of the Employment Provisions contained in Section 274A (e) of the INA shall be grounds for unilateral termination of the contract by the City of Wildwood.

Consultant attests that they are fully compliant with all applicable immigration laws (specifically to the 1986 Immigration Act and subsequent Amendment(s)) and agrees to comply with the provisions of the Memorandum of Understanding with E-Verify and to provide proof of enrollment in The Employment Eligibility Verification System (E-Verify), operated by the Department of Homeland Security in partnership with the Social Security Administration at the time of submission of the Consultant's / Bidder's proposal.

Company Name: _____

Print Name: _____ Title: _____

Signature _____ Date: _____

State of _____ County of _____

The foregoing instrument was signed and acknowledged before me this _____ day of _____, 20____, by

_____ who has produced _____ as identification.
(Print or Type Name) (Type of Identification and Number)

Notary Public Signature

Printed Name of Notary Public

Notary Commission Number/Expiration

The signee of this affidavit guarantees, as evidenced by the affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

CONTRACT
SAMPLE PROFESSIONAL SERVICES AGREEMENT

(Sample agreement only. The CITY reserves the right to alter this agreement based on final RFP results and/or any negotiations with proposed Vendor.)

THIS AGREEMENT is made this _____ day of _____, 2023, by and between City of Wildwood (hereafter referred to as "City"), whose address is 100 N Main Street, Wildwood, Florida 34785, and (hereafter referred to as "Contractor"), whose address is _____

WHEREAS, the City has need of professional services for Electrical Services and

WHEREAS, the parties desire to enter into a written agreement outlining the duties, responsibilities and compensation of Contractor, based on the Contractor's response to RFP # 2023- 14 – Request for Proposals for Electrical Services

NOW, THEREFORE, in consideration of the mutual covenants and agreements contained herein, it is hereby agreed as follows:

1. The relationship of the Contractor to the City will be that of a professional contractor to provide the professional and technical services required under this agreement in accordance with acceptable professional practices and ethical standards applicable to the Contractor's profession, and Contractor will endeavor to provide to the City prompt and efficient services to the best of its ability.
2. Contractor is hereby retained and employed as the Electrical Services Contractor, and will work with the City to provide said services in accordance with the scope of services outlined in RFP # 2023-14.
3. Contractor agrees to prepare and complete a report to the City, detailing the status of services provided pursuant to this Agreement at least ninety (90) days prior to the expiration of the term of this Agreement, or at least ninety (90) days prior to the expiration of any renewal term of this Agreement. Contractors may be asked to present the deliverables in person for review by staff or for discussion at a scheduled City Commission meeting.
4. The term of this Agreement shall commence on _____ and continue in full force through _____, unless otherwise terminated as provided in paragraph five (5) of this Agreement. This Agreement may be renewed on an annual basis for additional consecutive one-year periods, if agreed to in writing by both parties, at least sixty (60) days prior to the expiration of this Agreement, including any periods of renewal. The term of this Agreement does not relieve the Contractor of any future responsibility as described in paragraph eight (8) of this Agreement.
5. This Agreement may be terminated by either party upon thirty (30) days prior written notice to the other party at the address designated in this Agreement for receiving such notice. If this agreement is terminated, Contractor shall be authorized to receive payment for all work performed up to the date of termination.
6. With regard to compensation paid to Contractor, Contractor shall furnish to the City on a monthly basis an itemized invoice detailing all of Contractor's hours, services, expenses and any other services utilized by the City during the preceding month. Invoice shall be itemized pursuant to and in accordance with the attached Fee Schedule. The contractor shall compute the total amount due for the preceding month and all amounts due. Contractor shall be paid on a monthly basis pursuant to the provisions of the Local Government Prompt Payment Act, F.S. 218. The contractor acknowledges and agrees that the rates set forth in the Fee Schedule shall remain fixed throughout the duration of the Agreement and thereafter shall only be adjusted by mutual written agreement of both parties.
7. General Considerations.

- a. All reports, drawings, designs, specifications, notebooks, computations, details, and calculation documents prepared by the Contractor and presented to the City pursuant to this Agreement are and remain the property of the City as instruments of service.
- b. All analyses, data, documents, models, modeling, reports, and tests performed or utilized by Contractor shall be made available to the City upon request and shall be considered public records, pursuant to F.S. 119.0701.
- c. Contractor shall keep all books, records, files, drawings, plans and other documentation, including all electronically stored items, which concern or relate to the services required hereunder, for a minimum of three (3) years from the date of expiration or termination of this Agreement, or as otherwise required by any applicable law, whichever date is later. The City shall have the right to order, inspect and copy all such Records as often as it deems necessary during any such period of time. The right to audit, inspect, and copy records shall include all of the records of sub-Contractors (if any).
- d. Contractor shall, at all times, comply with the Florida Public Records Law, the Florida Open Meeting Law and all other applicable laws, rules and regulations of the State of Florida.
- e. Contractor shall, at all times, carry Professional Liability, General Liability, Automobile and Worker's Compensation Insurance pursuant to the insurance requirements in RFP # 2019-02, naming City as an additional insured in each such policy.
- f. Upon Contractor's written request, the City will furnish, or cause to be furnished, such reports, studies, instruments, documents, and other information as Contractor and City mutually deem necessary, and Contractor may rely upon same in performing the services required under this agreement.
- g. The City and Contractor each binds itself and its successors, legal representatives and assigns to the other party to this agreement and to the partners, successors, legal representatives and assigns of such other party to this agreement, in respect to all covenants of this agreement; and neither the City nor Contractor shall assign or transfer their interest in this agreement without the prior written consent of the other party.

8. Should any other professional services be called for by the City which are not otherwise set forth in this Agreement or any of its attachments or exhibits, said charges shall be agreed upon in advance by the parties hereto. The Contractor may be required to provide additional services to the City on challenges, public protests, administrative hearings or similar matters. The Contractor shall be available to represent the City, serve as an expert witness and provide supporting documentation as necessary.

9. The Contract Documents, which comprise the entire Contract between City and Contractor and which are further incorporated herein by reference, consist of the following:

- a. Request for Proposals (RFP)
- b. Vendor's RFP Documents
- c. Permits / Licenses
- d. All RFP Addenda Issued Prior to RFP Opening Date
- e. All Modifications and Change Orders Issued
- f. Services hourly rates, as attached to this contract.

10. The Contractor agrees to indemnify and hold harmless the City of Wildwood, and their elected officials, employees and volunteers from and against all claims, losses and expenses, including legal costs, arising out of or resulting from, the performance of this contract, provided that any such claims, damage, loss of expenses is attributed to bodily injury, sickness, disease, personal injury or death, or to injury to or destruction of tangible property including the loss or loss of use resulting there from and is caused in whole or in part by any negligent act or omission of the Contractor.

11. Contractor, its agents, servants or employees shall, in no manner, whatsoever be construed as the employees, agents, servants or representatives of the City and shall have not expressed or implied power or authority to act in any manner whatsoever for or on behalf of the City, except as provided in the scope of services called for herein. Contractor is hereby designated as an independent contractor to the City and none of the employees, agents or servants of the Contractor shall have, or be entitled to, any of the fringe benefits applicable to employees of the City.

12. In the event of default by either party hereto, the defaulting party shall be liable for all costs and expenses, including reasonable attorney's fees and costs incurred by the other party in enforcing it's rights hereunder, whether litigation be instituted or not, at the trial court and appellate court level.
13. Contractor does hereby waive any and all "venue privilege" and or "diversity of citizenship privileges" and specifically agrees that any action brought for the enforcement, construction or interpretation of this agreement shall be maintained in the County or Circuit Court in and for Sumter County, Florida, and Contractor hereby specifically waives its right or privilege to institute any action of any kind or nature whatsoever, against the City in any other State Court, Federal Court or administrative tribunal.
14. This Agreement represents the entire and integrated agreement between the parties and supersedes all prior negotiations, representations or agreements, either written or verbal. If any provision of this Agreement is declared to be invalid or unenforceable, the remainder shall continue to operate in full force and effect.
15. This Agreement cannot be changed or modified, unless by written agreement signed by all parties hereto.
16. In performing services hereunder, Contractor shall comply with all federal, state and local laws and regulations. Contractor shall be responsible for identifying and obtaining all permits necessary to complete the scope of services. Contractor shall be responsible for obtaining, at its sole cost and expense, all necessary licenses and other governmental approvals required in order for Contractor to provide the type of services required hereunder.
17. Contractor shall immediately notify City in writing of any commitments during the term of this Agreement which may constitute a potential or actual conflict of interest with respect to the scope of services to be performed for the City.
18. Each of the WHEREAS clauses listed above are hereby re-alleged and incorporated into this Agreement as if otherwise fully stated herein.
19. Any notices required by this Agreement shall be mailed to the following individual(s), by Certified Mail, Return Receipt requested:

FOR THE CITY

FOR THE CONTRACTOR

Name: Jason McHugh

Name: _____

Address: 100 N Main Street, Wildwood, FL 34785

Address: _____

Title: City Manager

Title: _____

Date: _____

Date: _____

IN WITNESS WHEREOF, the parties have signed this agreement the day and year first above written.

ATTEST:

CITY OF WILDWOOD

By: _____

By: Ed Wolf, Mayor

Date Signed: _____

ATTEST:

Contractor

By: _____

By: _____

Date Signed: _____

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Pleasantdale Drive Roadway Rehabilitation Project Change Order No. 1 in the Amount of \$25,316.20

REQUESTED ACTION: Staff recommends approval.

CONTRACT: Vendor/Entity: DB Civil Construction, LLC
Effective Date: Termination Date:
Managing Division/Department:

BUDGET IMPACT: Funding is available in account 301-541-60-6301 (Pleasantdale Rehab).

HISTORY/FACTS/ISSUES:

DB Civil Construction, LLC was awarded the Pleasantdale Drive Roadway Rehabilitation Project to improve the potable water system, stormwater, and roadway conditions. Following the pre-construction meeting, a potential conflict was identified in the plans and Kimley-Horn and Associates, Inc. proceeded to make the necessary plan revisions to mitigate sewer lateral conflicts with the proposed new stormwater trunk line. The revised plans lowered the stormwater line by approximately 1.5 to 2 feet to limit potential sanitary service disruption to the adjacent residents. DB Civil Construction reviewed the revised plans and requested modification to the original bid proposal through Change Order No. 1 for additional costs associated with the plan revision.

Kimley-Horn has reviewed the request and has confirmed that there are additional costs associated with installing the deeper stormwater trunk line under the existing sanitary laterals. They have indicated that the construction operations for the revised plan specifications will require additional trench shoring, equipment, and labor costs.



MEMORANDUM

To: Mr. Jeremy Hockenbury, City of Wildwood Public Works Director

From: Nicholas J. Mora, P.E.; Kimley-Horn and Associates, Inc.

Date: June 19, 2023

RE: ***Pleasantdale Drive Improvements – Review of Change Order No. 1
Kimley-Horn Project Number 142173388***

As requested, Kimley-Horn assessed Change Order No. 1 submitted by DB Civil Construction, LLC (DBCC) for the Pleasantdale Drive Improvements project. The subject change order is associated with the recent plan revision generated by Kimley-Horn which lowered the proposed stormwater trunk line by 1.5-feet to 2-feet throughout the project limits to avoid conflicts with sewer laterals.

Within the change order, DBCC increased its unit price for stormwater pipe based on the following reasons:

1. A slower production rate will be experienced due to needing to dig deeper and install pipe under sewer laterals. With the increased depth, a trench box shoring operation and a larger excavator will be required.
2. Unknown soil conditions and potential for materials that are unsuitable for pipe bedding may be encountered.

Kimley-Horn discussed Item No. 2 above with DBCC and explained that roadway coring data obtained during design suggests that it is not likely that unsuitable pipe bedding materials will be encountered. DBCC acknowledged this and included a contingency unit price and quantity for the removal of unsuitable materials and replacement with suitable backfill material. Should no unsuitable materials be encountered, this pay item will not apply or be charged for.

Kimley-Horn recommends approval of Change Order No. 1 (dated June 15, 2023) for an associated cost of \$25,316.20. As described above, the cost increase may be less than \$25,316.20 if no unsuitable materials are encountered.

DB Civil Construction LLC

REQUEST FOR CHANGE ORDER

Plan Revisions Dated 06/01/2023

To: **City of Wildwood**
Project: **Pleasantdale Drive Improvements**

CO#: **1**
Date: **6/15/2023**

The plan revision involved design changes to the drainage system. The new design lowered the pipe and structure inverts and deltes the conflict manholes. Lowering the inverts will add additional labor, equipment, and material cost. This change order will adjust the contract to match the new design. DBCC is requesting this added cost be add to our contract amount, plus an additional 20 days of contract time.

DEDUCT ORIGNAL DRAINAGE BASED ON 4-5' AVG DEPTH

15	TYPE P-6 MOD CURB INLET (<10')	6	EA	\$8,200.00	\$49,200.00
16	TYPE P-3 CURB INLET (<10')	1	EA	\$8,000.00	\$8,000.00
17	MANHOLES, P-8 (<10')	2	EA	\$6,000.00	\$12,000.00
18	UTILITY CONFLICT MANHOLE	3	EA	\$11,000.00	\$33,000.00
19	PIPE, OPTIONAL MATERIAL (ROUND) (18' SD)	1188	LF	\$100.00	\$118,800.00
				DEDUCT	\$221,000.00

ADD REVISED DRAINAGE BASED ON 6-7' AVG DEPTH

10	EXCAVATION, REGULAR	20	CY	\$22.00	\$440.00
	<i>(Based on contract unit price)</i>				
15	TYPE P-6 MOD CURB INLET (<10')	6	EA	\$9,580.00	\$57,480.00
	<i>(Additional material, labor, shoring, dewatering, cost)</i>				
16	TYPE P-3 CURB INLET (<10')	1	EA	\$9,380.00	\$9,380.00
	<i>(Additional material, labor, shoring, dewatering, cost)</i>				
17	MANHOLES, P-8 (<10')	1	EA	\$7,380.00	\$7,380.00
	<i>(Additional material, labor, shoring, dewatering, cost)</i>				
18	WEIR MANHOLE STRUCTURE	1	EA	\$10,980.00	\$10,980.00
	<i>(Additional cost)</i>				
19	PIPE, OPTIONAL MATERIAL (ROUND) (18' SD)	1196	LF	\$120.95	\$144,656.20
	<i>(Additional labor, shoring, dewatering, cost)</i>				
19A	SEWER LATERIAL CONFLICT SUPPORT	15	EA	\$905.00	\$13,575.00
	<i>(Additional cost)</i>				
19b	UNSUITABLE PIPE TRENCH EXCAVATION & BACKFILL	50	CY	\$48.50	\$2,425.00
	<i>(Additional Contengency Cost)</i>				
				ADD	\$246,316.20

TOTAL ADDITIONAL COST \$25,316.20

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: **National Flood Insurance Program (NFIP) Floodplain Management Regional Plenary and Community Assistance Visits Update**

REQUESTED ACTION:

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

On April 25, 2023, I represented the City of Wildwood in the Office of Floodplain Management's (OFM) full-day, interactive regional floodplain management engagement meeting.

Additionally, I met with state representatives to discuss and evaluate the state's floodplain management objectives as they relate to the City of Wildwood in a one-on-one meeting during the Community Assistance Visit (CAV). Discussion topics included flood insurance issues, claims procedures, and permitting after disasters and recovery from flood disasters.

Much discussion was held on existing flood zone categories within the city limits as well as possible contributing factors to any existing areas of sporadic flooding.

As noted in the attached plenary report and transmittal/closure letter, the City of Wildwood has addressed any matters of concern identified by the OFM during the CAV process. Furthermore, the OFM's evaluation of the City's Floodplain Management Program confirms that the City effectively implements its floodplain management program.

The OFM has officially closed the CAV investigation and reported to the Federal Emergency Management Agency (FEMA) that the City has a compliant floodplain management program and is deemed eligible to continue its participation in the National Flood Insurance Program (NFIP).

Melanie Peavy, AICP, CPM
Development Services Director

Florida's NFIP State Coordinating Office Regional Engagement Community Assistance Visit



PLENARY AND COMMUNITY ASSISTANCE VISIT REPORT

City of Wildwood, Florida

June 16, 2023

These communities participated in the Plenary session and Concurrent CAV meetings:

Astatula	Bellevue	Brooksville	Bushnell
Center Hill	Citrus County	Coleman	Crystal River
Dunnellon	Eustis	Fruitland Park	Hernando County
Inverness	Lady Lake	Lake County	Leesburg
Marion County	McIntosh	Minneola	Mt. Dora
Ocala	Sumter County	Tavares	Umatilla
Webster	Wildwood		

Office of Floodplain Management
Bureau of Mitigation
Florida Division of Emergency Management

TABLE OF CONTENTS

Contents

TABLE OF CONTENTS.....	2
1. THE SCORE-CAV PROCESS.....	1
1.1 General.....	1
1.2 Purpose.....	1
1.3 CAV Structure	1
2. INDIVIDUAL ONE-ON-ONE COMMUNITY MEETING REPORT	3
Wildwood, City of – Sumter County, NFIP ID 120299.....	3
2.1 SCORE CAV Concurrent Meeting Participants and Contact Information	3
2.2 Community’s Floodplain Management Program Background and Overview	3
2.3 SCORE CAV Findings about the Community.....	4
2.3.1 Problems with the Community’s Floodplain Management Regulations? None.....	4
2.3.2 Problems with Community’s Administration/Enforcement Procedures? None	4
2.3.3 Engineering or Other Problems with FIRMs or FIS? None.....	5
2.3.4 Problems in the Community’s Floodplain Management Program? None.....	5
2.3.5 Programmatic Issues Identified? None.....	5
2.3.6 Potential Violations – Community Actions Required: No.....	5
3. SCORE-CAV PRESENTATION AND PLENARY DISCUSSION.....	7
3.1 OFM Initiatives and Community Floodplain Management.....	7
3.2 Flood Ordinances	8
3.3 Florida Building Code 6th Edition.....	9
3.4 Mapping	10
3.5 Permitting.....	11
3.6 Virtual Tour of Floodplain Development.....	12
3.7 Violations & Enforcement	12
3.8 Post Disaster Roles and Responsibilities.....	14
3.9 Mitigation Strategies.....	16
3.10 Flood Insurance.....	17
3.11 Community Rating System	18
3.12 Meeting Wrap-Up	19

PART 1: INTRODUCTION

1. THE SCORE-CAV PROCESS

1.1 General

Florida's Office of Floodplain Management (OFM) conducted its State Coordinating Office Regional Engagement Community Assistance Visit (SCORE-CAV) in your area to efficiently interact with and engage communities in discussing floodplain management issues, ideas, and solutions unique to regions established based on geographic areas of the state. Using a three-tiered approach, the OFM conducted floodplain tours of each community, hosted a six-hour plenary session, and met one-on-one with participating communities to discuss issues pertaining to each community's floodplain management program and compliance matters.

1.2 Purpose

The purpose of the SCORE-CAV plenary session is threefold: 1) increase interaction between the State and local floodplain administrators (FPAs), 2) encourage the sharing of ideas, solutions, and strategies for floodplain management within the region, and 3) present common messages to create a greater awareness of the National Flood Insurance Program (NFIP) and its requirements. The intended longer-range objective is to forge better communication and coordination between communities in the regions and provide better mutual support, particularly following disasters. The OFM conducts one-on-one community visits to assess their floodplain management programs and overall knowledge of the NFIP. In doing so, OFM staff provide community staff with any technical assistance in general or specifically relating to identified program deficiencies and develop strategies for resolving compliance issues and improving flood resiliency in communities.

1.3 CAV Structure

The SCORE-CAV process consists of a floodplain tour of each community, an interactive regional plenary session, and an individual meeting with community representatives to discuss their floodplain management programs. Before the field tour and meetings, OFM staff conducts reviews of digital flood maps to ascertain the presence and location of key flood prone areas in which to conduct assessments of development in flood zones. Also, before the field assessments, OFM staff uploads addresses of properties that are repetitive loss and severe repetitive loss properties, properties that were acquisitions under the Hazard Mitigation Grant Program (HMGP) federal grant program, and properties identified as potentially substantially damaged during recent hurricanes in GIS for reference on tablets used in the field. Once in the community, OFM staff

conducts windshield surveys of these selected areas to assess whether observed development activities appear to be compliant, non-conforming, non-compliant, or mitigated. In addition, communities met together with OFM staff to share concerns, ideas, challenges, and strategies from their perspectives. The individual one-on-one concurrent meetings included detailed discussions on flood histories and characteristics of each community as well as floodplain management activities, observations of development activity, and resolution of compliance issues.

PART 2: Individual One-on-One Community Meeting Report

2. INDIVIDUAL ONE-ON-ONE COMMUNITY MEETING REPORT

Wildwood, City of – Sumter County, NFIP ID 120299

Chief Executive Officer:

Jason McHugh, City Manager, (352) 330-1332, jmchugh@wildwood-fl.gov, 100 North Main Street, Wildwood, FL 34785

2.1 SCORE CAV Concurrent Meeting Participants and Contact Information

Wildwood Community Development Services – 100 North Main Street, Wildwood, FL 34785

Melanie Peavy, Development Services Director, (352) 330-1334, mpeavy@wildwood-fl.gov

Steve Wilcox, Building Official, (352) 689-4400, steven.wilcox@sumtercountyfl.gov

Kathleen Brugnoli, Senior Planner, (352) 689-4400, kathleen.wilcox@sumtercountyfl.gov

Sue Farnsworth, Floodplain Administrator, (352) 689-4400,

susan.farnsworth@sumtercountyfl.gov

FDEM State Floodplain Management Office – 2555 Shumard Oak Blvd, Tallahassee, FL 32399

Michael Burchette, Floodplain Specialist, (850) 815-4520, michael.burchette@em.myflorida.com

Linda Vause, Floodplain Specialist, (850) 815-4542, linda.vause@em.myflorida.com

2.2 Community's Floodplain Management Program Background and Overview

FEMA accepted the City of Wildwood by regular entry into the National Flood Insurance Program (NFIP) on December 26, 1980. Wildwood last had a Community Assistance Visit (CAV) on September 14, 2016, and a Community Assistance Contact (CAC) on November 14, 2017.

Wildwood is an inland community in Sumter County, located in western Florida. The Special Flood Hazard Area (SFHA) consists of Zones Approximate A and AE. As of this report, 185 NFIP flood insurance policies are in force, with a total of three closed paid losses.

2.3 SCORE CAV Findings about the Community

2.3.1 Problems with the Community's Floodplain Management Regulations? None

The community's flood damage prevention ordinance was last amended on February 18, 2020, and is based on the State Model Ordinance, which coordinates with the Florida Building Code (FBC). There are no higher standards other than the mandatory one foot of freeboard required by the FBC. The City is not in the Community Rating System (CRS) Program but is interested in applying upon the closure of this CAV.

The community's flood ordinance designates the Development Services Director as the Floodplain Administrator (FPA). Mrs. Melanie Peavy is the Development Services Director for Wildwood and is the designated FPA; however, she is assisted in her duties by Sue Farnsworth, Sumter County's Planner and Floodplain Administrator, through an interlocal agreement that has been in place since 2015 and specifies administration and enforcement of the local floodplain management program.

2.3.2 Problems with Community's Administration/Enforcement Procedures? None

All permit applications for proposed development within Bushnell's jurisdiction are routed directly to Sumter County. Sumter County's permit technicians conduct the initial flood zone determination when reviewing for compliance with local zoning requirements. If the proposed development is in the Special Flood Hazard Area (SFHA), the permit will become a "building/flood permit." Sumter County requires that Certified Floodplain Managers (CFMs) review flood permits.

Ms. Farnsworth and the County's Building Official review for compliance with the local flood regulations and the flood provisions in the Florida Building Code (FBC), respectively. They are also the two individuals that primarily review Elevation Certificates (ECs) for accuracy and completeness.

During the One-on-One meeting, it was stated that two Elevation Certificates are required throughout the construction process. One is submitted once the lowest floor has been placed prior to vertical construction. The second must be submitted as part of the final inspection prior to issuing a Certificate of Occupancy.

Non-structural development and structures that may be exempt from the FBC are still required to be permitted, whether it is a flood permit or a site development permit, such as in the case of placement of fill.

All sheds are also required to be permitted and are inspected for proper flood openings and anchoring by the Building Inspector.

The County's Code Enforcement is housed in the same building as Sue Farnsworth, Sumter County's Planner, and Floodplain Administrator, facilitating good communication between local entities. The County's code enforcement relies heavily on community support in reporting unpermitted work. It does have a code enforcement officer in place who conducts inspections on a case-by-case basis.

2.3.3 Engineering or Other Problems with FIRMs or FIS? None

The community identified no issues or problems with the Flood Insurance Rate Map (FIRM) or Flood Insurance Study (FIS). The community's effective FIRM date is June 5, 2020.

2.3.4 Problems in the Community's Floodplain Management Program? None

The community does not participate in the Community Rating System (CRS) but is interested in applying upon the closure of this CAV. In the transition of FPAs for the County, the city CRS participation was thought to be in order till the County's CRS cycle this year.

Wildwood staff stated they have not had any issues receiving Repetitive Loss (RL) data from FEMA.

The community participates in the Local Mitigation Strategy (LMS) committee led by the County. The City is currently waiting for an updated list of projects from the stormwater master plan from Public Works to add to its LMS. The City is reminded to contact FDEM with any concerns about the LMS.

2.3.5 Programmatic Issues Identified? None

Neither the OFM nor community staff identified programmatic issues with the National Flood Insurance Program that adversely impacted the community's ability to implement its floodplain management program.

2.3.6 Potential Violations – Community Actions Required: No

No compliance or procedural issues were noted during the field assessment or One-on-One meeting. We appreciate the challenging work of community staff who endeavor to implement a floodplain management program that helps keep the community flood

resilient. For any follow-up questions or future requests for technical assistance, contact Michael Burchette at (850) 815-4520 or Michael.Burchette@em.myflorida.com.

PART 3: STATE COORDINATING OFFICE REGIONAL ENGAGEMENT COMMUNITY ASSISTANCE VISIT (SCORE-CAV) PLENARY

3. SCORE-CAV PRESENTATION AND PLENARY DISCUSSION

3.1 OFM Initiatives and Community Floodplain Management

During the plenary session, OFM staff overviewed key topics and specific community responsibilities for implementing NFIP compliant floodplain management programs. To promote engagement, the OFM deployed polling questions designed to capture audience responses to specialized "polling slides" within each major presentation topic. Attendees were surveyed anonymously through the Webex polling platform. OFM staff discussed the goals and objectives for the SCORE-CAV program, including improved efficiency in the Community Assistance Visit process to increase coordination among the members of the State's floodplain management community.

Further, the Plenary meeting implemented a collegial administrative approach rather than an audit approach. Attendees received a materials packet in which all documents were available for download. The individual evaluation of communities derives from field assessments conducted by the OFM staff and through One-on-One meetings with local floodplain management staff.

Each regional Plenary report is written to reflect the presentation information and group discussion from the relevant Plenary meeting. In addition, individual community evaluations are summarized in Part 2 of this document, therefore providing community-specific reports.

During the overview session, OFM staff discussed State Initiatives, including the following:

- Developing and helping communities adopt the State Model Flood Ordinance Coordinated with the Florida Building Code (FBC).
- Assisting and supporting the Florida Floodplain Managers Association (FFMA), which has evolved significantly over the years as a leader in education, coordination, and communicating the importance of strong floodplain management.
- Followed through on an FFMA Whitepaper with BOAF and FFMA to pursue options to allow public restrooms constructed below the BFE requirements when

engineered to resist flood loads up to and including conditions of the design flood. The effort resulted in a consensus amendment to the International Building Code, effective beginning January 2021, which essentially allows public restrooms to be at or above grade but below BFE requirements as long as they meet the design standards of the IBC. Note: until FEMA develops guidance, public restrooms below BFE are considered non-compliant in V Zones, and in AE Zones unless appropriately dry floodproofed.

- Implementing the [CRS Initiative](#): to help communities join CRS, help prevent communities from retrograding, and help communities advance in CRS ratings;
- Implementing the [CRS-CAV Pilot Program](#) to increase the number of communities in CRS;
- Supporting and helping lead the [Silver Jackets High Water Marks Online App and GIS Map](#), which the FDEM supports on its website; and
- Writing and distributing the comprehensive [Florida Post-Disaster Toolkit for Floodplain Managers](#), [Florida Floodplain Management Quick Guide](#), [Floodplain Management Performance Measures](#), and [Flood Provisions of the Florida Building Code](#). These publications are compiled by the OFM and available in hard copies. Plenary participants were able to download these publications and other additional floodplain management resources from the materials tab during the training session.

During the overview presentation, the OFM advised that 468 communities in Florida participate in the NFIP. The number fluctuates slightly because newly incorporated areas compensate for the occasional community that dissolves and reverts to unincorporated county administration. The State has more than 1.8 million NFIP policies (nearly 36% of the total policies in the Nation), and over the past 40 years, the State has paid in premiums nearly 10 times what Florida has received in claims.

The OFM encourages local staff to review the [Floodplain Management Quick Guide](#), *which has been updated to include information pertaining to the latest Florida Building Code and ASCE-24, including regulatory provisions for Coastal A Zones and the Coastal Construction Control Line*. The OFM also discussed the Floodplain Managers' responsibilities on page 4 of the *Guide* and "Recommended Planning Considerations" on Page 5, which are crucial to floodplain management but are often overlooked in day-to-day floodplain manager's duties and responsibilities.

3.2 Flood Ordinances

OFM staff presented information on its activities over the past eight years to encourage communities to adopt the State Model Flood Ordinance that coordinates with the Florida Building Code. Approximately 26 States have adopted model flood ordinances that incorporate the base codes (International Building Codes) with the NFIP flood building provisions. Florida is the first State whose Model ordinance coordinates with the base codes, which make up the FBC, and is approved by FEMA.

Ordinance adoption statistics as of the date of the report are as follows:

- 98% Adopted or in the process of adopting State Model
- 468 NFIP communities
- 457 have adopted (53 in for a review of updates or post-December 2012 revisions, many of which are addressing the upcoming CRS Class 8 Prerequisite, effective January 1, 2021)
71 under review

The State model should be adopted by the remaining communities to:

- a) Ensure that the ordinance is not duplicative with the State-required building regulations.
- b) Help prevent the local floodplain ordinance from being inconsistent with the FBC now or in the future when the FBC is updated.
- c) Base their local flood ordinances on the FEMA-approved model ordinance that coordinates with the International Building Code; and,
- d) Incorporate clarifying language from FEMA guidance documents that help interpret the NFIP regulations and refer to the FBC, which incorporates design standards contained in the ASCE-24 flood building standards.

3.3 Florida Building Code 6th Edition

OFM staff explained the relationship between the State Model Flood Ordinance, the Florida Building Code, 6th Edition, and the American Society of Civil Engineers (ASCE) 24-14 standards – *Flood Resistant Design and Construction* that govern development in SFHAs. The three documents work together; therefore, all floodplain managers and building officials should have copies to ensure compliance with the NFIP and consistency with the FBC.

The Plenary session addressed the following key points:

- Differentiation between BFE, DFE, and BFE plus freeboard: OFM staff noted that the DFE may be the BFE, or it coincidentally may be the BFE plus freeboard, or, more appropriately as defined in ASCE 24: DFE is the "*Elevation of the design flood, including wave height, relative to the datum specified on the community's flood hazard map.*" Note that the "*design flood*" is also defined as: "*The flood associated with the greater of the following two areas: 1) Area within a floodplain subject to a 1% or greater chance of flooding in any year, or 2) area designated as a flood hazard area on a community's flood hazard map or otherwise legally described.*"

- The FBC includes provisions for dry floodproofing mixed-use development and requiring flood openings on at least two sides of structures and in breakaway walls. In addition, exterior doors must be installed at the top of stairs in enclosures below BFE in Zone V. Where Coastal A Zones are designated, construction must be compliant with Zone V provisions, but stem walls are allowed if their foundations are designed to resist the effects of scouring. Dry floodproofing is allowed in Coastal A Zones if the design accounts for wave loads, erosion, and local scour.
- The OFM discussed the nature of Coastal A Zones as being the area reserved in A Zones where wave heights are expected to be between 3 feet and 1.5 feet, and that will begin to be designated as an area seaward of the Limit of Moderate Wave Action, or LiMWA, on new preliminary maps that are being released starting in late 2019 along the west coast of Florida, south of Tampa Bay and on the east coast south of Brevard County.
- The session also briefly presented a summary of the Coastal Construction Control Line (CCCL) requirements and the effort by DEM and DEP through FBC updates to reduce inconsistencies between the CCCL requirements and the NFIP. The DEP no longer regulates building construction seaward of the CCCL since its regulations transferred to Chapter 31, Section 3109, Special Construction, FBC. However, DEP still regulates the environmental impacts of construction seaward of the CCCL through its CCCL permitting program.

3.4 Mapping

OFM staff discussed various references and map information helpful to assist home buyers, insurance agents, and contractors in their respective needs, for flood elevation determinations beyond FIRMs, and for regulating development. Key sources of information on the FEMA Map Service Center (MSC), whose data include online FIRMs and Flood Insurance Studies (FIS), effective and historical flood zone information, and Letters of Map Changes. The MSC is also the location where property owners may submit requests for letters that confirm if properties are "Out as Shown," among other data.

OFM staff discussed the Risk MAP process and the kinds of regulatory and non-regulatory information available with the Risk MAP products. The OFM emphasized the importance of actively engaging in the Risk MAP process, particularly during Discovery, Risk Assessment, Resilience meetings, and issuance of Preliminary FIRMs. Participation in this process is essential as the FIRMs evolve from being FEMA preliminary maps to Community-adopted maps. Communities should carefully review new maps to identify potential errors. If communities discover errors, they are encouraged to provide valid scientific or technical data to appeal for map corrections before FEMA approves maps.

Following the appeal period, and after FEMA makes any corrections which may take a few months to a few years, communities must adopt the maps as their official flood maps.

Communities are strongly encouraged to notify property owners identified on the Summary of Map Actions (SOMA) transmitted by FEMA in letters to community chief executive officers and floodplain administrators. In addition, communities should conduct map outreach meetings to engage the public in becoming more aware of flood risks and the need to purchase flood insurance before maps become effective. This will also alert property owners who may be planning new business or residential property construction to ensure that designs and budgets are available to meet flood building provisions that may be in effect when applying for permits. Property owners who purchase NFIP flood insurance before a map change that places their property in a flood zone will receive a short-term discount on premiums.

The OFM staff discussed specific circumstances when community staff might implement preliminary flood maps for regulatory purposes. FEMA encourages communities to reasonably utilize preliminary information when BFEs increase and floodways are revised to ensure that their citizens' health, safety, and property are protected. When BFEs decrease, communities should not use this data on preliminary flood maps because the data could change, or properties may be subject to a much higher insurance premium if the property should end up being below BFE when the final maps are issued. *Floodplain Management Bulletin 1-98* is a helpful guide when communities can and should employ maps before their effective date for both conditions where BFEs are increased and decreased.

Another excellent source of information for determining appropriate elevations for constructing the lowest floor in unnumbered Zone A is the FEMA publication "*Managing Floodplain Development in Approximate Zone A Areas*," produced in April 1995. For properties mapped out of flood zones, FEMA's "Out as Shown" document provides directions on how to submit an MT-EZ Form to obtain a FEMA verification that structures outside of a flood zone that otherwise requires the purchase of flood insurance.

For further information about determining BFEs using FIRMs and FIS, the Florida Floodplain Managers Association offers an informative course called "Determining the Base Flood Elevation" that covers coastal transects and tables cross-sections and profiles, floodway data tables, and stillwater elevation tables. The course offerings are accessible on FFMA's website under the "Calendar of Events."

3.5 Permitting

OFM staff presented information concerning key matters for regulating development, permitting and compliance review observed during Community Assistance Visits over the past 3-5 years. Issues discussed included the following topics:

- The Importance of Permit Application Forms (See OFM's *Floodplain Management Performance Measures* templates for samples and checklists).
- Processing, tracking, reviewing permit applications, and verifying that final work is inspected and compliant with regulations.
- Approving variances from flood ordinances based on 44 CFR 60.5 criteria.
- Causes and types of change orders may trigger a **substantial improvement determination** and requirement for structures to comply with base flood elevation requirements and adopted freeboard.
- Consideration of Endangered Species and Historic Structures when permitting.
- *Substantial Improvement/Substantial Damage Desk Reference* (FEMA P-758).
- Permitting for Manufactured Homes: Manufacturer's Instructions, DHSMV Rules, Building Officials' Roles in permitting and inspecting MFH.

3.6 Virtual Tour of Floodplain Development

At the closing of the AM session and at the beginning of the PM session, the OFM presented fourteen (14) photos depicting representative potential floodplain violations and examples of compliant structures for participants' assessment and to pose hypothetical follow-up actions if necessary. Each photo is tailored to represent topics discussed in the morning or covered in the afternoon. In addition, participants were invited to answer verbally, indicate the number of potential violations shown (if any), and give a brief explanation. The exercise focuses participants' attention on existing conditions that may or may not be violations but are worthy of additional investigation by Code Enforcement Officials to ensure compliance with the NFIP.

Group Discussion

These interlude sessions engage participants to discuss why structures are compliant or non-compliant and set the stage, or emphasize the importance, for the following session on "Violations and Enforcement." According to participants, the discussion of photos for compliance purposes continues to be a popular and meaningful part of the day-long Plenary program.

3.7 Violations & Enforcement

OFM staff presented a pie chart showing the most common compliance issues observed over the past five years. By order of most common to least common, the table shows the following areas of most frequent violations:

- Violations of local flood ordinances or failure to adopt State Model Flood Ordinances
- Incomplete or incorrect Elevation Certificates
- Insufficient Substantial Improvement/Substantial Damage determinations processes
- Administrative procedures that are insufficient, lacking, or not documented in records
- Inadequate regulation of Accessory Structures
- Recreational vehicles exceeding the limited time allowed on property, or with outdated tags or not road-ready when not elevated
- Insufficient required certifications
- Inadequate inter-local agreements between local governing bodies
- Tanks not elevated or anchored

The OFM encourages community staff to request "General Technical Assistance" (GTAs) by email or telephone to clarify regulatory or programmatic floodplain management challenges. In recent years, the most frequent requests concern the following in order of the number of requests: floodplain permitting, floodplain coordination, follow-ups from CAVs, general NFIP information, floodplain management post-disaster response activities, SI/SD, CRS, floodplain management ordinance questions, Elevation Certificates, and potential violations.

The OFM receives over 500 GTAs each year from local government staff and citizens, out-of-state property buyers, and through referrals from FEMA. As required by FEMA, States must record GTAs to demonstrate coordination activities and technical assistance to NFIP-participating local governments and flood insurance policyholders.

OFM staff presented examples of the most common recurring reasons for violations that require some degree of enforcement by local governments, and these include:

- **Property owner** "does not know about" regulations, the activity was not known to be a violation, or property owner/contractor purposefully meant to avert the NFIP regulations,
- **Floodplain Managers** fail to conduct floodplain inspections and overlook violations which suggest that non-compliant activities are acceptable,
- **Code Enforcement Officers** are unaware of NFIP regulations, community flood ordinances, and therefore violations are considered acceptable and become more commonplace,
- **Judge or Magistrate** thinks NFIP regulation are superfluous, and rules in favor of property owner or sets penalties too low to induce compliance or to discourage future violations,

- **Unresolved compliance issues** may impact continued eligibility to participate in the NFIP (probation or suspension) or ineligibility for communities to participate in CRS, and,
- **Often, citizens report violations** to the local government or OFM, and if communities fail to implement enforcement actions, violations may become more frequent.

The OFM developed the [Floodplain Management Performance Measures](#) package provided to each community participating in the SCORE CAV meeting as an essential tool to help communities address the most common compliance issues. The *Performance Measures* include preferred procedures for implementing the NFIP at the local level. In addition, the package consists of templates and checklists for non-structural and structural permit application forms, substantial improvements, and historic structure improvements.

OFM staff emphasized that an excellent way to gain elected officials' knowledge and support for local staff floodplain management responsibilities is to adopt by resolution the [Floodplain Management Performance Measures](#). Ensuring that staff has an excellent working knowledge of these documents is paramount to a successful program. In addition, consistency in enforcing regulations and diligently verifying that Elevation Certificates are complete and accurate are critical elements to ensure that communities are as flood resilient as possible. Together, these activities create the best opportunity for communities to become flood resistant to major storm events like the State has experienced over the past several years.

3.8 Post Disaster Roles and Responsibilities

OFM staff referred to the [Florida Post-Disaster Toolkit for Floodplain Administrators](#), providing it to communities attending the Plenary. Because of Hurricanes Hermine, Matthew, and Irma that struck Florida during recent years, the State developed the *Toolkit* because there was no FEMA-produced compilation of important guidance to direct Floodplain Administrators in their roles and responsibilities following major storm events. The OFM staff discussed the format and organization of the *Toolkit*, explaining the significance and importance of each of the six "action items" covered in the booklet. Importantly, the *Toolkit* contains links to additional information. A summary of each section follows:

Action 1 Plan ahead to communicate to elected officials and managers the role and functions of floodplain administrators following flood disasters. This is critical because managers need to know or be reminded that the community will need concerted work to meet its NFIP requirements, informational needs, and compliance responsibilities for property owners whose properties may be impacted by wind and water.

Action 2 Assess post-disaster needs and request assistance. Among the duties that Floodplain Administrators, Building Officials, and Emergency Managers must perform are obtaining documentation of High-Water Marks and conducting Substantial Damage Determinations (in addition to, and not be confused with, conducting Preliminary Damage Assessments) that will set the stage for property owners' responsibilities in repairing their structures. This work can be challenging but must be conducted before losing High-Water Marks and before property owners begin repairing their structures. The OFM and FEMA envision communities requesting assistance from the State, FEMA, and other support organizations like the Building Officials Association of Florida and the Florida Floodplain Managers Association through the Statewide Mutual Aid Agreement.

Action 3 Document "High-Water Marks" to record the depth and extent of area flooding. This is essential work for assessing risk for future flood events. Documenting the depth of floodwaters in structures may support a finding of substantial damage, and the data may inform future flood map updates.

Action 4 Making substantial damage determinations is arguably the most crucial task that Floodplain Managers perform to break the cycle of repeated flood damage and ensure future flood resilience. By proactively conducting substantial damage determinations, Floodplain Administrators will be able to advise property owners if their structures will need to be made compliant by meeting elevation requirements, thereby mitigating future flood losses before design and repair work is contracted. In addition, thorough observations and documentation of damages are essential to convince property owners that they must comply with NFIP, local flood ordinances, and the Florida Building Code to ensure safe and resilient construction.

Action 5 Understand the NFIP claims process and Cost of Compliance. Following disasters, Floodplain Administrators need to survey their community for damages, make Substantial Damage Determinations if required, and ensure that home and business owners are applying for permits before beginning repair work. NFIP flood insurance policies include Increased Cost of Compliance (ICC) coverage for buildings in Special Flood Hazard Areas. A Substantial Damage Determination mandates the repairs to bring a building into compliance with current codes, which may include elevating to the current DFE. ICC claims can help pay for relocating, elevating, demolishing buildings, and dry floodproofing nonresidential buildings. In addition, ICC claims may serve as a match for FEMA mitigation grants available through FDEM.

Action 6 Identify post-disaster and mitigation funding assistance. Property owners face significant costs when repairing their homes in compliance with effective codes. There is an array of Federal, State, and private-sector funding sources that can be used to repair homes and businesses affected by a flood. The

Toolkit includes short descriptions of these funding sources, notably Appendix C, which lists website URLs for post-disaster funding support and information that may aid the repair or mitigation of properties.

OFM staff presented information significant to floodplain administrators on the Disaster Recovery and Reform Act (DRRA 2018) that, among many other provisions, provides a reimbursement mechanism to support the most time-consuming and challenging role facing Floodplain Administrators -- the conducting of substantial damage assessments.

The DRRA authorizes reimbursement from FEMA's Public Assistance (PA) program to "provide assistance to State and local governments for building code and floodplain management ordinance administration and enforcement, including inspections for substantial damage compliance...." FEMA has advised the Florida Floodplain Managers Association (FFMA) and the Building Officials Association of Florida (BOAF) that if communities deploy staff to assist other communities in conducting substantial damage assessments, since it has yet to produce specific guidance on many post-disaster procedures, FEMA is not able to guarantee the reimbursements for PA.

On January 21, 2020, FEMA distributed its Draft "**Recovery Policy on Building Code Floodplain Management Administration and Enforcement**" for public comment. OFM staff reiterated that if communities follow the established procedures used for other allowable post-disaster reimbursements under the Public Assistance program, including allowable expenses and documentation of receipts, the OFM is confident after speaking with State PA staff that it will approve requests for reimbursement for proactive substantial damage determinations.

3.9 Mitigation Strategies

OFM staff reviewed mitigation strategies well known by Floodplain Administrators as "FRED," which is an acronym for "Floodproof," "Relocate," "Elevate," and "Demolish" (and acquire properties). OFM staff presented the top five hazard mitigation project types that FEMA funded in 2020: food control, acquisitions, utility and infrastructure protection, generators, and saferooms. The National Institute of Building Sciences 2018 summary report shows that Federal Mitigation Grants have a 6 to 1 benefit-cost ratio, saving \$6 in recovery costs for every \$1 spent on mitigation.

Next, the group discussed the difference between available grant funding and applicable loans, both funding options described in the *Toolkit*. FEMA organizes mitigation funding administered by the State into "non-disaster" mitigation funding and "disaster" mitigation funding. FEMA non-disaster grants administered by DEM include the Flood Mitigation Assistance and [Pre-Disaster Mitigation](#) (PDM) grants to support ongoing natural hazard mitigation projects, including planning and project grants, and raising public awareness about reducing future losses before disasters strike. In 2020, the

Building Resilient Infrastructure and Communities (BRIC) grant program replaced PDM. Eligible mitigation activities are expanded under BRIC.

Disaster funding is available for Presidentially-declared disasters under the [Hazard Mitigation Grant Program \(HMGP\)](#) for infrastructure repair projects, large community projects, and projects that resolve damage risk factors in neighborhoods or stormwater management projects. Notice of funding opportunity and the eligibility deadline is no later than 120-days following landfall of the storm event, and projects must be complete within 3-1/2 years unless DEM and FEMA approve extensions.

Communities that wish to become sub-grantees under State grants from FEMA must have an adopted [Local Mitigation Strategy \(LMS\)](#) plan, and projects must be in the plan to receive funding. The State has the authority to implement a Legislatively-funded grant program not required to be in the LMS plans for mitigation projects. This program is the [Hurricane Loss Mitigation Program](#). Limited funding is available for retrofitting existing facilities used for hurricane shelters (\$3 million), inspection and tie-downs for manufactured homes (\$2.8 million) administered by Tallahassee Community College, and funding for residential structures to mitigate against wind and flood damage (\$3.5 million).

Mitigation loan programs briefly mentioned during the session, and that are included in the [Florida Post-Disaster Toolkit for Floodplain Administrators](#) for more information are:

- Title 1 Property Improvement Loan for Manufactured Homes (HUD)
- FHA 203K Construction/Rehabilitation Loan (HUD)
- HOME Investment Partnerships Program (Federal Block Grant) (HUD)

The *Toolkit* includes funding assistance or loans to help recover from disasters in twenty different federal, state, and private-sector grants or loan programs. More importantly, OFM staff emphasized that the best and quickest available money for a home or business repair following a disaster is through an NFIP insurance policy. FEMA pays claims much faster and before grant awards and are not subject to interest rates and paybacks like loans. The OFM strongly suggests that local officials encourage residents, even those outside of SFHAs, to purchase a flood insurance policy, reiterating that 25% of flood claims occur in X Zones, where there is no mandatory purchase for federally backed loans. Finally, the OFM discussed the FEMA AW-501 form as a tool to remove mitigated, repetitive loss properties from repetitive loss lists, and communities that participate in CRS must complete this form for mitigated properties.

3.10 Flood Insurance

OFM staff presented information on the following topics:

- New Flood Insurance Manual has undergone significant revisions and is much easier to read and find answers to NFIP insurance questions.
- Key disconnects between Insurance policy coverage and NFIP regulations.

- Repetitive Loss properties and the need to complete FEMA AW-501 Forms when communities are aware of mitigated properties.
- Use and limitations of ***Increased Cost of Compliance*** claims for use in the match for mitigation grants.
- Non-compliant, non-conforming, and "submit for rate" premiums.
- FIMA's new, not yet released "Risk Rating and Policy Forms Redesign."

The Flood Insurance Manual includes information that Floodplain Administrators may find helpful information on the community CRS status that FEMA updates twice per year. In addition, the user-friendly manual consists of an updated "Verification of Flood Zone Determination Letter" to document the effective flood zone and elevation for property owners that may help work with mortgage companies and insurance agents.

Florida Legislature continues to pass bills that provide support for the private flood insurance market. The legislation ensures minimum equivalency with the NFIP and allows the private market to offer additional lines and excess coverage not offered by the NFIP. Pertinent legislation is available in Section 627.715, Florida Statutes.

DEM has hired a staff member to research and develop data for Florida's emerging private residential flood insurance market and its potential impacts on the NFIP policies. Staff will compare requirements for flood insurance coverage for high-risk properties with federally backed mortgages to those with privately mortgaged properties. Staff will also research the regulatory authorities for adjusting claims and compare NFIP policy provisions with Florida statutory requirements.

The Federal Insurance Management Agency (FIMA) is pursuing revisions to rating properties for flood risk. The innovative approach is "Risk Rating 2.0" to restructure the NFIP to make it more equitable among the insured, user-friendly, and marketable. FIMA is working to make higher risk properties pay more in premiums than lower risk properties to make the cost of flood insurance fairer for the insured. FIMA proposes a more accurate risk analysis on individual structures based on proximity to the source of flooding. The newly structured flood insurance program will also consider the size of structures relative to premium costs to ensure equitable rates.

FIMA has begun to roll out the first phases of Risk Rating 2.0 beginning October 1, 2021. FIMA will reformat the new NFIP policy forms to make them easier for agents to sell. Policies will be more understandable to policyholders, agents, and adjusters. FIMA will test the new forms against the rating plan to determine if pricing is reasonable.

3.11 Community Rating System

OFM staff presented an overview of the State's activities to promote communities' participation in the CRS program and enhance flood resiliency, support mitigation, and reduce the cost of flood insurance for property owners. The State has experimented with several activities to stimulate participation and advancement in CRS, including the

[CRS Initiative](#), the [CRS-CAV Pilot Program](#), and is interested today in learning from communities how the State can best support those that participate in CRS.

The State is working with FIMA and ISO to confirm that several higher standards, such as more stringent regulations in the State Model Flood Ordinance, may automatically earn points for communities. In addition, the State is working to develop a program to support the development of stormwater master plans that will help enable as many as 35 communities to meet requirements for advancing from CRS Class 5 to Class 4. Conservatively, if all communities advanced from a Class 5 to Class 4, the calculated result in savings for these communities is upwards of \$190 million in NFIP reduced flood insurance premiums.

The State continues to support FFMA in scheduling the L-278 CRS course each year to provide program training using the CRS manual. The OFM also provides floodplain map information through DEM's GIS office when requested by communities. The OFM is looking for additional ideas on how the limited State staff can best support community CRS programs despite not being able to provide supplement staff support at the local level.

3.12 Meeting Wrap-Up

OFM staff reviewed the five steps involved in conducting the SCORE CAV process. **First**, the process begins with the OFM conducting floodplain assessments a few weeks before the plenary meeting. **Second**, the interactive regional plenary meeting shares and discusses common floodplain management issues and strategies. This may encourage the formation of regional floodplain management coordination groups like CRS User Groups. **Third**, the one-on-one meetings later in the week with community staff go over issues specific to the community and resolve any compliance matters observed during floodplain assessments. **Fourth**, communities work individually with the OFM to resolve any procedural or compliance issues and are encouraged to adopt, by resolution, the packet of [Floodplain Management Performance Measures](#) to ensure procedures are compliant with the minimum NFIP requirements. And **fifth**, closure of the CAV report with written notification sent to the local government and FEMA that the OFM closed the community's CAV report, and it is eligible to continue participation in the NFIP and for those that participate in CRS, continue to receive premium discounts on NFIP flood insurance policies.



STATE OF FLORIDA

DIVISION OF EMERGENCY MANAGEMENT

Ron DeSantis
Governor

Kevin Guthrie
Director

June 16, 2023

Jason McHugh, City Manager
City of Wildwood
100 North Main Street
Wildwood, FL 34785

RE: Transmittal and Closure of NFIP Community Assistance Visit (CAV) Report

Dear Mr. McHugh,

Thank you for the City's participation in the NFIP State Coordinating Office Regional Engagement (SCORE) CAV meeting, held April 25, 2023, to discuss floodplain management practices, issues, and solutions. Using a three-tiered approach, the Florida Division of Emergency Management's Office of Floodplain Management (OFM) conducted floodplain tours of each community, hosted a six-hour plenary session, and met one-on-one with staff from each community to discuss the communities' floodplain management programs and compliance matters.

The City has addressed or resolved any matters of concern identified by the OFM during the CAV process, and the OFM's evaluation of the City's Floodplain Management Program confirms that the City effectively implements its floodplain management program. The State is pleased to close the CAV report. By copy of this letter, the OFM advises FEMA that the City has a compliant floodplain management program and is deemed eligible to continue participating in the National Flood Insurance Program.

Should you have any questions regarding the Community Assistance Visit or report, please contact me or Michael Burchette at (850) 815-4520 or by email at Michael.Burchette@em.myflorida.com.

Sincerely,

Conn H. Cole, MBA/PA, CFM
Florida NFIP State Coordinator
Office of Floodplain Management

CC/km

Attachment

cc w/attach:

Melanie Peavy, Development Services Director, City of Wildwood
Sue Farnsworth, Floodplain Administrator, Sumter County
Kristabel Moore, Deputy State Floodplain Manager, FDEM OFM
James Mascellino, Floodplain Management Specialist, FEMA Region IV
Tammy Hansen, Floodplain Management Specialist, FEMA Region IV