



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

August 25, 2025 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. 103, forty-eight (48) hours in advance of the meeting.

F.S.S. 286.0105 - 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. *MINUTES FOR APPROVAL: AUGUST 11, 2025 REGULAR MEETING*

C. *A25-0583 UF HEALTH OXFORD FREESTANDING EMERGENCY DEPARTMENT*

3. Presentations and/or Proclamations

4. Public Hearings - Timed - Legislative

- A. *SWEAR IN CITY STAFF AND PUBLIC SPEAKERS*
- B. ***RESOLUTION NO. R2025-26 - A RESOLUTION OF THE CITY OF WILDWOOD, SUMTER COUNTY, FLORIDA, AMENDING THE FISCAL YEAR 2024-2025 BUDGET; AUTHORIZING THE CITY MANAGER OR HIS DESIGNEE TO TAKE ALL ACTIONS NECESSARY TO IMPLEMENT THE TERMS AND CONDITIONS OF THIS RESOLUTION; PROVIDING FOR AN EFFECTIVE DATE.***

FY25 Third Budget Amendment

Staff recommends approval.

- C. ***ORDINANCE NO. O2025-36 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROVIDING FOR THE VOLUNTARY ANNEXATION OF CERTAIN REAL PROPERTY CONSISTING OF APPROXIMATELY 27.14 ACRES LOCATED NORTH OF CR 519A, APPROXIMATELY 0.5 MILES WEST OF N US 301, IN SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST; WHICH IS CONTIGUOUS TO THE CITY LIMITS OF THE CITY OF WILDWOOD AND LOCATED IN THE CITY'S JOINT PLANNING AREA; PROVIDING THAT SECTION 1-14 OF THE CITY OF WILDWOOD CODE OF ORDINANCES IS AMENDED TO INCLUDE THE ANNEXED PROPERTY; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

A25-2689 (AN) South Wildwood Industrial Park West

The applicant and owner, Harry Harmer, has submitted a voluntary annexation application for parcel F25-261. The property to be annexed totals 27.58 acres MOL and is located north of CR 519A, approximately 0.5 miles east of N US 301.

Staff recommends approval.

- D. ***ORDINANCE NO. O2025-37 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROVIDING FOR THE VOLUNTARY ANNEXATION OF CERTAIN REAL PROPERTY CONSISTING OF APPROXIMATELY 0.115 ACRES LOCATED AT 5341 LEXINGTON CIR, WILDWOOD, FL 34785, APPROXIMATELY 150 FEET EAST OF THE INTERSECTION OF HERITAGE BLVD. AND LEXINGTON CIRCLE, IN SECTION 16, TOWNSHIP 19 SOUTH, RANGE 23 EAST; WHICH IS LOCATED IN THE CITY'S JOINT PLANNING AREA; PROVIDING THAT SECTION 1-14 OF THE CITY OF WILDWOOD CODE OF ORDINANCES IS AMENDED TO INCLUDE THE ANNEXED PROPERTY; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.***

A25-2723 (AN) 5341 Lexington Cir Annexation

Parcel G16ED003

The applicant/owner, Glen R. Tryan and Donna J. Tryan, has submitted a voluntary annexation for parcel G16ED003.

Staff recommends approval.

- E. ***ORDINANCE NO. O2025-38 - AN ORDINANCE OF THE CITY COMMISSION OF THE CITY OF WILDWOOD, FLORIDA, TO EXECUTE THE RENAMING OF CLAY DRAIN ROAD / CR 156 TO MIKE JACOBS SR ROAD; REQUESTING THE SUMTER COUNTY 911 COORDINATOR ISSUE ADDRESSES PURSUANT TO THIS ORDINANCE; AUTHORIZING THE CITY MANAGER OR DESIGNEE TO EXECUTE ANY NECESSARY DOCUMENTATION; PROVIDING FOR AN EFFECTIVE DATE.***

Clay Drain Road Name Change Ordinance

Staff recommends approval.

5. **Public Hearings - Timed - Quasi-Judicial**
6. **Public Forum - 4 minute time limit**
7. **Ordinances First Reading Only (No Vote)**

- A. ***ORDINANCE NO. O2025-33 - 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.***

A25-1910 - SSCPA - SunKool Office

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 Industrial (Sumter County) to Commercial (City) for the parcels listed above on 5.60 acres MOL.

The Planning and Zoning Board/Special Magistrate recommends approval of Ordinance O2025-33.

- B. ***ORDINANCE NO. O2025-34 - 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.***

A25-1909 - Rezoning - SunKool Office

The applicant is seeking approval from the City Commission for a Zoning Map Amendment to change the zoning district from CL and RR1C (County) to C-3 (City) for the parcel listed above on 5.60 acres MOL.

The Planning and Zoning Board/Special Magistrate recommends approval of Ordinance O2025-34.

- C. ***ORDINANCE NO. O2025-41 - AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA; ADOPTING AND APPROVING THE FIFTH AMENDMENT TO CONTRACT FOR SOLID WASTE AND RECYCLING SERVICES; AMENDING SECTION 4.D. EXCLUSIVE RIGHTS; AMENDING EXHIBIT "A" (CITY OF WILDWOOD RATES EFFECTIVE 10/01/25 THROUGH 09/30/26); PROVIDING FINDINGS AND INTENT; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE.***

Approval of Fifth Amendment to City of Wildwood - Waste Management Contract

Staff recommends approval.

8. Resolutions for Approval

- A. ***RESOLUTION NO. R2025-29 - A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF WILDWOOD, FLORIDA; ADOPTING THE LAW ENFORCEMENT, PARKS AND RECREATION, AND WATER AND SEWER IMPACT FEE STUDY COMPLETED BY STANTEC; PROVIDING FOR AN EFFECTIVE DATE.***

Resolution to Adopt the Stantec Impact Fee Study

Staff recommends approval.

9. Financial & Contracts & Agreements

- A. ***MILLENNIUM PARK PROJECT CHANGE ORDER NO. 2 IN THE AMOUNT OF \$127,000***
- B. ***MILLENNIUM PARK PHASE 1 & 2 PROJECT PAYMENT APPLICATION 6 IN THE AMOUNT OF \$249,068.81***
- C. ***APPROVAL OF AWARD TO KINGDOM CONSTRUCTION FOR DOWNTOWN TRASH COMPACTOR ENCLOSURE IN THE AMOUNT OF \$55,278***
- D. ***CR 501 WTP IRON FILTER PROJECT PAY APPLICATION NO. 6 TO SGS CONTRACTING SERVICES, INC FOR THE AMOUNT OF \$314,890.80***

E. *EASEMENT AGREEMENT WITH LOT 2 TURKEY RUN*

F. *APPROVAL TO AWARD RFP #2025-07 BENEFITS CONSULTING & BROKER SERVICES*

10. General Items for Consideration/Discussion and Other Business

11. Appointments

12. City Manager Reports

A. *LOCAL CONSTRUCTION PROJECTS UPDATE*

13. Other Department Reports

14. Commission Members Reports

15. City Attorney Reports

16. Adjournment

Upcoming Events

September 1, 2025 - Labor Day - City Hall Closed

September 6, 2025 - Wildwood Comedy Night at the Warfield Auditorium at 6:30pm

September 8, 2025 - City Commission Meeting at City Hall at 7pm (Budget Hearing)

August 25, 2025 7:00 PM

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING AUGUST 25 2025

08/20/2025
03:52 PM

Revenue Account Range: First to zzz-zzz-zzzz

Include Non-Anticipated: No

Year To Date As Of: 08/31/25

Expend Account Range: First to zzz-zzz-zz-zzzz

Include Non-Budget: No

Print Zero YTD Activity: No

Prior Year: Thru 09/30/24

Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
001-311-1000	AD VALOREM TAXES	16,494,816.18	18,515,900.00	18,645,499.28	129,599.28	101
001-312-4100	LOCAL OPTION GAS TAX	1,146,258.46	1,237,500.00	1,042,523.88	194,976.12-	84
001-312-6000	DISCRETIONARY/LOCAL GOVT. INFRA	4,393,938.14	4,870,300.00	4,317,662.66	552,637.34-	89
001-313-1000	FRANCHISE TAX-/PROGRESS ENERGY SVCS	1,033,765.38	1,155,000.00	591,779.15	563,220.85-	51
001-313-1010	FRANCHISE TAX- SECO	1,569,065.65	1,760,000.00	1,631,177.20	128,822.80-	93
001-313-4080	LEESBURG ELECTRIC FRANCHISE FEE	64,086.61	99,000.00	46,644.66	52,355.34-	47
001-313-4160	FRANCHISE TAX- TECO/PEOPLES GAS	316,154.54	396,000.00	228,269.32	167,730.68-	58
001-313-4175	GIBSON PLACE WATER CONSERV AUTH FRA	36,243.88	66,000.00	89,136.28	23,136.28	135
001-313-4180	LEESBURG GAS FRANCHISE FEE	82,407.67	82,500.00	114,917.29	32,417.29	139
001-313-4185	MIDDLETON WATER CONSERV AUTH FRAN F	26,015.18	15,000.00	30,715.02	15,715.02	205
001-313-4190	SOUTH SUMTER UTILITY COMPANY FRANCH	618,297.40	965,000.00	971,490.44	6,490.44	101
001-313-4195	MIDDLETON UTILITY CO FRANCHISE FEES	25,697.66	30,700.00	35,187.38	4,487.38	115
001-313-4196	GIBSON PLACE UTILITY CO FRAN FEES	11,311.94	58,600.00	81,977.94	23,377.94	140
001-313-5000	FRANCHISE TAX- WASTE MGMNT-REFUSE S\	240,819.28	242,000.00	238,508.57	3,491.43-	99
001-313-5001	TRI-COUNTY SANITATION FRANCHISE FEE	242,815.30	385,000.00	375,101.40	9,898.60-	97
001-314-1000	UTILITY TAX-PROGRESS ENERGY SVCS.	877,029.52	896,500.00	540,712.72	355,787.28-	60
001-314-1010	UTILITY TAX-SUMTER ELECTRIC	1,448,274.04	1,265,000.00	1,515,583.95	250,583.95	120
001-314-3000	UTILITY TAX-WATER SALES	146,548.06	126,500.00	144,356.77	17,856.77	114
001-314-3002	THE VILLAGES-5% WATER UTILITY TAX	229,890.68	275,000.00	163,542.38	111,457.62-	59
001-314-3003	CENTRAL SUMTER UTILITY CO. LLC	144,850.29	220,000.00	115,775.77	104,224.23-	53
001-314-4000	UTILITY TAX-SUBURBAN PROPANE	15,321.81	18,700.00	11,893.38	6,806.62-	64
001-314-4030	FERRELLGAS LP	1,770.05	1,500.00	3,576.10	2,076.10	238
001-314-4040	CIRCLE K STORES	335.99	200.00	202.63	2.63	101
001-314-4080	LEESBURG ELECTRIC UTILITY TAX	56,228.53	60,500.00	37,887.93	22,612.07-	63

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING AUGUST 25 2025

08/20/2025
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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
001-314-4081	LEESBURG GAS UTILITY TAX	132,922.08	99,000.00	181,391.84	82,391.84	183
001-314-4090	THERMOTANE PROPOANE UTILITY TAX	47.29	0.00	0.00	0.00	0
001-314-4100	INTERCONN RESOURCES LLC	11,936.00	15,000.00	12,294.54	2,705.46-	82
001-314-4110	THOMPSON GAS SOUTHEAST	0.00	0.00	66.22	66.22	0
001-314-4140	PAR GAS	0.00	0.00	43.77	43.77	0
001-314-4150	CVS	398.98	300.00	240.09	59.91-	80
001-314-4151	AMERIGAS PROPANE	4,408.93	8,000.00	5,326.01	2,673.99-	67
001-314-4152	LOWE'S PROPANE TAX	1,789.94	2,500.00	1,307.81	1,192.19-	52
001-314-4153	BLOSSMAN COMPANIES PROPANE TAX	343.84	300.00	263.82	36.18-	88
001-314-4160	TECO-PEOPLES GAS UTILITY TAX	406,313.53	396,000.00	350,555.64	45,444.36-	89
001-314-4162	GAS SOUTH UTILITY TAX	778.50	440.00	640.47	200.47	146
001-314-4190	SOUTH SUMTER UTILITY CO UTILITY TAX	180,650.74	187,000.00	293,448.94	106,448.94	157
001-314-4191	PUBLIX UTILITY TAX	875.89	1,000.00	672.52	327.48-	67
001-314-4195	MIDDLETON UTILITY CO UTILITY TAX	9,051.20	5,000.00	11,830.06	6,830.06	237
001-314-4196	GIBSON PLACE UTILITY CO UTIL TAX	3,640.08	20,000.00	26,158.69	6,158.69	131
001-314-9010	STATE COMMUNICATIONS TAX	836,621.32	908,000.00	803,112.97	104,887.03-	88
001-331-5000	FEMA GRANT	33,192.46	0.00	1,163.95	1,163.95	0
001-335-1200	STATE REVENUE SHARING	952,865.15	1,080,800.00	928,111.89	152,688.11-	86
001-335-1400	MOBILE HOME LICENSES	15,925.56	16,500.00	14,875.61	1,624.39-	90
001-335-1600	STATE BEVERAGE LICENSES	9,661.20	7,500.00	8,996.95	1,496.95	120
001-335-1800	1/2 CENT SALES TAX	2,198,674.74	2,255,570.00	1,890,341.72	365,228.28-	84
001-339-1010	MIDDLETON UTILITY CO PILOT FEES	3,622.04	3,000.00	5,010.40	2,010.40	167
001-341-2006	COMMUNITY DEVELOPMENT SERVICES	687,911.59	759,000.00	662,598.77	96,401.23-	87
001-341-2010	TREE MITIGATION PERMITS	76,470.00	500.00	505.56	5.56	101
001-342-9000	VCS CROSSING GUARD PROGRAM	0.00	0.00	43,147.66	43,147.66	0
001-347-4000	SPECIAL EVENT PERMIT FEE	0.00	0.00	850.00	850.00	0
001-347-5300	BUILDING RENTAL-WILDWOOD COMMUNITY	143,962.95	70,000.00	75,396.71	5,396.71	108

CITY OF WILDWOOD
YEAR TO DATE REVENUE-EXPENDITURE REPORT
COMMISSION MEETING AUGUST 25 2025

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
001-347-5302	COMMUNITY CENTER-RESERVATION FEES	2,458.90	0.00	15,546.14	15,546.14	0
001-347-5304	COMMUNITY CENTER STAFF FEES	0.00	0.00	1,865.07	1,865.07	0
001-347-5305	BUILDING RENTAL-OXFORD COMMUNITY CEI	12,251.24	10,000.00	15,279.29	5,279.29	153
001-347-5306	BUILDING RENTAL-MLK JR COMMUNITY CEN	2,421.43	1,500.00	873.59	626.41-	58
001-347-5307	OUTDOOR BUILDING RENTALS	280.31	100.00	965.59	865.59	966
001-347-5308	OPEN SPACE RENTALS	1,005.14	800.00	9,427.19	8,627.19	***
001-350-1000	FINES	85,329.42	30,000.00	62,101.21	32,101.21	207
001-351-1002	CODE ENFORCEMENT	33,515.90	1,500.00	4,118.35	2,618.35	275
001-351-3000	POLICE-2ND DOLLAR FUND	7,947.28	2,500.00	5,153.50	2,653.50	206
001-361-0000	INTEREST EARNINGS	222,934.18	100,000.00	174,758.60	74,758.60	175
001-369-0000	OTHER MISCELLANEOUS REVENUE	4,030.71	5,000.00	18,956.35	13,956.35	379
001-369-0010	STATE HIGHWAY LIGHTING AGREEMENT	18,297.94	18,850.00	18,847.01	2.99-	100
001-369-0012	FDOT HIGHWAY MAINTENANCE AGREEMENT	19,032.94	18,900.00	14,242.00	4,658.00-	75
001-369-0050	AUCTION PROCEEDS	3,620.00	10,000.00	13,402.00	3,402.00	134
001-369-0052	SPONSORSHIPS	6,000.00	0.00	0.00	0.00	0
001-369-0058	DONATIONS	11,664.25	0.00	27,798.81	27,798.81	0
001-369-0075	MULTI-PURPOSE FIELD RENTAL	0.00	0.00	1,959.13	1,959.13	0
001-369-0076	BASEBALL FIELD RENTAL	6,568.51	300.00	2,419.51	2,119.51	806
001-369-0078	FIELD PREPARATION FEES	1,620.00	500.00	450.00-	950.00-	90-
001-369-0792	PROGRAM REGISTRATION FEES	39,301.28	30,000.00	33,615.00	3,615.00	112
001-369-0794	CONCESSION / VENDOR FEES	620.00	0.00	0.00	0.00	0
001-369-0796	SPECIAL EVENT REGISTRATION FEES	30,156.37	15,000.00	29,842.00	14,842.00	199
001-369-2100	POLICE DEPT MISCELLANEOUS REVENUE	7,755.95	3,500.00	4,243.74	743.74	121
001-369-3700	MISCELLANEOUS POLICE DONATIONS	5,200.00	0.00	0.00	0.00	0
001-369-3740	FRDAP GRANT- M.L. KING PARK	0.00	0.00	50,000.00	50,000.00	0
001-369-3748	MISC. GRANTS/VESTS	7,600.00	2,500.00	0.00	2,500.00-	0
001-369-4000	FUEL TAX REFUND	17,519.89	10,000.00	10,386.88	386.88	104

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COMMISSION MEETING AUGUST 25 2025

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
001-380-1000	OTHR FINANCING SOURCE-INSURANCE PRO	21,489.96	0.00	246,817.37	246,817.37	0
001-382-1010	TRANSFER FROM INDUSTRIAL PARK	10,000.00	10,000.00	10,000.00	0.00	100
001-382-1013	TRANSFER FROM LAW ENFORCEMENT IMP F	412,800.00	412,800.00	412,800.00	0.00	100
001-389-5000	NON-OPERATIONAL CASH FORWARD-GEN FL	0.00	8,200,000.00	0.00	8,200,000.00-	0
GENERAL FUND Revenue Totals		35,925,427.85	47,461,560.00	37,477,443.04	9,984,116.96-	78

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
001-511-00-0000	LEGISLATIVE- CITY COMMISSION:	0.00	0.00	0.00	0.00	0
001-511-10-1200	SALARIES	51,185.79	53,441.00	48,547.47	4,893.53	91
001-511-10-2100	FICA EXPENSE	3,915.87	4,148.00	3,714.06	433.94	90
001-511-10-2200	RETIREMENT	30,035.76	31,360.00	28,085.45	3,274.55	90
001-511-10-2300	LIFE & HEALTH INSURANCE	285.00	0.00	261.25	261.25-	0
001-511-10-2600	WORKERS COMPENSATION INSURANCE	378.13	0.00	469.84	469.84-	0
001-511-30-3100	PROFESSIONAL SERVICES	2,365.00	6,000.00	1,293.75	4,706.25	22
001-511-30-4000	TRAVEL & PER DIEM	6,705.45	7,000.00	4,004.35	2,995.65	57
001-511-30-4100	TELEPHONE EXPENSE	1,089.58	2,000.00	1,076.95	923.05	54
001-511-30-4110	IT LICENSING / EQUIPMENT	5,474.39	8,220.00	3,589.22	4,630.78	44
001-511-30-4200	POSTAGE/TRANSPORTATION FEES	95.00	0.00	103.93	103.93-	0
001-511-30-4300	UTILITIES EXPENSE	1,030.21	1,800.00	1,555.66	244.34	86
001-511-30-4600	REPAIR & MAINTENANCE	0.00	500.00	0.00	500.00	0
001-511-30-4900	MISC. EXPENSE & OTHER CURRENT	0.00	2,500.00	632.71	1,867.29	25
001-511-30-5100	OFFICE SUPPLIES	0.00	150.00	0.00	150.00	0
001-511-30-5200	OPERATING SUPPLIES	64.00	400.00	0.00	400.00	0
001-511-30-5400	SUBSCRIPTIONS/DUES	4,851.87	6,600.00	6,611.80	11.80-	100
001-511-30-5500	TRAINING	2,050.00	2,800.00	2,550.00	250.00	91
001-511-60-6200	CAP. IMPROVEMENT-BUILDINGS	0.00	50,000.00	0.00	50,000.00	0

CITY OF WILDWOOD
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COMMISSION MEETING AUGUST 25 2025

08/20/2025
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Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
	511 LEGISLATIVE- CITY COMMISSION:	109,526.05	176,919.00	102,496.44	74,422.56	58
001-512-00-0000	EXECUTIVE- CITY MANAGER:	0.00	0.00	0.00	0.00	0
001-512-10-1200	SALARIES	433,738.97	581,477.00	401,599.09	179,877.91	69
001-512-10-1500	SICK LEAVE	11,907.39	0.00	11,550.15	11,550.15-	0
001-512-10-1600	VACATION PAY	28,844.41	0.00	37,033.90	37,033.90-	0
001-512-10-1800	HOLIDAY PAY	18,655.68	0.00	17,784.47	17,784.47-	0
001-512-10-2100	FICA EXPENSE	36,864.65	44,830.00	34,037.12	10,792.88	76
001-512-10-2200	RETIREMENT	135,161.07	157,341.00	125,445.73	31,895.27	80
001-512-10-2210	BENEFIT ADMIN FEES	108.00	0.00	103.50	103.50-	0
001-512-10-2300	LIFE & HEALTH INSURANCE	41,230.33	54,000.00	41,882.02	12,117.98	78
001-512-10-2600	WORKERS COMPENSATION INSURANCE	756.27	1,000.00	939.60	60.40	94
001-512-30-3100	PROFESSIONAL SERVICES	366,713.91	277,602.50	169,527.37	108,075.13	61
001-512-30-3450	CLOTHING AND UNIFORMS	303.00	750.00	291.95	458.05	39
001-512-30-4000	TRAVEL & PER DIEM	9,629.30	13,300.00	6,596.21	6,703.79	50
001-512-30-4100	TELEPHONE EXPENSE	4,074.65	5,000.00	3,067.43	1,932.57	61
001-512-30-4110	IT LICENSING / EQUIPMENT	22,683.57	24,140.00	22,516.54	1,623.46	93
001-512-30-4150	ADVERTISING/RECORDING EXPENSE	1,978.63	4,000.00	1,481.28	2,518.72	37
001-512-30-4200	POSTAGE/TRANSPORTATION FEES	659.73	1,000.00	173.43	826.57	17
001-512-30-4600	REPAIR & MAINTENANCE	2,010.48	5,800.00	3,785.67	2,014.33	65
001-512-30-4900	MISC. EXPENSE & OTHER CURRENT	411.99	2,500.00	938.71	1,561.29	38
001-512-30-5100	OFFICE SUPPLIES	836.92	2,100.00	1,058.86	1,041.14	50
001-512-30-5200	OPERATING SUPPLIES	2,520.18	7,250.00	1,109.69	6,140.31	15
001-512-30-5250	FUEL EXPENSE	160.37	500.00	71.25	428.75	14
001-512-30-5400	SUBSCRIPTIONS/DUES	3,844.66	6,300.00	3,944.30	2,355.70	63
001-512-30-5500	TRAINING	5,620.72	13,700.00	3,743.00	9,957.00	27
	512 EXECUTIVE- CITY MANAGER:	1,128,714.88	1,202,590.50	888,681.27	313,909.23	74

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Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
001-513-00-0000	CLERK/FINANCE DEPARTMENT:	0.00	0.00	0.00	0.00	0
001-513-10-1200	SALARIES	293,510.92	472,893.00	307,671.76	165,221.24	65
001-513-10-1300	OVERTIME	0.00	500.00	613.07	113.07-	123
001-513-10-1500	SICK LEAVE	10,033.94	0.00	11,965.81	11,965.81-	0
001-513-10-1600	VACATION PAY	17,960.48	0.00	22,305.49	22,305.49-	0
001-513-10-1800	HOLIDAY PAY	11,184.17	0.00	12,497.86	12,497.86-	0
001-513-10-2100	FICA EXPENSE	25,450.95	36,654.00	27,161.50	9,492.50	74
001-513-10-2200	RETIREMENT	50,380.56	70,001.00	53,426.79	16,574.21	76
001-513-10-2210	BENEFIT ADMIN FEES	54.00	0.00	99.00	99.00-	0
001-513-10-2300	LIFE & HEALTH INSURANCE	49,981.51	75,600.00	51,345.51	24,254.49	68
001-513-10-2500	UNEMPLOYMENT COMPENSATION	377.40	0.00	0.00	0.00	0
001-513-10-2600	WORKERS COMPENSATION INSURANCE	1,512.62	2,000.00	1,879.28	120.72	94
001-513-30-3100	PROFESSIONAL SERVICES	1,955.00	13,380.00	5,047.50	8,332.50	38
001-513-30-3200	ACCOUNTING/AUDITING FEE	22,500.00	35,000.00	25,125.00	9,875.00	72
001-513-30-3400	OTHER CONTRACTUAL SERVICES	13,546.15	27,710.00	22,559.68	5,150.32	81
001-513-30-4000	TRAVEL & PER DIEM	17.00	3,880.00	1,416.21	2,463.79	36
001-513-30-4100	TELEPHONE EXPENSE	5,487.11	7,500.00	5,364.63	2,135.37	72
001-513-30-4110	IT LICENSING / EQUIPMENT	67,302.38	65,250.00	49,377.61	15,872.39	76
001-513-30-4150	ADVERTISING/RECORDING EXPENSE	2,610.68	1,600.00	148.48	1,451.52	9
001-513-30-4200	POSTAGE/TRANSPORTATION FEES	1,842.48	7,850.00	3,055.43	4,794.57	39
001-513-30-4300	UTILITIES EXPENSE	17,991.77	30,000.00	17,486.38	12,513.62	58
001-513-30-4400	RENTAL & LEASING	3,806.70	7,500.00	1,026.82	6,473.18	14
001-513-30-4500	GENERAL INSURANCE	319,609.90	450,000.00	364,728.50	85,271.50	81
001-513-30-4600	REPAIR & MAINTENANCE	28,341.17	30,000.00	12,861.71	17,138.29	43
001-513-30-4900	MISC. EXPENSE & OTHER CURRENT	4,719.16	6,000.00	6,409.98	409.98-	107
001-513-30-4910	ELECTION EXPENSES	0.00	500.00	0.00	500.00	0
001-513-30-5100	OFFICE SUPPLIES	3,701.71	6,850.00	2,659.25	4,190.75	39

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001-513-30-5200	OPERATING SUPPLIES	6,468.48	8,200.00	4,985.21	3,214.79	61
001-513-30-5400	SUBSCRIPTIONS/DUES	187.50	2,100.00	1,653.50	446.50	79
001-513-30-5500	TRAINING	2,291.00	10,050.00	1,235.00	8,815.00	12
001-513-70-7100	DEBT SERVICE/CITY HALL-PRINCIPAL	115,380.09	118,240.00	58,756.60	59,483.40	50
001-513-70-7200	DEBT SERVICE/CITY HALL-INTEREST	19,047.44	16,200.00	8,457.18	7,742.82	52
001-513-70-7500	DEBT SERVICE/POLICE STATION-PRINCIPAL	235,452.36	241,640.00	241,637.77	2.23	100
001-513-70-7550	DEBT SERVICE/POLICE STATION-INTEREST	56,158.33	49,980.00	49,972.93	7.07	100
001-513-70-7600	DEBT SERV/2018 GEN FUND PROJ LOAN-PRII	339,576.44	345,960.00	345,956.20	3.80	100
001-513-70-7650	DEBT SERV/2018 GEN FUND PROJ LOAN-INTI	83,009.40	76,630.00	76,602.96	27.04	100
513 CLERK/FINANCE DEPARTMENT:		1,811,448.80	2,219,668.00	1,795,490.60	424,177.40	81
001-516-00-0000	DEVELOPMENT SERVICES:	0.00	0.00	0.00	0.00	0
001-516-10-1200	SALARIES	631,805.35	962,068.00	572,051.78	390,016.22	59
001-516-10-1300	OVERTIME	0.00	1,000.00	141.35	858.65	14
001-516-10-1500	SICK LEAVE	19,673.72	0.00	28,085.18	28,085.18-	0
001-516-10-1600	VACATION PAY	32,501.62	0.00	39,572.57	39,572.57-	0
001-516-10-1800	HOLIDAY PAY	23,839.25	0.00	23,834.03	23,834.03-	0
001-516-10-2100	FICA EXPENSE	54,147.63	72,604.00	51,183.14	21,420.86	70
001-516-10-2200	RETIREMENT	112,905.60	156,201.00	105,627.86	50,573.14	68
001-516-10-2210	BENEFIT ADMIN FEES	117.00	0.00	198.00	198.00-	0
001-516-10-2300	LIFE & HEALTH INSURANCE	96,094.34	145,800.00	88,735.59	57,064.41	61
001-516-10-2600	WORKERS COMPENSATION INSURANCE	2,268.89	3,000.00	2,818.88	181.12	94
001-516-30-3100	PROFESSIONAL SERVICES	961,993.72	846,175.00	454,691.73	391,483.27	54
001-516-30-3450	CLOTHING AND UNIFORMS	0.00	2,500.00	80.49	2,419.51	3
001-516-30-4000	TRAVEL & PER DIEM	4,996.02	13,000.00	3,831.76	9,168.24	29
001-516-30-4100	TELEPHONE EXPENSE	8,818.12	9,000.00	9,124.97	124.97-	101
001-516-30-4110	IT LICENSING / EQUIPMENT	81,279.35	69,020.00	57,376.97	11,643.03	83

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001-516-30-4150	ADVERTISING/RECORDING EXPENSE	23,838.34	35,200.00	31,274.28	3,925.72	89
001-516-30-4200	POSTAGE/TRANSPORTATION FEES	1,242.36	2,000.00	1,099.09	900.91	55
001-516-30-4600	REPAIR & MAINTENANCE	2,274.07	5,000.00	2,065.97	2,934.03	41
001-516-30-4900	MISC. EXPENSE & OTHER CURRENT	16,494.28	5,000.00	255.37	4,744.63	5
001-516-30-4950	CODE ENFORCEMENT	18,694.67	40,000.00	3,323.80	36,676.20	8
001-516-30-5100	OFFICE SUPPLIES	1,900.02	7,000.00	1,582.18	5,417.82	23
001-516-30-5200	OPERATING SUPPLIES	5,367.65	7,000.00	1,191.41	5,808.59	17
001-516-30-5250	FUEL EXPENSE	471.62	1,800.00	423.85	1,376.15	24
001-516-30-5400	SUBSCRIPTIONS/DUES	2,936.94	4,000.00	2,661.55	1,338.45	67
001-516-30-5500	TRAINING	6,929.09	25,000.00	5,038.60	19,961.40	20
516 DEVELOPMENT SERVICES:		2,110,589.65	2,412,368.00	1,486,270.40	926,097.60	62
001-518-00-0000	INFORMATION TECHNOLOGY DEPARTMENT	0.00	0.00	0.00	0.00	0
001-518-10-1200	SALARIES	212,735.02	274,463.00	199,984.68	74,478.32	73
001-518-10-1500	SICK LEAVE	6,178.18	0.00	13,157.57	13,157.57-	0
001-518-10-1600	VACATION PAY	13,343.88	0.00	10,928.88	10,928.88-	0
001-518-10-1800	HOLIDAY PAY	6,506.29	0.00	6,724.91	6,724.91-	0
001-518-10-2100	FICA EXPENSE	17,894.14	21,274.00	17,463.14	3,810.86	82
001-518-10-2200	RETIREMENT	32,440.13	37,411.00	31,629.17	5,781.83	85
001-518-10-2300	LIFE & HEALTH INSURANCE	33,567.97	43,200.00	33,167.67	10,032.33	77
001-518-10-2600	WORKERS COMPENSATION INSURANCE	302.51	500.00	497.23	2.77	99
001-518-30-3100	PROFESSIONAL SERVICES	12,452.00	45,000.00	7,690.58	37,309.42	17
001-518-30-3400	OTHER CONTRACTUAL SERVICES	4,650.67	11,000.00	1,823.34	9,176.66	17
001-518-30-4000	TRAVEL & PER DIEM	2,295.56	7,500.00	3,427.53	4,072.47	46
001-518-30-4100	TELEPHONE EXPENSE	7,740.25	8,500.00	7,081.99	1,418.01	83
001-518-30-4110	IT LICENSING / EQUIPMENT	13,300.85	26,310.00	16,093.87	10,216.13	61
001-518-30-4200	POSTAGE/TRANSPORTATION FEES	25.53	250.00	0.00	250.00	0

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Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
001-518-30-4300	UTILITIES EXPENSE	1,596.64	2,300.00	0.00	2,300.00	0
001-518-30-4600	REPAIR & MAINTENANCE	1,057.34	2,500.00	130.47	2,369.53	5
001-518-30-4900	MISC. EXPENSE & OTHER CURRENT	583.00	500.00	0.00	500.00	0
001-518-30-5100	OFFICE SUPPLIES	746.44	1,200.00	148.05	1,051.95	12
001-518-30-5200	OPERATING SUPPLIES	5,070.20	7,500.00	1,135.27	6,364.73	15
001-518-30-5250	FUEL EXPENSE	0.00	0.00	38.79	38.79-	0
001-518-30-5400	SUBSCRIPTIONS/DUES	522.33	2,500.00	390.00	2,110.00	16
001-518-30-5500	TRAINING	1,449.00	12,000.00	1,253.40	10,746.60	10
001-518-30-5550	LICENSING	13,457.69	50,000.00	7,517.64	42,482.36	15
001-518-60-6400	CAP. IMPROVEMENTS-MACHINERY/EQUIP	8,505.59	0.00	0.00	0.00	0
	518 INFORMATION TECHNOLOGY DEPARTMENT	396,421.21	553,908.00	360,284.18	193,623.82	65
001-519-00-0000	HUMAN RESOURCE DEPARTMENT:	0.00	0.00	0.00	0.00	0
001-519-10-1200	SALARIES	161,529.54	216,128.00	167,723.56	48,404.44	78
001-519-10-1500	SICK LEAVE	6,062.51	0.00	2,492.94	2,492.94-	0
001-519-10-1600	VACATION PAY	7,752.71	0.00	8,818.99	8,818.99-	0
001-519-10-1800	HOLIDAY PAY	6,595.46	0.00	7,073.78	7,073.78-	0
001-519-10-2100	FICA EXPENSE	13,918.15	16,751.00	14,237.42	2,513.58	85
001-519-10-2200	RETIREMENT	24,720.40	29,460.00	25,503.05	3,956.95	87
001-519-10-2210	BENEFIT ADMIN FEES	54.00	0.00	99.00	99.00-	0
001-519-10-2300	LIFE & HEALTH INSURANCE	20,947.66	32,400.00	24,899.69	7,500.31	77
001-519-10-2600	WORKERS COMPENSATION INSURANCE	166.34	350.00	301.49	48.51	86
001-519-30-3100	PROFESSIONAL SERVICES	13,401.25	15,000.00	0.00	15,000.00	0
001-519-30-3400	OTHER CONTRACTUAL SERVICES	5,601.33	6,650.00	5,197.10	1,452.90	78
001-519-30-4000	TRAVEL & PER DIEM	2,888.74	8,500.00	2,423.62	6,076.38	29
001-519-30-4100	TELEPHONE EXPENSE	5,300.79	5,000.00	4,492.29	507.71	90
001-519-30-4110	IT LICENSING / EQUIPMENT	45,221.68	60,400.00	22,291.97	38,108.03	37

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001-519-30-4150	ADVERTISING/RECRUITING	9,023.88	8,500.00	4,367.61	4,132.39	51
001-519-30-4200	POSTAGE/TRANSPORTATION FEES	158.23	500.00	222.62	277.38	45
001-519-30-4300	UTILITIES EXPENSE	1,596.65	2,300.00	1,450.40	849.60	63
001-519-30-4600	REPAIR & MAINTENANCE	5,487.30	5,500.00	4,633.12	866.88	84
001-519-30-4800	EMPLOYEE PROGRAMS	12,661.68	18,740.00	14,161.23	4,578.77	76
001-519-30-4900	MISC. EXPENSE & OTHER CURRENT	752.29	1,000.00	746.76	253.24	75
001-519-30-5100	OFFICE SUPPLIES	1,828.70	1,500.00	791.59	708.41	53
001-519-30-5200	OPERATING SUPPLIES	2,759.59	4,950.00	2,013.34	2,936.66	41
001-519-30-5250	FUEL EXPENSE	262.89	600.00	179.06	420.94	30
001-519-30-5400	SUBSCRIPTIONS/DUES	1,679.68	2,060.00	2,059.00	1.00	100
001-519-30-5500	TRAINING	3,676.73	5,330.00	6,375.43	1,045.43-	120
001-519-30-5501	STAFF TRAINING PROGRAMS	1,233.93	6,650.00	26.51	6,623.49	0
519 HUMAN RESOURCE DEPARTMENT:		355,282.11	448,269.00	322,581.57	125,687.43	72
001-521-00-0000	POLICE DEPARTMENT:	0.00	0.00	0.00	0.00	0
001-521-10-1200	SALARIES	3,006,269.68	4,992,735.00	3,039,818.10	1,952,916.90	61
001-521-10-1220	UNIFORM ALLOWANCE	16,530.00	21,565.00	14,520.00	7,045.00	67
001-521-10-1250	ON CALL	11,550.00	13,000.00	11,125.00	1,875.00	86
001-521-10-1260	SHIFT DIFFERENTIAL	14,784.74	20,100.00	14,212.86	5,887.14	71
001-521-10-1300	OVERTIME	147,305.59	160,000.00	144,813.50	15,186.50	91
001-521-10-1500	SICK LEAVE	68,753.71	0.00	89,036.80	89,036.80-	0
001-521-10-1600	VACATION PAY	134,587.42	0.00	130,884.27	130,884.27-	0
001-521-10-1700	INCENTIVE PAY	26,280.00	56,000.00	23,540.00	32,460.00	42
001-521-10-1800	HOLIDAY PAY	111,346.00	0.00	117,873.41	117,873.41-	0
001-521-10-1820	HOLIDAY PREMIUM	100,436.45	100,000.00	185,509.68	85,509.68-	186
001-521-10-2100	FICA EXPENSE	278,422.76	378,514.00	289,090.35	89,423.65	76
001-521-10-2200	RETIREMENT	1,110,463.49	1,563,616.00	1,155,889.04	407,726.96	74

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001-521-10-2210	BENEFIT ADMIN FEES	531.00	0.00	774.00	774.00-	0
001-521-10-2300	LIFE & HEALTH INSURANCE	467,259.60	756,000.00	449,131.56	306,868.44	59
001-521-10-2600	WORKERS COMPENSATION INSURANCE	113,444.82	120,000.00	112,755.19	7,244.81	94
001-521-30-3100	PROFESSIONAL SERVICES	48,179.45	52,000.00	21,825.51	30,174.49	42
001-521-30-3400	OTHER CONTRACTUAL SERVICES	39,271.02	92,000.00	41,694.78	50,305.22	45
001-521-30-3450	CLOTHING AND UNIFORMS	18,236.27	25,000.00	11,058.53	13,941.47	44
001-521-30-3500	INVESTIGATIONS	9,528.29	17,000.00	11,253.80	5,746.20	66
001-521-30-4000	TRAVEL & PER DIEM	13,720.41	15,000.00	12,301.80	2,698.20	82
001-521-30-4100	TELEPHONE EXPENSE	68,555.66	107,000.00	71,377.93	35,622.07	67
001-521-30-4110	IT LICENSING / EQUIPMENT	258,989.36	253,830.00	219,515.94	34,314.06	86
001-521-30-4200	POSTAGE/TRANSPORTATION FEES	512.68	2,000.00	410.91	1,589.09	21
001-521-30-4300	UTILITIES EXPENSE	60,415.67	65,000.00	49,330.09	15,669.91	76
001-521-30-4400	RENTAL & LEASING	1,452.57	5,000.00	2,038.78	2,961.22	41
001-521-30-4600	REPAIR & MAINTENANCE	70,695.80	90,000.00	45,164.23	44,835.77	50
001-521-30-4900	MISC. EXPENSE & OTHER CURRENT	0.00	4,000.00	0.00	4,000.00	0
001-521-30-4960	BOOT ALLOWANCE	2,368.21	11,000.00	2,247.15	8,752.85	20
001-521-30-5100	OFFICE SUPPLIES	2,172.11	5,000.00	1,851.72	3,148.28	37
001-521-30-5200	OPERATING SUPPLIES	51,989.82	85,000.00	67,755.70	17,244.30	80
001-521-30-5250	FUEL EXPENSE	154,018.57	200,000.00	130,675.74	69,324.26	65
001-521-30-5400	SUBSCRIPTIONS/DUES	1,678.55	4,500.00	4,601.67	101.67-	102
001-521-30-5500	TRAINING	14,045.20	40,000.00	32,464.87	7,535.13	81
001-521-60-6400	CAP. IMPROVEMENT-MACHINERY	530,245.09	466,400.00	385,093.40	81,306.60	83
	521 POLICE DEPARTMENT:	6,954,039.99	9,721,260.00	6,889,636.31	2,831,623.69	71
001-541-00-0000	PUBLIC WORKS/STREET DEPT.	0.00	0.00	0.00	0.00	0
001-541-10-1200	SALARIES	1,282,196.57	1,618,584.00	1,099,286.47	519,297.53	68
001-541-10-1250	ON CALL	6,400.00	6,500.00	5,750.00	750.00	88

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001-541-10-1300	OVERTIME	22,268.31	12,000.00	15,612.89	3,612.89-	130
001-541-10-1500	SICK LEAVE	52,339.30	0.00	51,646.35	51,646.35-	0
001-541-10-1600	VACATION PAY	77,708.85	0.00	72,265.04	72,265.04-	0
001-541-10-1800	HOLIDAY PAY	48,153.59	0.00	46,106.65	46,106.65-	0
001-541-10-1820	HOLIDAY PREMIUM	2,243.29	0.00	48,123.53	48,123.53-	0
001-541-10-2100	FICA EXPENSE	114,024.95	125,526.00	102,094.71	23,431.29	81
001-541-10-2200	RETIREMENT	236,602.74	250,928.00	213,205.75	37,722.25	85
001-541-10-2210	BENEFIT ADMIN FEES	40.50	0.00	90.00	90.00-	0
001-541-10-2300	LIFE & HEALTH INSURANCE	218,840.33	286,200.00	202,582.34	83,617.66	71
001-541-10-2600	WORKERS COMPENSATION INSURANCE	37,814.94	40,000.00	37,585.09	2,414.91	94
001-541-30-3100	PROFESSIONAL SERVICES	201,498.54	363,671.23	157,425.41	206,245.82	43
001-541-30-3400	OTHER CONTRACTUAL SERVICES	947,306.39	430,200.00	196,553.12	233,646.88	46
001-541-30-3440	RIGHT-OF-WAY MAINTENANCE	397,332.85	450,800.00	329,267.11	121,532.89	73
001-541-30-3450	CLOTHING AND UNIFORMS	8,463.51	8,000.00	5,894.40	2,105.60	74
001-541-30-4000	TRAVEL & PER DIEM	549.26	2,500.00	1,269.73	1,230.27	51
001-541-30-4100	TELEPHONE EXPENSE	25,622.35	24,600.00	21,258.80	3,341.20	86
001-541-30-4110	IT LICENSING / EQUIPMENT	58,906.96	92,430.00	48,151.46	44,278.54	52
001-541-30-4200	POSTAGE/TRANSPORTATION FEES	67.09	150.00	203.85	53.85-	136
001-541-30-4300	UTILITIES EXPENSE	30,672.03	26,200.00	140,727.96	114,527.96-	537
001-541-30-4350	VILLAGES STREET LIGHTING	609,549.02	1,332,400.00	1,267,706.07	64,693.93	95
001-541-30-4400	RENTAL & LEASING	24,472.05	22,580.00	15,024.88	7,555.12	67
001-541-30-4600	REPAIR & MAINTENANCE	54,591.59	71,050.00	61,705.15	9,344.85	87
001-541-30-4601	REPAIR & MAINTENANCE - BUILDINGS	5,656.09	20,000.00	8,030.54	11,969.46	40
001-541-30-4603	PAVEMENT PRESERVATION/REHABILITATION	435,942.74	1,439,609.00	1,431,381.67	8,227.33	99
001-541-30-4900	MISC. EXPENSE & OTHER CURRENT	0.00	3,000.00	0.00	3,000.00	0
001-541-30-4940	LANDFILL DISPOSAL FEES	4,791.05	10,000.00	6,933.31	3,066.69	69
001-541-30-4960	BOOT ALLOWANCE	3,181.87	4,030.00	2,435.42	1,594.58	60

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001-541-30-5100	OFFICE SUPPLIES	2,044.76	3,000.00	1,957.28	1,042.72	65
001-541-30-5200	OPERATING SUPPLIES	72,811.12	80,100.00	71,335.76	8,764.24	89
001-541-30-5250	FUEL EXPENSE	29,354.78	35,000.00	23,834.10	11,165.90	68
001-541-30-5400	SUBSCRIPTIONS/DUES	6,866.51	11,350.00	6,805.13	4,544.87	60
001-541-30-5500	TRAINING	12,335.76	27,100.00	10,990.62	16,109.38	41
001-541-60-6115	CITY HALL / ANNEX REHAB	19,543.08	0.00	0.00	0.00	0
001-541-60-6200	CAP. IMPROVEMENT-BUILDINGS	51,526.72	0.00	0.00	0.00	0
001-541-60-6300	CAPITAL IMPROVEMENT-OTHER	74,069.96	0.00	0.00	0.00	0
001-541-60-6400	CAP. IMPROVEMENT-MACHINERY	228,974.86	73,500.00	67,369.44	6,130.56	92
001-541-60-6681	PRINCIPAL-EQUIPMENT LEASE	29,231.37	0.00	0.00	0.00	0
001-541-60-6691	INTEREST-EQUIPMENT LEASE	1,100.13	0.00	0.00	0.00	0
541 PUBLIC WORKS/STREET DEPT.		5,435,095.81	6,871,008.23	5,770,610.03	1,100,398.20	84
001-549-00-0000	FLEET MAINTENANCE DEPT:	0.00	0.00	0.00	0.00	0
001-549-10-1200	SALARIES	238,915.58	297,335.00	221,169.93	76,165.07	74
001-549-10-1300	OVERTIME	357.18	1,500.00	0.00	1,500.00	0
001-549-10-1500	SICK LEAVE	8,446.78	0.00	3,584.18	3,584.18-	0
001-549-10-1600	VACATION PAY	18,481.69	0.00	18,703.45	18,703.45-	0
001-549-10-1800	HOLIDAY PAY	9,390.89	0.00	8,823.63	8,823.63-	0
001-549-10-2100	FICA EXPENSE	21,082.21	23,048.00	19,299.99	3,748.01	84
001-549-10-2200	RETIREMENT	37,440.18	40,530.00	34,570.35	5,959.65	85
001-549-10-2210	BENEFIT ADMIN FEES	108.00	0.00	49.50	49.50-	0
001-549-10-2300	LIFE & HEALTH INSURANCE	45,166.45	54,000.00	42,072.63	11,927.37	78
001-549-10-2600	WORKERS COMPENSATION INSURANCE	12,403.31	15,000.00	14,094.39	905.61	94
001-549-30-3100	PROFESSIONAL SERVICES	0.00	500.00	0.00	500.00	0
001-549-30-3400	OTHER CONTRACTUAL SERVICES	7,426.80	10,200.00	5,155.80	5,044.20	51
001-549-30-3450	CLOTHING AND UNIFORMS	2,665.16	3,500.00	1,921.56	1,578.44	55

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001-549-30-4000	TRAVEL & PER DIEM	0.00	100.00	0.00	100.00	0
001-549-30-4100	TELEPHONE EXPENSE	1,948.97	3,500.00	1,883.03	1,616.97	54
001-549-30-4110	IT LICENSING / EQUIPMENT	23,006.69	52,580.00	22,384.69	30,195.31	43
001-549-30-4200	POSTAGE/TRANSPORTATION FEES	24.20	100.00	0.00	100.00	0
001-549-30-4300	UTILITIES EXPENSE	4,372.77	7,000.00	3,875.95	3,124.05	55
001-549-30-4400	RENTAL & LEASING	1,590.38	2,500.00	1,731.37	768.63	69
001-549-30-4600	REPAIR & MAINTENANCE	4,486.40	5,000.00	1,124.42	3,875.58	22
001-549-30-4900	MISC. EXPENSE & OTHER CURRENT	0.00	100.00	0.00	100.00	0
001-549-30-4960	BOOT ALLOWANCE	350.00	700.00	274.88	425.12	39
001-549-30-5100	OFFICE SUPPLIES	386.62	1,500.00	196.33	1,303.67	13
001-549-30-5200	OPERATING SUPPLIES	36,521.67	80,000.00	62,479.46	17,520.54	78
001-549-30-5250	FUEL EXPENSE	3,375.55	4,000.00	2,819.49	1,180.51	70
001-549-30-5400	SUBSCRIPTIONS/DUES	314.00	800.00	323.00	477.00	40
001-549-30-5500	TRAINING	575.00	2,500.00	1,699.00	801.00	68
001-549-60-6400	CAP. IMPROVEMENTS-MACHINERY/EQUIP	28,196.44	0.00	0.00	0.00	0
	549 FLEET MAINTENANCE DEPT:	507,032.92	605,993.00	468,237.03	137,755.97	77
001-572-00-0000	PARKS & RECREATION:	0.00	0.00	0.00	0.00	0
001-572-10-1200	SALARIES	662,626.42	1,056,402.00	723,290.07	333,111.93	68
001-572-10-1250	ON CALL	5,900.00	6,500.00	5,750.00	750.00	88
001-572-10-1300	OVERTIME	11,799.47	2,000.00	13,121.48	11,121.48-	656
001-572-10-1500	SICK LEAVE	14,672.97	0.00	14,643.78	14,643.78-	0
001-572-10-1600	VACATION PAY	33,372.18	0.00	27,931.85	27,931.85-	0
001-572-10-1800	HOLIDAY PAY	23,382.46	0.00	27,294.90	27,294.90-	0
001-572-10-1820	HOLIDAY PREMIUM	3,552.27	0.00	45.48	45.48-	0
001-572-10-2100	FICA EXPENSE	58,247.79	76,642.00	63,267.73	13,374.27	83
001-572-10-2200	RETIREMENT	100,839.03	171,109.00	107,551.20	63,557.80	63

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001-572-10-2210	BENEFIT ADMIN FEES	18.00	0.00	148.50	148.50-	0
001-572-10-2300	LIFE & HEALTH INSURANCE	135,894.81	216,000.00	143,141.14	72,858.86	66
001-572-10-2600	WORKERS COMPENSATION INSURANCE	9,831.92	13,000.00	12,215.11	784.89	94
001-572-30-3100	PROFESSIONAL SERVICES	7,134.60	14,000.00	7,510.89	6,489.11	54
001-572-30-3400	OTHER CONTRACTUAL SERVICES	172,400.28	204,900.00	165,570.71	39,329.29	81
001-572-30-3450	CLOTHING AND UNIFORMS	7,495.37	10,150.00	8,966.73	1,183.27	88
001-572-30-4000	TRAVEL & PER DIEM	580.34	4,550.00	1,796.36	2,753.64	39
001-572-30-4100	TELEPHONE EXPENSE	30,076.33	28,500.00	28,742.71	242.71-	101
001-572-30-4110	IT LICENSING / EQUIPMENT	43,658.29	44,000.00	27,139.41	16,860.59	62
001-572-30-4150	ADVERTISING AND PROMOTIONS	24,109.30	25,000.00	21,937.56	3,062.44	88
001-572-30-4200	POSTAGE/TRANSPORTATION FEES	11.25	150.00	3.45	146.55	2
001-572-30-4300	UTILITIES EXPENSE	39,366.62	40,000.00	34,851.83	5,148.17	87
001-572-30-4400	RENTAL & LEASING	8,242.82	6,900.00	3,433.53	3,466.47	50
001-572-30-4600	REPAIR & MAINTENANCE	68,872.93	100,750.00	52,070.26	48,679.74	52
001-572-30-4601	REPAIR & MAINTENANCE - BUILDINGS	26,032.18	38,000.00	8,334.65	29,665.35	22
001-572-30-4610	BAKER HOUSE MAINTENANCE	1,803.37	10,000.00	1,608.09	8,391.91	16
001-572-30-4620	BAKER HOUSE OPERATIONS-OTHER MISC.	2,379.63	5,300.00	3,001.89	2,298.11	57
001-572-30-4630	BAKER HOUSE SPECIAL EVENTS	7,886.54	12,000.00	10,684.90	1,315.10	89
001-572-30-4900	MISC. EXPENSE & OTHER CURRENT	88.26-	5,000.00	0.00	5,000.00	0
001-572-30-4910	SPECIAL EVENTS	136,448.14	170,000.00	169,305.41	694.59	100
001-572-30-4915	ATHLETIC LEAGUES & ACTIVITIES	104,460.49	109,400.00	112,512.01	3,112.01-	103
001-572-30-4920	YOUTH CAMPS & PROGRAMS	20,292.81	52,500.00	27,950.49	24,549.51	53
001-572-30-4960	BOOT ALLOWANCE	1,224.04	2,450.00	1,536.66	913.34	63
001-572-30-5100	OFFICE SUPPLIES	2,908.67	4,500.00	2,152.59	2,347.41	48
001-572-30-5200	OPERATING SUPPLIES	74,262.12	88,500.00	88,308.24	191.76	100
001-572-30-5250	FUEL EXPENSE	23,953.89	25,000.00	13,033.73	11,966.27	52
001-572-30-5280	LANDSCAPING	12,730.17	62,000.00	28,605.42	33,394.58	46

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001-572-30-5400	SUBSCRIPTIONS/DUES	867.83	2,460.00	1,256.80	1,203.20	51
001-572-30-5500	TRAINING	7,536.23	9,250.00	3,938.83	5,311.17	43
001-572-60-6200	CAP. IMPROVEMENT-BUILDINGS	9,772.26	0.00	0.00	0.00	0
001-572-60-6300	CAPITAL IMPROVEMENT-OTHER	8,999.92	0.00	0.00	0.00	0
001-572-60-6400	CAP. IMPROVEMENT-MACHINERY	105,095.10	132,100.00	121,352.04	10,747.96	92
	572 PARKS & RECREATION:	2,008,650.58	2,749,013.00	2,084,006.43	665,006.57	76
001-575-00-0000	COMMUNITY CENTER:	0.00	0.00	0.00	0.00	0
001-575-10-1200	SALARIES	75,050.33	129,843.00	80,570.36	49,272.64	62
001-575-10-1300	OVERTIME	225.00	0.00	317.45	317.45-	0
001-575-10-1500	SICK LEAVE	0.00	0.00	43.67	43.67-	0
001-575-10-1600	VACATION PAY	0.00	0.00	322.99	322.99-	0
001-575-10-1800	HOLIDAY PAY	197.00	0.00	530.92	530.92-	0
001-575-10-2100	FICA EXPENSE	5,774.00	10,070.00	5,107.97	4,962.03	51
001-575-10-2200	RETIREMENT	9,241.71	17,700.00	11,259.00	6,441.00	64
001-575-10-2300	LIFE & HEALTH INSURANCE	9.50	0.00	1,063.30-	1,063.30	0
001-575-30-3100	PROFESSIONAL SERVICES	176.29	3,000.00	0.00	3,000.00	0
001-575-30-3400	OTHER CONTRACTUAL SERVICES	20,173.73	15,000.00	17,221.00	2,221.00-	115
001-575-30-3450	CLOTHING AND UNIFORMS	845.36	1,200.00	0.00	1,200.00	0
001-575-30-4100	TELEPHONE EXPENSE	0.00	6,680.00	513.35	6,166.65	8
001-575-30-4200	POSTAGE/TRANSPORTATION FEES	3.30	150.00	0.69	149.31	0
001-575-30-4300	UTILITIES EXPENSE	56,441.03	45,000.00	50,954.83	5,954.83-	113
001-575-30-4400	RENTAL & LEASING	2,210.33	4,500.00	1,357.36	3,142.64	30
001-575-30-4600	REPAIR & MAINTENANCE	49,583.59	50,000.00	14,278.78	35,721.22	29
001-575-30-5100	OFFICE SUPPLIES	504.23	1,000.00	0.00	1,000.00	0
001-575-30-5200	OPERATING SUPPLIES	18,789.56	20,000.00	20,014.34	14.34-	100
001-575-30-5400	SUBSCRIPTIONS/DUES	100.00	100.00	100.00	0.00	100

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001-575-60-6200	CAP. IMPROVEMENT-BUILDINGS	43,000.03	56,900.70	56,958.03	57.33-	100
	575 COMMUNITY CENTER:	282,324.99	361,143.70	258,487.44	102,656.26	72
001-580-90-9901	CONTINGENCY RESERVE-GEN FUND	0.00	3,917,539.51	0.00	3,917,539.51	0
001-581-00-1040	TRANSFER TO EXPANDED CRA	215,690.00	231,880.00	247,524.97	15,644.97-	107
001-581-00-4020	TRANSFER TO UTILITY CAP PROJECTS FUND	3,000,000.00	6,000,000.00	6,000,000.00	0.00	100
001-581-90-3010	TRANSFER TO CAPITAL PROJECT FUND	15,700,000.00	10,000,000.00	10,000,000.00	0.00	100
	581 Total	18,915,690.00	16,231,880.00	16,247,524.97	15,644.97-	100
	GENERAL FUND Expenditure Totals	40,014,816.99	47,471,559.94	36,674,306.67	10,797,253.27	77

001 GENERAL FUND	Prior	YTD
Revenues:	35,925,427.85	37,477,443.04
Expenditures:	40,014,816.99	36,674,306.67
Net Income:	4,089,389.14-	803,136.37

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
101-361-1350	INTEREST EARNED	255.76	200.00	186.16	13.84-	93
101-366-1350	CONTRIBUTIONS/DUES	1,450.00	2,000.00	1,325.00	675.00-	66
101-366-1360	GRAVE OPENING PERMITS	900.00	600.00	1,200.00	600.00	200
101-389-5000	NON-OPER/ CEMETERY RESERVES FORWAR	0.00	64,000.00	0.00	64,000.00-	0
CEMETERY FUND Revenue Totals		2,605.76	66,800.00	2,711.16	64,088.84-	4

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
101-569-00-0000	GREENWOOD CEMETERY:	0.00	0.00	0.00	0.00	0
101-569-30-4600	REPAIR & MAINTENANCE	0.00	500.00	0.00	500.00	0
101-569-30-4900	MISC. EXPENSE & OTHER CURRENT	0.00	200.00	7.53	192.47	4
101-569-30-5200	OPERATING SUPPLIES	0.00	100.00	0.00	100.00	0
569 GREENWOOD CEMETERY:		0.00	800.00	7.53	792.47	1
101-580-90-9999	CONTINGENCY	0.00	66,000.00	0.00	66,000.00	0
CEMETERY FUND Expenditure Totals		0.00	66,800.00	7.53	66,792.47	0

101 CEMETERY FUND	Prior	YTD
Revenues:	2,605.76	2,711.16
Expenditures:	0.00	7.53
Net Income:	2,605.76	2,703.63

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
104-361-0000	INTEREST	17,309.79	5,000.00	17,111.34	12,111.34	342
104-369-9000	TAX INCREMENT FINANCING - SUM CTY	395,695.00	405,500.00	427,869.00	22,369.00	106
104-382-0010	TRANSFER FROM GENERAL	215,690.00	231,880.00	247,524.97	15,644.97	107
104-389-5006	CASH FORWARD - CRA DISTRICT	0.00	1,964,000.00	0.00	1,964,000.00-	0
COMMUNITY REDEVELOPMENT Revenue Tot		628,694.79	2,606,380.00	692,505.31	1,913,874.69-	26

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
104-550-00-0000	COMM REDEVELOPMENT DEPT.:	0.00	0.00	0.00	0.00	0
104-550-10-1200	SALARIES	45,480.57	73,893.00	39,919.56	33,973.44	54
104-550-10-1500	SICK LEAVE	773.95	0.00	2,300.97	2,300.97-	0
104-550-10-1600	VACATION PAY	4,837.72	0.00	5,657.19	5,657.19-	0
104-550-10-1800	HOLIDAY PAY	1,831.18	0.00	1,718.12	1,718.12-	0
104-550-10-2100	FICA EXPENSE	4,048.66	5,659.00	3,794.10	1,864.90	67
104-550-10-2200	RETIREMENT	18,269.18	25,510.00	17,008.03	8,501.97	67
104-550-10-2300	LIFE & HEALTH INSURANCE	3,784.56	3,888.00	3,529.60	358.40	91
104-550-30-4000	TRAVEL & PER DIEM	0.00	750.00	0.00	750.00	0
104-550-30-5400	SUBSCRIPTIONS/DUES	175.00	200.00	0.00	200.00	0
104-550-30-5500	TRAINING	0.00	1,500.00	0.00	1,500.00	0
104-550-60-6330	FACADE IMPROVEMENT GRANT	3,891.36	40,000.00	2,180.00	37,820.00	5
104-550-60-6390	OTHER MISC PROJECTS	0.00	500,000.00	878,272.15	378,272.15-	176
104-550-70-7303	DEMOLITIONS	0.00	25,000.00	0.00	25,000.00	0
104-550-70-7307	MISC. OTHER PROJECTS	8,679.00	0.00	0.00	0.00	0
550 COMM REDEVELOPMENT DEPT.:		91,771.18	676,400.00	954,379.72	277,979.72-	141
104-580-90-9904	CONTINGENCY - CRA DISTRICT	0.00	1,929,980.00	0.00	1,929,980.00	0
COMMUNITY REDEVELOPMENT Expenditure		91,771.18	2,606,380.00	954,379.72	1,652,000.28	37

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104 COMMUNITY REDEVELOPMENT	Prior	YTD
Revenues:	628,694.79	692,505.31
Expenditures:	91,771.18	954,379.72
Net Income:	536,923.61	261,874.41 -

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
105-361-0000	INTEREST	13.58	100.00	46.20	53.80-	46
105-369-0058	DONATIONS	27,072.00	15,000.00	23,745.00	8,745.00	158
105-389-5010	CASH FORWARD - BAKER HOUSE	0.00	76,800.00	0.00	76,800.00-	0
BAKER HOUSE Revenue Totals		27,085.58	91,900.00	23,791.20	68,108.80-	25

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
105-576-00-0000	BAKER HOUSE DEPARTMENT:	0.00	0.00	0.00	0.00	0
105-576-30-4620	BAKER HOUSE OPERATIONS	79.09	900.00	21,910.24	21,010.24-	***
105-580-90-9910	CONTINGENCY - BAKER HOUSE	0.00	91,000.00	0.00	91,000.00	0
BAKER HOUSE Expenditure Totals		79.09	91,900.00	21,910.24	69,989.76	24

105 BAKER HOUSE	Prior	YTD
Revenues:	27,085.58	23,791.20
Expenditures:	79.09	21,910.24
Net Income:	27,006.49	1,880.96

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
107-341-3004	RECREATION IMPACT FEES	301,196.34	300,000.00	188,982.34	111,017.66-	63
107-361-0000	INTEREST	10,584.59	2,000.00	10,075.07	8,075.07	504
107-389-5004	CASH FORWARD - P & R IMPACT FEE	0.00	972,500.00	0.00	972,500.00-	0
RECREATION IMPACT FEES Revenue Totals		311,780.93	1,274,500.00	199,057.41	1,075,442.59-	15

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
107-572-00-0000	RECREATION IMPACT FEES:	0.00	0.00	0.00	0.00	0
107-580-90-9903	CONTINGENCY - P&R IMPACT FEES	0.00	1,274,500.00	0.00	1,274,500.00	0
RECREATION IMPACT FEES Expenditure Tota		0.00	1,274,500.00	0.00	1,274,500.00	0

107 RECREATION IMPACT FEES	Prior	YTD
Revenues:	311,780.93	199,057.41
Expenditures:	0.00	0.00
Net Income:	311,780.93	199,057.41

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
108-341-3001	LAW ENFORCEMENT IMPACT FEES	1,064,545.58	1,240,000.00	1,063,085.93	176,914.07 -	86
108-361-0000	INTEREST	207.47	0.00	199.52	199.52	0
108-389-5002	CASH FORWARD - POLICE IMPACT FEE	0.00	1,925,300.00	0.00	1,925,300.00 -	0
LAW ENFORCEMENT IMPACT FEES Revenue		1,064,753.05	3,165,300.00	1,063,285.45	2,102,014.55 -	33

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
108-521-00-0000	LAW ENFORCEMENT IMPACT FEES:	0.00	0.00	0.00	0.00	0
108-521-30-4900	MISC. EXPENSE & OTHER CURRENT	406.87	0.00	337.71	337.71 -	0
108-521-60-6200	CAP.IMPROVEMENT-BUILDINGS	0.00	400,000.00	0.00	400,000.00	0
108-521-60-6400	CAP. IMPROVEMENT- MACHINERY & EQUIPM	621,471.89	0.00	0.00	0.00	0
108-521-70-9105	TRANSFER TO GENERAL FUND - LOAN PAYM	412,800.00	412,800.00	412,800.00	0.00	100
521 LAW ENFORCEMENT IMPACT FEES:		1,034,678.76	812,800.00	413,137.71	399,662.29	51
108-580-90-9902	CONTINGENCY -LAW ENFORCEMENT IMPAC	0.00	2,352,500.00	0.00	2,352,500.00	0
LAW ENFORCEMENT IMPACT Expenditure To		1,034,678.76	3,165,300.00	413,137.71	2,752,162.29	13

108 LAW ENFORCEMENT IMPACT FEES	Prior	YTD
Revenues:	1,064,753.05	1,063,285.45
Expenditures:	1,034,678.76	413,137.71
Net Income:	30,074.29	650,147.74

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
301-331-9000	FEDERAL GRANT REVENUE	0.00	675,000.00	0.00	675,000.00-	0
301-334-9000	STATE GRANT REVENUE	0.00	650,000.00	0.00	650,000.00-	0
301-361-0000	INTEREST	174,366.58	10,000.00	121,528.29	111,528.29	***
301-382-0010	TRANSFER FROM GENERAL FUND	15,700,000.00	10,000,000.00	10,000,000.00	0.00	100
301-389-5000	NON-OPERATIONAL CASH FORWARD-CAP.IM	0.00	14,598,500.00	0.00	14,598,500.00-	0
CAPITAL IMPROVEMENT FUND Revenue Totals		15,874,366.58	25,933,500.00	10,121,528.29	15,811,971.71-	39

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
301-500-00-0000	CAPITAL IMPROVEMENT FUND	0.00	0.00	0.00	0.00	0
301-511-60-6201	ANNEX NO. 2 REHAB	41.78	0.00	0.00	0.00	0
301-516-60-6301	DOWNTOWN MASTER PLAN PROJECTS	855,347.76	325,000.00	13,237.23	311,762.77	4
301-516-60-6304	TRAILWINDS FOUNTAIN	559.82	0.00	0.00	0.00	0
516 Total		855,907.58	325,000.00	13,237.23	311,762.77	4

301-521-60-6301	POLICE DEPARTMENT HQ MONUMENT SIGN	21,713.00	0.00	0.00	0.00	0
301-541-60-6101	DRAINAGE PROJECT LAND ACQUISITION	229,393.67	514,420.00	264,222.89	250,197.11	51
301-541-60-6202	MUNICIPAL SERVICES COMPLEX PROJECT	128,115.87	0.00	0.00	0.00	0
301-541-60-6204	PW BUILDING HVAC UPGRADES	110,940.00	0.00	0.00	0.00	0
301-541-60-6206	PUBLIC WORKS DEPARTMENT ANNEX	0.00	100,000.00	0.00	100,000.00	0
301-541-60-6301	PLEASANTDALE REHAB	377,429.51	0.00	0.00	0.00	0
301-541-60-6302	BARWICK REHAB	29,468.20	55,000.00	14,335.67	40,664.33	26
301-541-60-6303	OAK GROVE VILLAGE DRAINAGE IMPROVEM	36,220.00	949,650.00	39,761.92	909,888.08	4
301-541-60-6305	PAVEMENT PRESERVATION PLAN	76,605.04	0.00	0.00	0.00	0
301-541-60-6306	CLAY DRAIN ROAD DESIGN	70,377.00	755,367.00	73,263.00	682,104.00	10

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Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
301-541-60-6307	JACKSON ST IMPROVEMENTS	45,389.72	1,028,500.00	592,148.55	436,351.45	58
301-541-60-6308	HUEY ST IMPROVEMENTS	1,088,856.37	1,629,505.55	1,569,580.04	59,925.51	96
301-541-60-6309	ST CLAIR STREET IMPROVEMENTS	522,957.69	0.00	0.00	0.00	0
301-541-60-6310	DOWNTOWN PARKING GARAGE	6,841,596.54	333,652.59	267,558.74	66,093.85	80
301-541-60-6311	MSC ENTRANCE GATE	33,558.95	0.00	0.00	0.00	0
301-541-60-6312	BROKEN OAK DRIVE	437,327.61	0.00	0.00	0.00	0
541 Total		10,028,236.17	5,366,095.14	2,820,870.81	2,545,224.33	53
301-572-60-6205	RECREATION CENTER AT MLK PARK	156,456.00	224,705.60	1,884.50	222,821.10	1
301-572-60-6302	MILLENNIUM PARK IMPROVEMENTS	227,417.90	13,514,797.00	4,657,080.87	8,857,716.13	34
301-572-60-6304	LAKE DEATON PIER IMPROVEMENTS	419,016.12	0.00	0.00	0.00	0
301-572-60-6305	CITY HALL COURTYARD REHAB	12,588.00	50,000.00	0.00	50,000.00	0
301-572-60-6306	OXFORD PARK IMPROVEMENTS	0.00	500,000.00	35,095.00	464,905.00	7
572 Total		815,478.02	14,289,502.60	4,694,060.37	9,595,442.23	33
301-575-60-6201	COMMUNITY CENTER HVAC UPGRADES	66,745.05	804,000.00	119,439.59	684,560.41	15
301-575-60-6202	COMMUNITY CENTER RENOVATIONS	0.00	100,000.00	5,793.03	94,206.97	6
575 Total		66,745.05	904,000.00	125,232.62	778,767.38	14
301-580-90-9901	CONTINGENCY-CAP.IMPROVEMENT FUND	0.00	48,902.26	0.00	48,902.26	0
301-581-00-4020	TRANSFER TO UTILITY CAP PROJECTS FUND	5,000,000.00	5,000,000.00	5,000,000.00	0.00	100
CAPITAL IMPROVEMENT FUN Expenditure To		16,788,121.60	25,933,500.00	12,653,401.03	13,280,098.97	49
301 CAPITAL IMPROVEMENT FUND		Prior	YTD			
Revenues:		15,874,366.58	10,121,528.29			

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Expenditures:	16,788,121.60	12,653,401.03
Net Income:	913,755.02-	2,531,872.74-

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
401-343-3100	WATER SALES-OPERATING INCOME	4,094,206.34	4,859,723.00	4,250,262.19	609,460.81 -	87
401-343-3150	BULK WATER SALES	0.00	0.00	7.38	7.38	0
401-343-3500	WATER- METER INSTALLATIONS	233,501.32	263,000.00	220,938.10	42,061.90 -	84
401-343-3510	WATER- OTHER (ON/OFF FEES)	35,325.00	30,000.00	38,334.68	8,334.68	128
401-343-3520	WATER INCOME-OTHER	20,439.57	10,000.00	26,139.10	16,139.10	261
401-343-3521	RETURN CHECK BILLINGS	15.00	0.00	15.00	15.00	0
401-343-5100	SEWER OPERATING INCOME-BILLINGS	6,906,353.18	9,614,212.00	7,613,067.70	2,001,144.30 -	79
401-343-5510	SEWER OTHER MISC	0.00	12,000.00	1,152.40	10,847.60 -	10
401-343-5511	LAND LEASE-TURTLE MOUNT(TOWER)	14,180.34	15,000.00	14,547.50	452.50 -	97
401-343-5520	TSS/COD WASTEWATER FEES	906,498.38	1,000,000.00	774,642.16	225,357.84 -	77
401-343-6100	REUSE WATER OPERATIONS	125,915.18	130,295.00	55,161.31	75,133.69 -	42
401-361-0000	INTEREST EARNINGS	93,479.16	25,000.00	59,492.76	34,492.76	238
401-364-0000	GAIN/LOSS OR SALE OF FIXED ASSETS	0.00	0.00	5,001.00	5,001.00	0
401-381-1007	TRANSFER FROM 2013 DEBT REFI CONST FL	854,220.00	0.00	0.00	0.00	0
401-381-1011	TRANSFER FROM WATER SDC FUND	537,114.58	0.00	0.00	0.00	0
401-381-1014	TRANSFER FROM SEWER SDC FUND	2,248,717.40	0.00	0.00	0.00	0
401-389-5000	Non-Operational-Cash Forward- W/S	0.00	10,110,000.00	0.00	10,110,000.00 -	0
UTILITY FUND Revenue Totals		16,069,965.45	26,069,230.00	13,058,761.28	13,010,468.72 -	50

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
401-530-00-0000	PHYSICAL ENVIRONMENT/ADMIN:	0.00	0.00	0.00	0.00	0
401-530-10-1200	SALARIES	123,616.25	194,926.00	140,065.33	54,860.67	72
401-530-10-1500	SICK LEAVE	9,675.56	0.00	6,120.51	6,120.51 -	0
401-530-10-1600	VACATION PAY	11,520.36	0.00	8,992.49	8,992.49 -	0
401-530-10-1800	HOLIDAY PAY	6,282.02	0.00	5,849.46	5,849.46 -	0
401-530-10-2100	FICA EXPENSE	13,775.56	15,111.00	12,292.88	2,818.12	81

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Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
401-530-10-2200	RETIREMENT	24,522.79	26,570.00	22,065.08	4,504.92	83
401-530-10-2210	BENEFIT ADMIN FEES	27.00	0.00	49.50	49.50-	0
401-530-10-2300	LIFE & HEALTH INSURANCE	37,217.56	43,200.00	31,707.83	11,492.17	73
401-530-10-2600	WORKERS COMPENSATION INSURANCE	1,512.62	1,600.00	1,503.44	96.56	94
401-530-30-3100	PROFESSIONAL SERVICES	1,205.00	3,000.00	3,017.50	17.50-	101
401-530-30-3200	ACCOUNTING & AUDITING FEES	22,500.00	35,000.00	25,125.00	9,875.00	72
401-530-30-3400	OTHER CONTRACTUAL SERVICES	31,354.14	35,750.00	30,412.48	5,337.52	85
401-530-30-4000	TRAVEL & PER DIEM	0.00	500.00	0.00	500.00	0
401-530-30-4100	TELEPHONE EXPENSE	5,094.77	5,400.00	4,486.19	913.81	83
401-530-30-4110	IT LICENSING / EQUIPMENT	35,983.74	45,520.00	29,449.35	16,070.65	65
401-530-30-4200	POSTAGE/TRANSPORTATION FEES	31,457.27	32,800.00	21,817.45	10,982.55	67
401-530-30-4300	UTILITIES EXPENSE	17,689.80	20,000.00	14,455.94	5,544.06	72
401-530-30-4400	RENTAL & LEASING	3,806.53	3,750.00	1,144.07	2,605.93	31
401-530-30-4500	GENERAL INSURANCE	316,165.89	450,000.00	364,728.50	85,271.50	81
401-530-30-4600	REPAIR & MAINTENANCE	23,424.12	31,950.00	8,726.18	23,223.82	27
401-530-30-4900	MISC. EXPENSE & OTHER CURRENT	14,718.47	16,200.00	15,218.79	981.21	94
401-530-30-5100	OFFICE SUPPLIES	527.17	1,000.00	237.25	762.75	24
401-530-30-5200	OPERATING SUPPLIES	5,465.63	5,500.00	4,765.30	734.70	87
401-530-30-5400	SUBSCRIPTIONS/DUES	409.86	500.00	37.50	462.50	8
401-530-30-5500	TRAINING	760.00	2,000.00	760.00	1,240.00	38
530 PHYSICAL ENVIRONMENT/ADMIN:		738,712.11	970,277.00	753,028.02	217,248.98	78
401-533-00-0000	WATER DEPARTMENT:	0.00	0.00	0.00	0.00	0
401-533-10-1200	SALARIES	773,366.29	1,275,655.00	769,557.19	506,097.81	60
401-533-10-1250	ON CALL	12,800.00	14,000.00	11,000.00	3,000.00	79
401-533-10-1260	SHIFT DIFFERENTIAL	0.00	5,200.00	0.00	5,200.00	0
401-533-10-1300	OVERTIME	15,771.12	15,000.00	17,660.83	2,660.83-	118

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Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
401-533-10-1500	SICK LEAVE	26,918.54	0.00	25,756.61	25,756.61 -	0
401-533-10-1600	VACATION PAY	37,247.11	0.00	35,023.46	35,023.46 -	0
401-533-10-1700	INCENTIVE PAY	1,250.00	0.00	2,300.00	2,300.00 -	0
401-533-10-1800	HOLIDAY PAY	28,383.61	0.00	28,192.53	28,192.53 -	0
401-533-10-1820	HOLIDAY PREMIUM	1,876.87	5,000.00	12,296.55	7,296.55 -	246
401-533-10-2100	FICA EXPENSE	68,973.85	95,952.00	69,437.33	26,514.67	72
401-533-10-2200	RETIREMENT	262,851.08	189,426.00	124,518.81	64,907.19	66
401-533-10-2210	BENEFIT ADMIN FEES	94.50	0.00	81.00	81.00 -	0
401-533-10-2300	LIFE & HEALTH INSURANCE	148,013.42	249,470.00	139,960.94	109,509.06	56
401-533-10-2600	WORKERS COMPENSATION INSURANCE	24,201.51	25,500.00	23,960.46	1,539.54	94
401-533-30-3100	PROFESSIONAL SERVICES	132,674.52	193,675.66	64,419.49	129,256.17	33
401-533-30-3400	OTHER CONTRACTUAL SERVICES	215,610.16	304,516.00	171,608.47	132,907.53	56
401-533-30-3450	CLOTHING AND UNIFORMS	8,125.98	11,000.00	7,029.53	3,970.47	64
401-533-30-4000	TRAVEL & PER DIEM	4,225.57	8,000.00	7,970.74	29.26	100
401-533-30-4100	TELEPHONE EXPENSE	35,834.80	30,000.00	31,979.69	1,979.69 -	107
401-533-30-4110	IT LICENSING / EQUIPMENT	46,137.96	57,110.00	24,517.81	32,592.19	43
401-533-30-4200	POSTAGE/TRANSPORTATION FEES	975.18	3,500.00	612.97	2,887.03	18
401-533-30-4300	UTILITIES EXPENSE	180,007.68	150,000.00	173,374.66	23,374.66 -	116
401-533-30-4400	RENTAL & LEASING	3,226.26	9,000.00	2,755.19	6,244.81	31
401-533-30-4600	REPAIR & MAINTENANCE	146,646.39	160,000.00	143,638.63	16,361.37	90
401-533-30-4900	MISC. EXPENSE & OTHER CURRENT	4,030.00	6,000.00	102.50	5,897.50	2
401-533-30-4960	BOOT ALLOWANCE	2,671.27	3,850.00	2,045.70	1,804.30	53
401-533-30-5100	OFFICE SUPPLIES	3,794.37	6,500.00	1,435.29	5,064.71	22
401-533-30-5200	OPERATING SUPPLIES	162,974.79	231,000.00	113,962.63	117,037.37	49
401-533-30-5220	WATER METERS	9,455.12 -	449,853.19	218,748.74	231,104.45	49
401-533-30-5250	FUEL EXPENSE	45,671.38	45,000.00	31,031.60	13,968.40	69
401-533-30-5260	CHEMICALS	398,028.60	350,000.00	457,387.97	107,387.97 -	131

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401-533-30-5270	LABORATORY SAMPLES	47,076.00	45,000.00	24,985.00	20,015.00	56
401-533-30-5400	SUBSCRIPTIONS/DUES	7,231.64	9,000.00	6,148.55	2,851.45	68
401-533-30-5500	TRAINING	8,512.18	7,600.00	10,688.85	3,088.85-	141
401-533-60-6300	CAPITAL IMPROVEMENT-OTHER	11,573.85	853,000.00	172,875.55	680,124.45	20
401-533-60-6301	METER CHANGE OUT PROGRAM	115,407.65	220,000.00	93,681.40	126,318.60	43
401-533-60-6350	LOOP/UPGRADE WATER MAINS	222,690.90	1,021,554.60	459,281.17	562,273.43	45
401-533-60-6400	CAP. IMPROVEMENT-MACHINERY	0.00	342,112.00	333,003.24	9,108.76	97
401-533-60-6681	LEASE PURCHASE PRINCIPAL PMT	0.00	19,970.00	19,960.34	9.66	100
401-533-60-6691	LEASE PURCHASE INTEREST PMT	1,702.38	1,640.00	1,638.07	1.93	100
533 WATER DEPARTMENT:		3,197,122.29	6,414,084.45	3,834,629.49	2,579,454.96	60
401-535-00-0000	WASTEWATER DEPARTMENT:	0.00	0.00	0.00	0.00	0
401-535-10-1200	SALARIES	1,114,543.54	1,784,364.00	1,266,486.81	517,877.19	71
401-535-10-1250	ON CALL	18,700.00	19,500.00	17,125.00	2,375.00	88
401-535-10-1260	SHIFT DIFFERENTIAL	0.00	5,200.00	0.00	5,200.00	0
401-535-10-1300	OVERTIME	30,321.50	19,500.00	39,633.05	20,133.05-	203
401-535-10-1500	SICK LEAVE	47,850.49	0.00	47,797.29	47,797.29-	0
401-535-10-1600	VACATION PAY	60,148.99	0.00	63,845.38	63,845.38-	0
401-535-10-1700	INCENTIVE PAY	1,900.00	0.00	4,700.00	4,700.00-	0
401-535-10-1800	HOLIDAY PAY	37,977.19	0.00	45,807.77	45,807.77-	0
401-535-10-1820	HOLIDAY PREMIUM	9,174.30	12,000.00	34,539.60	22,539.60-	288
401-535-10-2100	FICA EXPENSE	101,798.45	130,601.00	116,230.49	14,370.51	89
401-535-10-2200	RETIREMENT	184,571.41	282,391.00	207,404.91	74,986.09	73
401-535-10-2210	BENEFIT ADMIN FEES	310.50	0.00	486.00	486.00-	0
401-535-10-2300	LIFE & HEALTH INSURANCE	190,157.83	320,740.00	221,171.04	99,568.96	69
401-535-10-2500	UNEMPLOYMENT COMPENSATION	0.00	0.00	782.88	782.88-	0
401-535-10-2600	WORKERS COMPENSATION INSURANCE	48,403.12	50,800.00	47,733.00	3,067.00	94

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Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
401-535-30-3100	PROFESSIONAL SERVICES	153,804.49	190,000.00	52,272.52	137,727.48	28
401-535-30-3400	OTHER CONTRACTUAL SERVICES	217,229.14	1,059,000.00	630,896.32	428,103.68	60
401-535-30-3450	CLOTHING AND UNIFORMS	9,168.63	14,000.00	8,951.39	5,048.61	64
401-535-30-4000	TRAVEL & PER DIEM	6,841.37	8,000.00	12,156.80	4,156.80-	152
401-535-30-4100	TELEPHONE EXPENSE	24,270.19	23,000.00	25,005.28	2,005.28-	109
401-535-30-4110	IT LICENSING / EQUIPMENT	40,258.57	55,250.00	23,947.46	31,302.54	43
401-535-30-4200	POSTAGE/TRANSPORTATION FEES	2,613.94	3,000.00	850.19	2,149.81	28
401-535-30-4300	UTILITIES EXPENSE	517,849.79	450,000.00	410,573.34	39,426.66	91
401-535-30-4400	RENTAL & LEASING	33,742.50	75,000.00	26,159.88	48,840.12	35
401-535-30-4600	REPAIR & MAINTENANCE	641,053.33	700,000.00	551,749.33	148,250.67	79
401-535-30-4900	MISC. EXPENSE & OTHER CURRENT	10,881.08	15,000.00	440.36	14,559.64	3
401-535-30-4940	LANDFILL DISPOSAL FEES	166,291.56	180,000.00	137,037.07	42,962.93	76
401-535-30-4960	BOOT ALLOWANCE	1,957.52	5,100.00	2,238.61	2,861.39	44
401-535-30-5100	OFFICE SUPPLIES	4,353.57	5,500.00	5,537.74	37.74-	101
401-535-30-5200	OPERATING SUPPLIES	260,523.82	330,000.00	204,905.76	125,094.24	62
401-535-30-5250	FUEL EXPENSE	71,968.39	65,000.00	75,426.14	10,426.14-	116
401-535-30-5260	CHEMICALS	257,346.12	228,000.00	236,127.33	8,127.33-	104
401-535-30-5270	LABORATORY SAMPLES	160,464.00	300,000.00	240,594.00	59,406.00	80
401-535-30-5400	SUBSCRIPTIONS/DUES	2,675.94	5,000.00	1,696.59	3,303.41	34
401-535-30-5500	TRAINING	8,923.94	10,000.00	7,494.08	2,505.92	75
401-535-60-6200	CAP. IMPROVEMENT-BUILDINGS	0.00	100,000.00	60,726.31	39,273.69	61
401-535-60-6250	LIFT STATION UPGRADES	45,146.91	904,416.42	585,328.07	319,088.35	65
401-535-60-6300	CAPITAL IMPROVEMENT-OTHER	46,594.00	157,000.00	0.00	157,000.00	0
401-535-60-6310	MILLENNIUM PARK PROJECT	0.12	0.00	0.00	0.00	0
401-535-60-6330	CR 209 LS UPGRADES	0.26-	100,583.88	100,583.88	0.00	100
401-535-60-6340	GRAVITY SYSTEM RENEWAL & REPLACEMENT	0.00	230,687.50	161,036.45	69,651.05	70
401-535-60-6400	CAP. IMPROVEMENT-MACHINERY	48,631.33	477,064.43	453,817.80	23,246.63	95

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Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
401-535-60-6610	SEWER SYSTEM RENEWAL AND REPLACEME	71,295.38	645,000.00	407,531.62	237,468.38	63
401-535-60-6681	LEASE PURCHASE PRINCIPAL PMT	0.00	122,000.00	0.00	122,000.00	0
401-535-60-6691	LEASE PURCHASE INTEREST PMT	4,616.50	0.00	0.00	0.00	0
401-535-60-6770	SR 44 FM / CCC DECOMMISSIONING	0.21-	237,141.53	237,141.52	0.01	100
535 WASTEWATER DEPARTMENT:		4,654,358.98	9,319,839.76	6,773,969.06	2,545,870.70	73
401-580-90-0000	CONTINGENCY:	0.00	0.00	0.00	0.00	0
401-580-90-9912	CONTIN- WATER SEWER-REFUSE	0.00	8,680,478.79	0.00	8,680,478.79	0
401-582-00-0000	DEBT SERVICE:	0.00	0.00	0.00	0.00	0
401-582-30-5900	DEPRECIATION	2,768,017.00	0.00	0.00	0.00	0
401-582-30-5920	BAD DEBT EXPENSE	34,150.00	0.00	0.00	0.00	0
401-582-70-7100	SUMTER SCHOOL BOARD LEASE PURCHASE	0.00	170,000.00	170,000.00	0.00	100
401-582-70-7103	DBT SRV.-SRF LOAN PRIN-2007	0.00	355,210.00	355,210.18	0.18-	100
401-582-70-7106	DEBT SERV-2016 CONTINENTAL LOAN (BB&T)	0.00	113,380.00	113,378.97	1.03	100
401-582-70-7204	INT EXP.-SRF LOAN-3 (2007)	31,068.64	24,710.00	24,704.70	5.30	100
401-582-70-7206	DEBT SERV-INTERST-2016 CONTINENTAL (BE	22,659.73	21,240.00	21,236.07	3.93	100
582 DEBT SERVICE:		2,855,895.37	684,540.00	684,529.92	10.08	100
UTILITY FUND Expenditure Totals		11,446,088.75	26,069,220.00	12,046,156.49	14,023,063.51	46

401 UTILITY FUND	Prior	YTD
Revenues:	16,069,965.45	13,058,761.28
Expenditures:	11,446,088.75	12,046,156.49
Net Income:	4,623,876.70	1,012,604.79

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
402-334-3500	STATE GRANT	0.00	9,250,000.00	2,565,475.94	6,684,524.06-	28
402-361-0000	INTEREST	38,836.54	0.00	86,944.57	86,944.57	0
402-382-0010	TRANSFER FROM GENERAL FUND	3,000,000.00	6,000,000.00	6,000,000.00	0.00	100
402-382-3010	TRANSFER FROM CAPITAL IMPROVEMENT FUND	5,000,000.00	5,000,000.00	5,000,000.00	0.00	100
402-382-4090	TRANSFER FROM WW SDC FUND	1,000,000.00	15,000,000.00	10,000,000.00	5,000,000.00-	67
402-389-5000	CASH FORWARD	0.00	8,500,000.00	0.00	8,500,000.00-	0
402-389-9001	LOAN PROCEEDS	0.00	90,000,000.00	0.00	90,000,000.00-	0
402-389-9002	SRF LOAN PROCEEDS	0.00	12,000,000.00	0.00	12,000,000.00-	0
CAPITAL PROJECTS (LOAN/GRANT) Revenue Tot		9,038,836.54	145,750,000.00	23,652,420.51	122,097,579.49-	16

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
402-536-00-0000	CONSTRUCTION FUND:	0.00	0.00	0.00	0.00	0
402-536-60-6913	MILLENNIUM PARK PROJECT	0.00	4,270,000.00	15,285.00	4,254,715.00	0
402-536-70-7353	WWTP PROJECT	0.49-	64,441,700.00	8,819,265.93	55,622,434.07	14
536 CONSTRUCTION FUND:		0.49-	68,711,700.00	8,834,550.93	59,877,149.07	13
402-580-90-9913	CONTINGENCY - CONSTRUCTION FUND	0.00	77,038,300.00	0.00	77,038,300.00	0
402-581-90-9101	TRANSFER TO W/S REVENUE FUND	854,220.00	0.00	0.00	0.00	0
CAPITAL PROJECTS (LOAN/GRANT) Expenditure Tot		854,219.51	145,750,000.00	8,834,550.93	136,915,449.07	6

402 CAPITAL PROJECTS (LOAN/GRANT)	Prior	YTD
Revenues:	9,038,836.54	23,652,420.51
Expenditures:	854,219.51	8,834,550.93

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Net Income:	8,184,617.03	14,817,869.58
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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
403-361-0000	INTEREST EARNINGS	265.69	240.00	117.22	122.78-	49
403-389-5000	NON-OPERATIONAL-CASH FORWARD	0.00	53,600.00	0.00	53,600.00-	0
INDUSTRIAL FUND Revenue Totals		265.69	53,840.00	117.22	53,722.78-	0

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
403-552-00-0000	INDUSTRIAL PARK:	0.00	0.00	0.00	0.00	0
403-552-30-3100	PROFESSIONAL SERVICES	0.00	1,000.00	0.00	1,000.00	0
403-552-30-4980	DEPRECIATION EXPENSE	6,607.00	0.00	0.00	0.00	0
552 INDUSTRIAL PARK:		6,607.00	1,000.00	0.00	1,000.00	0
403-580-90-9999	CONTINGENCY	0.00	42,840.00	0.00	42,840.00	0
403-581-00-0000	INDUSTRIAL PARK:	0.00	0.00	0.00	0.00	0
403-581-00-0100	TRANSFER TO GENERAL FUND	10,000.00	10,000.00	10,000.00	0.00	100
INDUSTRIAL FUND Expenditure Totals		16,607.00	53,840.00	10,000.00	43,840.00	19

403 INDUSTRIAL FUND	Prior	YTD
Revenues:	265.69	117.22
Expenditures:	16,607.00	10,000.00
Net Income:	16,341.31-	9,882.78-

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
404-361-0000	INTEREST	18.29	0.00	6.64	6.64	0
404-389-5002	CASH FORWARD - WATER CONNECTIONS	0.00	51,100.00	0.00	51,100.00-	0
WATER CONNECTION FEES Revenue Totals		18.29	51,100.00	6.64	51,093.36-	0

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
404-533-00-0000	WATER CONNECTION FEES:	0.00	0.00	0.00	0.00	0
404-533-30-4900	MISC. EXPENSE & OTHER CURRENT	360.76	0.00	300.00	300.00-	0
404-580-90-9909	CONTINGENCY - WATER CONNECTION FEES	0.00	51,100.00	0.00	51,100.00	0
404-581-90-9101	TRANSFER TO W/S FUND	231,325.00	0.00	0.00	0.00	0
WATER CONNECTION FEES Expenditure Tota		231,685.76	51,100.00	300.00	50,800.00	1

404 WATER CONNECTION FEES	Prior	YTD
Revenues:	18.29	6.64
Expenditures:	231,685.76	300.00
Net Income:	231,667.47-	293.36-

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
406-361-0000	INTEREST	15.50	0.00	23.11	23.11	0
406-389-5006	CASH FORWARD - WASTEWATER CONNECTION	0.00	154,500.00	0.00	154,500.00-	0
WASTEWATER CONNECTION FEES Revenue		15.50	154,500.00	23.11	154,476.89-	0

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
406-535-00-0000	SEWER TAP CONNECTION FEES:	0.00	0.00	0.00	0.00	0
406-535-30-4900	MISC. EXPENSE & OTHER CURRENT	360.19	0.00	301.24	301.24-	0
406-580-90-5006	CONTINGENCY - WASTEWATER CONNECTION	0.00	154,500.00	0.00	154,500.00	0
WASTEWATER CONNECTION F Expenditure 1		360.19	154,500.00	301.24	154,198.76	0

406 WASTEWATER CONNECTION FEES	Prior	YTD
Revenues:	15.50	23.11
Expenditures:	360.19	301.24
Net Income:	344.69-	278.13-

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
408-343-3560	WATER SDC FEES	1,990,895.22	3,437,000.00	777,261.98	2,659,738.02-	23
408-361-0000	INTEREST EARNED	528.97	200.00	464.15	264.15	232
408-389-5012	CASH FORWARD - WATER SDC	0.00	5,350,000.00	0.00	5,350,000.00-	0
WATER SDC FEES Revenue Totals		1,991,424.19	8,787,200.00	777,726.13	8,009,473.87-	8

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
408-533-30-3401	DEVELOPER REIMBURSEMENTS	0.00	1,070,000.00	1,069,023.04	976.96	100
408-533-30-4900	MISC. EXPENSE & OTHER CURRENT	389.15	0.00	332.65	332.65-	0
408-533-60-6310	OXFORD WTP PHOSPHATE INJECTION	0.00	50,000.00	29,948.00	20,052.00	60
408-533-70-7351	CR 501 IRON FILTRATION PLANT UPGRADES	0.50-	5,564,547.50	1,272,758.34	4,291,789.16	23
533 Total		388.65	6,684,547.50	2,372,062.03	4,312,485.47	35

408-580-90-9914	CONTINGENCY - WATER SDC FUND	0.00	1,846,622.50	0.00	1,846,622.50	0
408-581-90-9101	TRANSFER TO W/S FUND	537,114.58	0.00	0.00	0.00	0
408-582-70-7107	SRF PRINCIPAL - OXFORD WTP	0.00	224,930.00	224,927.97	2.03	100
408-582-70-7207	SRF INTEREST - OXFORD WTP	33,068.02	31,100.00	31,101.63	1.63-	100
582 Total		33,068.02	256,030.00	256,029.60	0.40	100

WATER SDC FEES Expenditure Totals		570,571.25	8,787,200.00	2,628,091.63	6,159,108.37	30
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408 WATER SDC FEES	Prior	YTD
Revenues:	1,991,424.19	777,726.13
Expenditures:	570,571.25	2,628,091.63

CITY OF WILDWOOD
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Net Income:	1,420,852.94	1,850,365.50 -
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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
409-343-5560	WASTEWATER SDC FEES	5,726,336.40	7,150,000.00	2,044,855.65	5,105,144.35-	29
409-361-0000	INTEREST EARNED	1,268.48	500.00	1,035.39	535.39	207
409-389-5013	CASH FORWARD	0.00	12,472,660.00	0.00	12,472,660.00-	0
WASTEWATER SDC FEES Revenue Totals		5,727,604.88	19,623,160.00	2,045,891.04	17,577,268.96-	10

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
409-535-30-3401	DEVELOPER REIMBURSEMENTS	176,523.84	0.00	0.00	0.00	0
409-535-30-4900	MISC. EXPENSE & OTHER CURRENT	397.07	500.00	332.51	167.49	66
409-535-60-6310	MILLENIUUM PARK REUSE LINE	0.00	2,000,000.00	0.00	2,000,000.00	0
409-535-60-6315	HUEY STREET SANITARY SEWER REROUTE	0.01-	0.00	0.00	0.00	0
409-535-70-7346	WWTP FACILITY PLAN	113,504.11	1,666,490.95	1,669,191.77	2,700.82-	100
409-535-70-7355	BRIDGE CROSSING PROJECT	0.22	0.00	0.00	0.00	0
535 Total		290,425.23	3,666,990.95	1,669,524.28	1,997,466.67	46
409-580-90-9915	CONTINGENCY - WASTEWATER SDC FUND	0.00	880,539.05	0.00	880,539.05	0
409-581-00-4020	TRANSFER TO UTILITY CAP PROJECTS FUND	1,000,000.00	15,000,000.00	10,000,000.00	5,000,000.00	67
409-581-90-9101	TRANSFER TO W/S REVENUE FUND	2,017,392.40	0.00	0.00	0.00	0
581 Total		3,017,392.40	15,000,000.00	10,000,000.00	5,000,000.00	67
409-582-70-7101	DBT SERV-SRF CRC09 FORCEMAIN DESIGN F	0.00	4,540.00	4,539.52	0.48	100
409-582-70-7102	DBT SRV-SRF CR209 FM CONSTRUCTION PR	0.00	69,830.00	69,830.18	0.18-	100
409-582-70-7200	INTEREST EXPENSE-CR209 FM SRF CONSTR	309.57	290.00	288.62	1.38	100
409-582-70-7202	INT EXP.-SRF DESIGN LOAN-CR209 FORCEM	1,002.05	970.00	926.70	43.30	96
582 Total		1,311.62	75,630.00	75,585.02	44.98	100
WASTEWATER SDC FEES Expenditure Totals		3,309,129.25	19,623,160.00	11,745,109.30	7,878,050.70	60

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409 WASTEWATER SDC FEES	Prior	YTD
Revenues:	5,727,604.88	2,045,891.04
Expenditures:	3,309,129.25	11,745,109.30
Net Income:	2,418,475.63	9,699,218.26-

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Revenue Account	Description	Prior Yr Rev	Anticipated	YTD Rev	Excess/Deficit	% Real
601-361-0000	INTEREST	137.58	100.00	94.48	5.52-	94
601-389-5000	NON-OPERATIONAL- CASH FORWARD	0.00	51,845.00	0.00	51,845.00-	0
LAW ENFORCEMENT FUND Revenue Totals		137.58	51,945.00	94.48	51,850.52-	0

Expenditure Account	Description	Prior Yr Expd	Budgeted	YTD Expended	Unexpended	% Expd
601-521-00-0000	LAW ENFORCEMENT TRUST:	0.00	0.00	0.00	0.00	0
601-580-90-9999	CONTINGENCY	0.00	51,945.00	0.00	51,945.00	0
LAW ENFORCEMENT FUND Expenditure Tota		0.00	51,945.00	0.00	51,945.00	0

601 LAW ENFORCEMENT FUND	Prior	YTD
Revenues:	137.58	94.48
Expenditures:	0.00	0.00
Net Income:	137.58	94.48

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Grand Totals	Prior	YTD
Revenues:	86,662,982.66	89,115,362.27
Expenditures:	74,358,129.33	85,981,652.49
Net Income:	12,304,853.33	3,133,709.78

CITY COMMISSION
CITY OF WILDWOOD, FLORIDA
REGULAR MEETING
August 11, 2025 9:00 AM
CITY HALL COMMISSION CHAMBER

(meeting taped)

1. Call to Order

Attendee Name	Title	Status
Ed Wolf	Mayor	Present
Pamala Harrison-Bivins	Mayor Pro Tem/Commissioner	Present
Joe Elliott	Commissioner	Present
Marcos Flores	Commissioner	Present
Julian Green	Commissioner	Absent
Jason McHugh	City Manager	Present
Ashley Hunt	City Attorney	Present
Joshua Bills	City Attorney	Present
Cassandra Smith	Assistant City Manager/CFO	Present
Jessica Barnes	City Clerk	Absent
Randall Parmer	Police Chief	Present
Melanie Strickland	Development Services Director	Present
Jeremy Hockenbury	Public Works Director	Present
Paul Ketz	IT Director	Present
Jason Martin	Utilities Deputy Director	Present
Ryan Smith	Utility Billing Supervisor	Present
Thomas Bellegarde	GIS Specialist	Present
Courtney Kellem	Parks & Recreation Director	Present
Steve Watson	Fleet Services Supervisor	Present

Mayor Wolf called the meeting to order at 9 a.m. followed by the invocation and Pledge of Allegiance.

2. Consent Agenda/Informational Items

No items were removed from the Consent Agenda. Items A - F were approved. Motion by Commissioner Bivins, seconded by Commissioner Elliott, to approve the consent agenda as presented. The motion carried unanimously.

RESULT:	Passed
MOVER:	Mayor Pro Tem/Commissioner Harrison-Bivins
SECONDER:	Commissioner Elliott
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

- A. Expenditure Report
- B. Minutes for Approval: July 14, 2025 Regular Meeting
- C. Minutes for Approval: July 21, 2025 Special Meeting
- D. Minutes for Approval: July 28, 2025 Regular Meeting
- E. Minutes for Approval: August 4, 2025 Commission Workshop
- F. A25-2288 VOSO Unit 191 Final Plat

3. Presentations and/or Proclamations

None.

4. Public Hearings - Timed - Legislative

- A. Swear in City Staff and Public Speakers
Mayor Wolf swore in staff and audience members who intended to speak during the public hearings.
- B. A25-1988 - Bonnie Boyd- SSCPA
Development Services Director Strickland presented Ordinance O2025-27, proposing a small-scale Future Land Use Map amendment for the Bonnie Boyd property in the Cole Miller subdivision. The amendment would change the designation from Urban Residential (Sumter County) to Mobile Home Park (City) for approximately 0.146 acres. Strickland noted this was the second and final reading of the ordinance. There were no public comments. Motion by Commissioner Flores, seconded by Commissioner Bivins, to adopt Ordinance O2025-27 on second and final reading. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Flores
SECONDER:	Mayor Pro Tem/Commissioner Harrison-Bivins
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

- C. West Sumter Franchisees Ordinance
City Manager McHugh presented Ordinance O2025-35, granting non-exclusive franchises to West Sumter Utility Company, LLC, and West Sumter Water Conservation Authority, LLC, for the Monarch Ranch property. McHugh explained it would allow the companies to provide water,

sewer, and irrigation utility services in the development area for a 30-year period. He noted the terms were similar to previous franchise agreements with The Villages. There were no public comments. Motion by Commissioner Elliott, seconded by Commissioner Flores, to adopt Ordinance O2025-35 on second and final reading. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Elliott
SECONDER:	Commissioner Flores
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

5. Public Hearings - Timed - Quasi-Judicial

A. A25-1989 - Bonnie Boyd Rezoning

Development Services Director Strickland presented Ordinance O2025-28, proposing a zoning map amendment for the Bonnie Boyd property to change the zoning from R6M (County) to MHP (City) for approximately 0.146 acres. Strickland noted this accompanied the Future Land Use Map amendment just approved. There were no public comments. Motion by Commissioner Bivins, seconded by Commissioner Flores, to adopt Ordinance O2025-28 on second and final reading. Motion carried unanimously.

RESULT:	Passed
MOVER:	Mayor Pro Tem/Commissioner Harrison-Bivins
SECONDER:	Commissioner Flores
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

6. Public Forum - 4 minute time limit

None.

7. Ordinances First Reading Only (No Vote)

A. A25-2689 (AN) South Wildwood Industrial Park West

Development Services Director Strickland presented the ordinance for a voluntary annexation application for parcel F25-261. The property to be annexed totals 27.58 acres MOL and is located north of CR 519A, approximately 0.5 miles east of N US 301. First reading only. No vote.

RESULT:	FIRST READING	PUBLIC HEARING:	August 25, 2025
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B. A25-2723 (AN) 5341 Lexington Cir Annexation

Development Services Director Strickland presented the ordinance for a voluntary annexation application for parcel G16ED003. The property to be annexed totals approximately 0.115 acres of land and is located at 5341 Lexington Circle. First reading only. No vote.

RESULT:	FIRST READING	PUBLIC HEARING:	August 25, 2025
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C. Clay Drain Road Name Change Ordinance

City Manager McHugh presented the ordinance following direction from the City Commission to move forward with the request from the Jacobs Family Trust to rename Clay Drain Road / CR 156 to Mike Jacobs Sr Road. The proposed renaming was reviewed and approved by Sumter County and met all applicable addressing standards and requirements. Upon final adoption by the City Commission, Sumter County would issue the corresponding 911 addressing notifications. First reading only. No vote.

RESULT:	FIRST READING
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PUBLIC HEARING: August 25, 2025
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8. Resolutions for Approval

A. Honorary Road Name Designation Policy

City Manager McHugh presented the resolution. Motion by Commissioner Flores, seconded by Commissioner Elliott, to approve Resolution R2025-24 establishing a policy for honorary road name designations on city-maintained roads. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Flores
SECONDER:	Commissioner Elliott
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

B. IT Surplus Computers & Other Equipment August 2025

IT Director Ketz presented the resolution. Motion by Commissioner Elliott, seconded by Commissioner Bivins, to approve Resolution R2025-25 declaring certain IT equipment as surplus and authorizing disposal. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Elliott
SECONDER:	Mayor Pro Tem/Commissioner Harrison-Bivins
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

9. Financial & Contracts & Agreements

A. Utility Territory Agreement with WSU and WSWCA

City Manager McHugh presented the agreement granting West Sumter Utility (WSU) and West Sumter Water Conservation Authority (WSWCA) the authority to provide potable water, wastewater, and irrigation utility services to certain real property owned by 75 Turnpike BDC, LLC (Monarch Ranch property). Motion by Commissioner Flores, seconded by Commissioner Bivins, to approve the agreement. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Flores
SECONDER:	Mayor Pro Tem/Commissioner Harrison-Bivins
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner

- B. Huey Street Improvements Project Final Payment Application No. 10 in the Amount of \$235,265.14

Public Works Director Hockenbury presented the final pay application for the Huey Street Improvements project. Motion by Commissioner Elliott, seconded by Commissioner Bivins, to approve the final payment. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Elliott
SECONDER:	Mayor Pro Tem/Commissioner Harrison-Bivins
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

- C. Pay Application No. 5 for Phase One of the Water Reclamation Facility Project in the Amount of \$850,738.30

Utilities Deputy Director Martin presented the pay application for phase one of the water reclamation facility project. Motion by Commissioner Flores, seconded by Commissioner Bivins, to approve the payment. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Flores
SECONDER:	Mayor Pro Tem/Commissioner Harrison-Bivins
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

- D. CR 501 Water Treatment Plant High Service Pump No. 3 Repair for the Amount of \$23,972.66

Utilities Deputy Director Martin presented a request to repair a pump at the CR 501 water treatment plant. Motion by Commissioner Bivins, seconded by Commissioner Elliott, to approve the repair. Motion carried unanimously.

RESULT:	Passed
MOVER:	Mayor Pro Tem/Commissioner Harrison-Bivins
SECONDER:	Commissioner Elliott
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

- E. Owner Direct Purchase of Equipment for the R-12 Reclaim Pump Station Project in the Amount of \$769,390.00

Utilities Deputy Director Martin presented a request to purchase equipment for the R-12 Reclaim Pump Station project. Motion by Commissioner Flores, seconded by Commissioner Bivins, to approve the equipment purchase. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Flores
SECONDER:	Mayor Pro Tem/Commissioner Harrison-Bivins
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner

F. Utilization of Regions BillerXchange and Xpress Connect Services

Utility Billing Supervisor Smith presented a request to contract with Regions to utilize the company's BillerXchange and Xpress Connect services. Motion by Commissioner Flores, seconded by Commissioner Bivins, to approve the utilization of the services. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Flores
SECONDER:	Mayor Pro Tem/Commissioner Harrison-Bivins
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

G. Twisted Oaks Pointe CDD - Interlocal for ROW Maintenance

Development Services Director Strickland presented an interlocal agreement requested by Twisted Oaks Pointe CDD for right-of-way maintenance. The proposed agreement gives the District, at its sole cost and expense, the perpetual right and obligation to construct, install, acquire, operate, maintain, repair, and replace all roadway, hardscape, landscape, irrigation, lighting, stormwater, and wetland improvements within the CDD areas. The City would have no obligations whatsoever with respect to the CDD areas or the stormwater inlets. Motion by Commissioner Elliott, seconded by Commissioner Flores, to approve the interlocal agreement. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Elliott
SECONDER:	Commissioner Flores
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

H. Developer's Agreement between the City of Wildwood and Sumter Development Partners, LLC - Summerfield Cottages

Development Services Director Strickland presented a developer's agreement with Sumter Development Partners, LLC, for the development of Summerfield Cottages. Motion by Commissioner Flores, seconded by Commissioner Elliott, to approve the developer's agreement. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Flores
SECONDER:	Commissioner Elliott
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

10. General Items for Consideration/Discussion and Other Business

A. SP 2409-004 Summerfield Cottages

Development Services Director Strickland presented a proposed site plan for the Summerfield

Cottages project, a multifamily residential development consisting of 270 units on parcel C13-024, totaling 49.27 acres MOL. Motion by Commissioner Flores, seconded by Commissioner Bivins, to approve the site plan. Motion carried unanimously.

RESULT:	Passed
MOVER:	Commissioner Flores
SECONDER:	Mayor Pro Tem/Commissioner Harrison-Bivins
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

11. Appointments

None.

12. City Manager Reports

A. Set Budget Workshop for August 18, 2025, at 9:00 am

City Manager McHugh reminded commissioners of the final budget workshop on Monday, August 18, at 9:00 a.m. He also noted upcoming events, including a Target ribbon cutting on August 12 and Wawa grand opening on August 14.

13. Other Department Reports

A. Public Works Quarterly Report

Public Works Director Hockenbury introduced GIS Specialist Bellegarde and turned over the report to him. Bellegarde gave a presentation on the use of GIS in the Public Works department for managing infrastructure assets and supporting decision-making. He demonstrated various GIS applications and maps being used by staff.

B. Parks and Recreation Quarterly Report

Parks and Recreation Director Kellem provided updates on staffing, facility projects, upcoming events, and athletics program participation numbers. She noted increasing registration trends across programs.

C. Fleet Services Department Report

Fleet Services Supervisor Watson reported that all capital equipment vehicles for the year had been received and put into service. He noted two surplus auctions had been held, generating over \$33,000 in revenue.

14. Commission Members Reports

Commissioner Elliott reported on attending recent Sumter County School Board and community events. He commended the city's governance processes that allow residents to voice concerns and have issues addressed by staff.

15. City Attorney Reports

None.

16. Adjournment

With no further business to discuss, the meeting was adjourned at 9:54 a.m.

RESULT:	Passed
MOVER:	Mayor Pro Tem/Commissioner Harrison-Bivins
SECONDER:	Commissioner Flores
AYES:	Mayor Wolf, Mayor Pro Tem/Commissioner Harrison-Bivins, Commissioner Elliott, Commissioner Flores

Upcoming Events

SEAL

CITY COMMISSION
CITY OF WILDWOOD, FLORIDA

ATTEST: _____ BY: _____
Jessica Barnes, City Clerk Ed Wolf, Mayor

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: A25-0583 UF Health Oxford Freestanding Emergency Department

REQUESTED ACTION: The Planning and Zoning Board/Special Magistrate recommends approval.

CONTRACT:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case No	A25-0583 UF Health Oxford FSED
Parcel Number	Portion of Parcel D17-134
Acreage	1.40 Acres, MOL
Property Location	The property is generally located approximately 0.46 miles south of the intersection of US Hwy 301 and CR 466, fronting US Hwy 301
Owner	Preston and Pope, LLC
Applicant	Boldt c/o Faeq Hussain

The applicant is seeking approval from the City of Wildwood City Commission for the construction of a one-story, 14,211 SF medical building (freestanding emergency room) providing for 51 parking spaces including five (5) Florida ADA-accessible parking spaces and two (2) EV charging stations, a generator enclosure, and dumpster enclosure, together with associated infrastructure such as landscaping buffers and site lighting improvements, on 1.40 acres MOL, as per the attached plans.

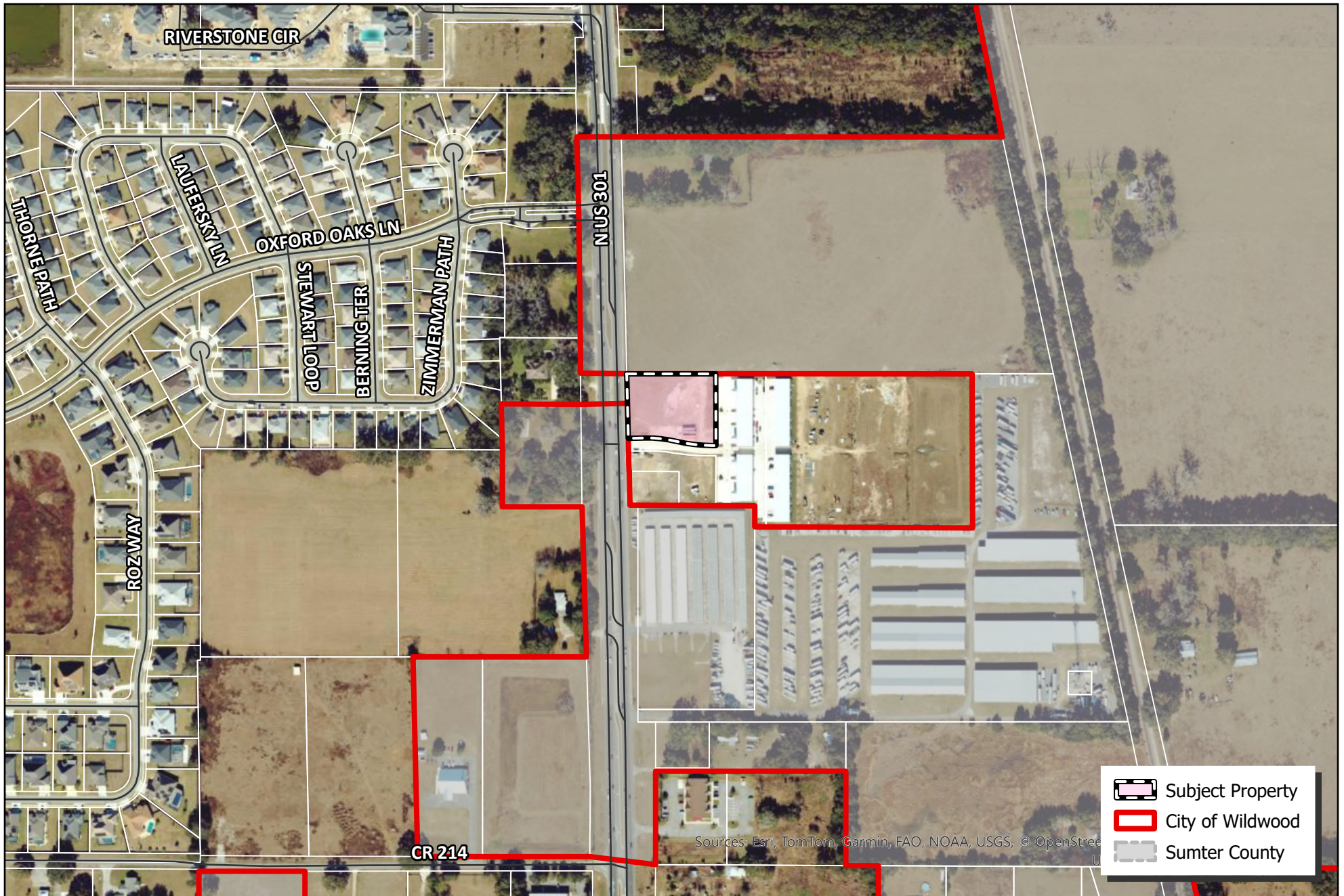
The applicant has been granted a technical waiver to reduce the required parking from 55 parking spaces to 51 spaces since they are able to model parking needs based on other similar establishments operating in surrounding cities. A25-0583 meets the criteria set forth within the Land Development Regulations, the Design District Standards, and is in line with the goals, objectives, and policies within the 2050 Comprehensive Plan.

DATED: 8/19/2025



Wendy Then, AICP, CFM

Assistant Director Development Services



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	N  0.00 0.01 0.03 0.04 0.06 Miles	PJ #A25-0583 UF HEALTH OXFORD FREESTANDING EMERGENCY DEPARTMENT PARCEL D17-134	MAP 1B LOCATION MAP AUG 2025
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RIDDLE
NEWMAN
ENGINEERING INC.
115 NORTH CANAL STREET
LEESBURG, FLORIDA 34748
PHONE (352) 787-7482
FAX (352) 787-7412
keith@riddlenewman.com
C4# 00002983

An aerial photograph of a property, outlined in black. A yellow arrow points to a structure within the property, labeled with the number '66'. The property contains various structures, including a large white building, a smaller white building, and several smaller structures. The surrounding area includes a road, a parking lot, and other buildings.

WATER	CITY OF WILDWOOD
SEWER	CITY OF WILDWOOD
ELECTRIC	DUKE ENERGY
CABLE	SPECTRUM
PHONE	SPECTRUM
REFUSE	CITY OF WILDWOOD

1. BOUNDARY AND TOPOGRAPHICAL INFORMATION SHOWN ARE PER DRAWINGS PREPARED BY CFB SURVEYING, DATED 12/2/24.
2. CONTRACTOR SHALL VERIFY ALL ELEVATIONS PRIOR TO CONSTRUCTION AND BRING ANY DISCREPANCIES TO THE ATTENTION OF THE ENGINEER OR ARCHITECT.
3. CONTRACTOR SHALL LOCATE AND MAINTAIN IN GOOD WORKING ORDER ALL ABOVE GROUND AND BELOW GROUND UTILITIES. CONTRACTOR SHALL COORDINATE THE RELOCATION OR ALTERATION OF EXISTING UTILITIES AS MAY BE REQUIRED. CONTRACTOR SHALL CALL 811 FOR UTILITY LOCATES PRIOR TO DIGGING.
4. ALL ON-SITE CONSTRUCTION SHALL BE IN ACCORDANCE WITH THE CITY OF WILDMOOD, SUMTER COUNTY PUBLIC SERVICES, FLORIDA BUILDING CODE, AND ALL OTHER APPLICABLE CODES.
5. ALL DISTURBED OPEN AREAS SHALL BE SODED OR SEEDED AND MULCHED IMMEDIATELY FOLLOWING COMPLETION OF THE BUILDING CONSTRUCTION AS SHOWN ELSEWHERE IN THESE PLANS. TEMPORARY SEEDING AND MULCHING SHALL FOLLOW IMMEDIATELY FOR AREAS THAT WILL NOT BE WORKED FOR A PERIOD OF SEVEN (7) CALENDAR DAYS OR LONGER.
6. CONTRACTOR SHALL SUPPLY THE ENGINEER WITH "AS-BUILT" CONDITIONS OF ACTUAL CONSTRUCTION.
7. CONSTRUCTION SURVEYING SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR UNLESS OTHERWISE SPECIFIED.
8. CONTRACTOR TO PAY COST OF WET TAPS INTO CITY OF WILDMOOD WATER MAIN.
9. ALL WATER & SEWER LINE CONSTRUCTION SHALL BE DONE IN ACCORDANCE WITH CITY OF WILDMOOD REQUIREMENTS.
10. CONTRACTOR SHALL SCHEDULE A PRE-CONSTRUCTION MEETING WITH THE WILDMOOD UTILITY DEPARTMENT TWO (2) WEEKS PRIOR TO THE START OF CONSTRUCTION AND PRIOR TO ANY MATERIALS BEING DELIVERED ON-SITE.
11. THE CONTRACTOR SHALL OBTAIN A NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM (NPDES) STORMWATER PERMIT AS REGULATED BY THE FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION. THE CONTRACTOR SHALL BECOME FAMILIAR WITH THE NPDES PERMITTING REQUIREMENTS, DEVELOP AND IMPLEMENT A STORMWATER POLLUTION PREVENTION PLAN (SWPPP). THE CONTRACTOR SHALL BE RESPONSIBLE FOR ENSURING THAT THE CONSTRUCTION SITE IS IN COMPLIANCE WITH NPDES REGULATIONS AND WILL BE RESPONSIBLE FOR ANY VIOLATIONS CITED BY DEP DURING CONSTRUCTION. INFORMATION PERTAINING TO THE NPDES PROGRAM IS AVAILABLE ON LINE AT www.state.fl.us/water/stormwater/npdes/section

THAT PART OF THE SOUTHWEST 1/4 OF SECTION 17, TOWNSHIP 19 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, BEING DESCRIBED AS FOLLOWS:

COMMENCE AT THE SOUTHWEST CORNER OF SAID SECTION 17; RUN THENCE N00°04'46"E ALONG THE WEST BOUNDARY OF SAID SECTION 1/4 A DISTANCE OF 15723.8 FEET; THENCE N89°59'22"E A DISTANCE OF 38.88 FEET TO THE EASTERLY RIGHT-OF-WAY LINE OF U.S. HIGHWAY 301 FOR THE POINT OF BEGINNING; THENCE CONTINUE N 89°59'22"E A DISTANCE OF 285.11 FEET TO A POINT ON THE BOUNDARY OF PROPERTY DESCRIBED IN DB, BOOK 3900, PAGE 296, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE ALONG THE BOUNDARY OF SAID PROPERTY WITH THE FOLLOWING COURSES: THENCE S89°59'22"E A DISTANCE OF 116.25 FEET TO AN IRON PEG MARKER LOCATED AT THE INTERSECTION OF THE BOUNDARY OF SAID PROPERTY AND THE BOUNDARY OF SAID SECTION 1/4; THENCE RUN WESTERLY 116.25 FEET ALONG THE ARC THEREOF THROUGH A CENTRAL ANGLE OF 132°40'00" TO THE POINT OF REVERSE CURVATURE OF A CURVE CONCAVE SOUTHERLY AND HAVING A RADIUS OF 40350.0 FEET; THENCE RUN WESTERLY 103.47 FEET ALONG THE ARC THEREOF THROUGH A CENTRAL ANGLE OF 142°40'00" TO THE POINT OF TANGENCY; THENCE S84°40'00" A DISTANCE

REQUESTING WAIVER TO LDR 6.6 (G) TABLE 6-12
TO REDUCE THE REQUIRED MINIMUM NUMBER OF
PARKING SPACES FROM 57 TO 51

12" WATER - CITY OF WILDWOOD
8" ONSITE WATER - PRIVATE
EXISTING LIFT STATION - PRIVATE
2.5" FORCE MAIN - PRIVATE
4" FORCE MAIN IN FDOT ROW - CITY OF WILDWOOD
STORM - PRIVATE
ROADS - PRIVATE
STREET LIGHTS - PRIVATE

TOTAL AREA = 61,055 sq.ft. (1.40 ac.)
PROPOSED IMPERVIOUS AREA = 45,101 sq.ft. (1.04 ac.)
PERCENT IMPERVIOUS AREA = 73.9% (of total area)
MAX ISR = 75%
FLOOD ZONE = "X"
ZONING = "C-3"
FUTURE LAND USE = GENERAL COMMERCIAL
EXISTING USE OF SITE = VACANT
PROPOSED USE OF SITE = MEDICAL
PROPOSED BUILDING SQUARE FOOTAGE = 14,211 sq.ft.
INCLUDING CANOPIES = 15,497 sq.ft.
FLOOR AREA RATIO (FAR) = 0.23
MAX FAR = 0.5
BUILDING HEIGHT = 28'-2"
CONSTRUCTION TYPE: IIB
MINIMUM REQUIRED FIRE FLOW PER FFPC = 2500 GPM
BUILDING SINGLE STORY
PROJECTED NUMBER OF EMPLOYEES = 14 EMPLOYEES
PARKING REQUIRED = 57 spaces (REQUESTING WAIVER TO 51)
PARKING PROVIDED = 51 spaces
HANDICAP SPACES PROVIDED = 5 HC SPACES
SETBACKS: FRONT = 25' / REAR = 15' / SIDE = 15'
BUFFERS: FRONT = 25'
ELEVATIONS BASED ON N.A.S.D. 1988 VERTICAL DATUM

APPLICANT
Philip J. Braun, Registered Agent
The Villages Tri-County Medical
Center, Inc.
d/b/a U/F Health Spanish Plaines
1451 El Camino Real
The Villages, Florida 32159
Phone (352) 373-5924

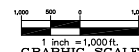
Keith E. Riddle, P.E.
Riddle - Newman Engineering, Inc.
115 North Canal Street
Leesburg, Florida 34748
Phone (352) 787-7482

Kaye M. Jameson
CFB Surveying
4450 NE 83rd Road
Wildwood, Florida 34785
Phone (352) 748-3126

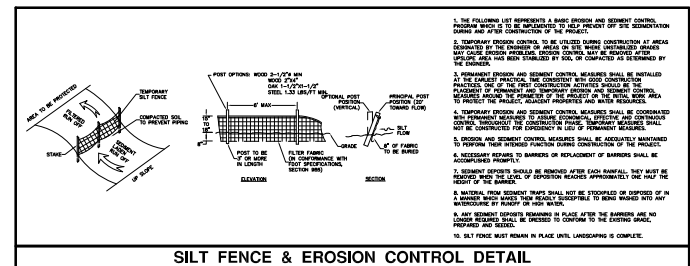
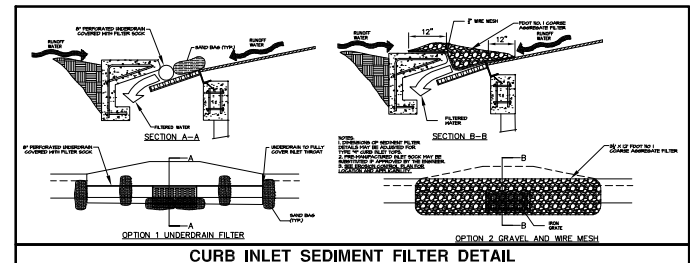
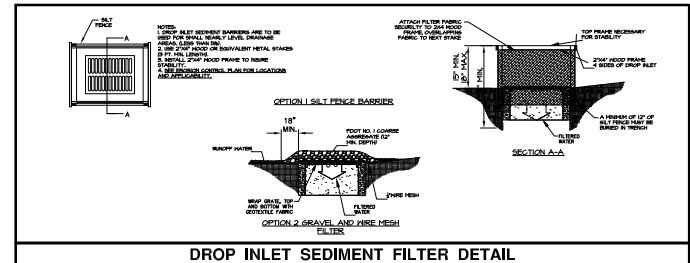
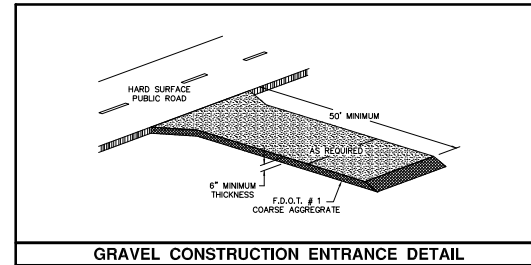
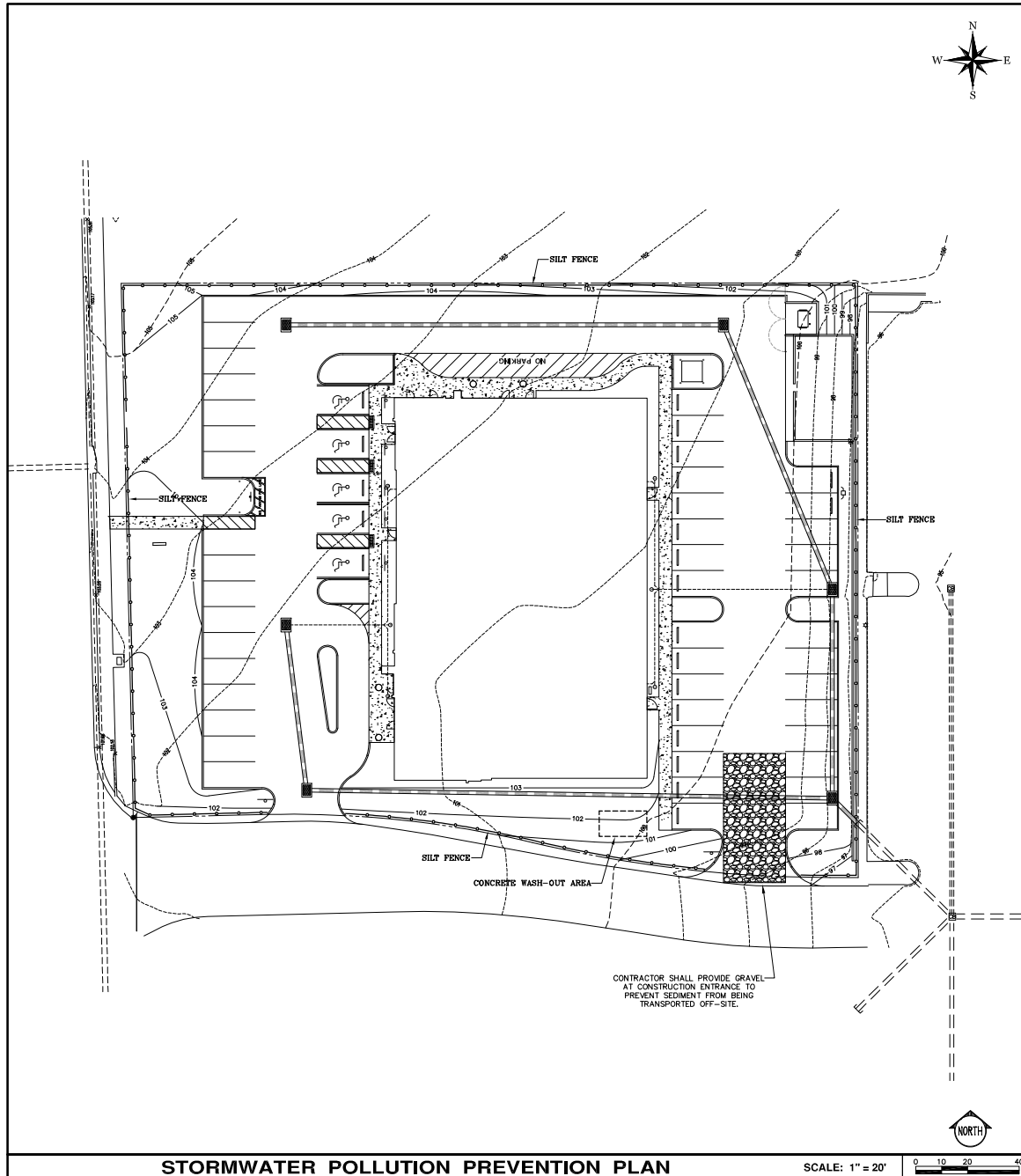
This topographic map shows the area around Oxford and Wildwood. Key features include:

- Topography:** Contour lines indicating elevation, with labels for 100, 110, 120, 130, 140, 150, 160, 170, 180, 190, 200, 210, 220, 230, 240, 250, 260, 270, 280, 290, 300, 310, 320, 330, 340, 350, 360, 370, 380, 390, 400, 410, 420, 430, 440, 450, 460, 470, 480, 490, 500, 510, 520, 530, 540, 550, 560, 570, 580, 590, 600, 610, 620, 630, 640, 650, 660, 670, 680, 690, 700, 710, 720, 730, 740, 750, 760, 770, 780, 790, 800, 810, 820, 830, 840, 850, 860, 870, 880, 890, 900, 910, 920, 930, 940, 950, 960, 970, 980, 990, 1000, 1010, 1020, 1030, 1040, 1050, 1060, 1070, 1080, 1090, 1100, 1110, 1120, 1130, 1140, 1150, 1160, 1170, 1180, 1190, 1200, 1210, 1220, 1230, 1240, 1250, 1260, 1270, 1280, 1290, 1300, 1310, 1320, 1330, 1340, 1350, 1360, 1370, 1380, 1390, 1400, 1410, 1420, 1430, 1440, 1450, 1460, 1470, 1480, 1490, 1500, 1510, 1520, 1530, 1540, 1550, 1560, 1570, 1580, 1590, 1600, 1610, 1620, 1630, 1640, 1650, 1660, 1670, 1680, 1690, 1700, 1710, 1720, 1730, 1740, 1750, 1760, 1770, 1780, 1790, 1800, 1810, 1820, 1830, 1840, 1850, 1860, 1870, 1880, 1890, 1900, 1910, 1920, 1930, 1940, 1950, 1960, 1970, 1980, 1990, 2000, 2010, 2020, 2030, 2040, 2050, 2060, 2070, 2080, 2090, 2100, 2110, 2120, 2130, 2140, 2150, 2160, 2170, 2180, 2190, 2200, 2210, 2220, 2230, 2240, 2250, 2260, 2270, 2280, 2290, 2300, 2310, 2320, 2330, 2340, 2350, 2360, 2370, 2380, 2390, 2400, 2410, 2420, 2430, 2440, 2450, 2460, 2470, 2480, 2490, 2500, 2510, 2520, 2530, 2540, 2550, 2560, 2570, 2580, 2590, 2600, 2610, 2620, 2630, 2640, 2650, 2660, 2670, 2680, 2690, 2700, 2710, 2720, 2730, 2740, 2750, 2760, 2770, 2780, 2790, 2800, 2810, 2820, 2830, 2840, 2850, 2860, 2870, 2880, 2890, 2900, 2910, 2920, 2930, 2940, 2950, 2960, 2970, 2980, 2990, 3000, 3010, 3020, 3030, 3040, 3050, 3060, 3070, 3080, 3090, 3100, 3110, 3120, 3130, 3140, 3150, 3160, 3170, 3180, 3190, 3200, 3210, 3220, 3230, 3240, 3250, 3260, 3270, 3280, 3290, 3300, 3310, 3320, 3330, 3340, 3350, 3360, 3370, 3380, 3390, 3400, 3410, 3420, 3430, 3440, 3450, 3460, 3470, 3480, 3490, 3500, 3510, 3520, 3530, 3540, 3550, 3560, 3570, 3580, 3590, 3600, 3610, 3620, 3630, 3640, 3650, 3660, 3670, 3680, 3690, 3700, 3710, 3720, 3730, 3740, 3750, 3760, 3770, 3780, 3790, 3800, 3810, 3820, 3830, 3840, 3850, 3860, 3870, 3880, 3890, 3900, 3910, 3920, 3930, 3940, 3950, 3960, 3970, 3980, 3990, 4000, 4010, 4020, 4030, 4040, 4050, 4060, 4070, 4080, 4090, 4100, 4110, 4120, 4130, 4140, 4150, 4160, 4170, 4180, 4190, 4200, 4210, 4220, 4230, 4240, 4250, 4260, 4270, 4280, 4290, 4300, 4310, 4320, 4330, 4340, 4350, 4360, 4370, 4380, 4390, 4400, 4410, 4420, 4430, 4440, 4450, 4460, 4470, 4480, 4490, 4500, 4510, 4520, 4530, 4540, 4550, 4560, 4570, 4580, 4590, 4600, 4610, 4620, 4630, 4640, 4650, 4660, 4670, 4680, 4690, 4700, 4710, 4720, 4730, 4740, 4750, 4760, 4770, 4780, 4790, 4800, 4810, 4820, 4830, 4840, 4850, 4860, 4870, 4880, 4890, 4900, 4910, 4920, 4930, 4940, 4950, 4960, 4970, 4980, 4990, 5000, 5010, 5020, 5030, 5040, 5050, 5060, 5070, 5080, 5090, 5100, 5110, 5120, 5130, 5140, 5150, 5160, 5170, 5180, 5190, 5200, 5210, 5220, 5230, 5240, 5250, 5260, 5270, 5280, 5290, 5300, 5310, 5320, 5330, 5340, 5350, 5360, 5370, 5380, 5390, 5400, 5410, 5420, 5430, 5440, 5450, 5460, 5470, 5480, 5490, 5500, 5510, 5520, 5530, 5540, 5550, 5560, 5570, 5580, 5590, 5600, 5610, 5620, 5630, 5640, 5650, 5660, 5670, 5680, 5690, 5700, 5710, 5720, 5730, 5740, 5750, 5760, 5770, 5780, 5790, 5800, 5810, 5820, 5830, 5840, 5850, 5860, 5870, 5880, 5890, 5900, 5910, 5920, 5930, 5940, 5950, 5960, 5970, 5980, 5990, 6000, 6010, 6020, 6030, 6040, 6050, 6060, 6070, 6080, 6090, 6100, 6110, 6120, 6130, 6140, 6150, 6160, 6170, 6180, 6190, 6200, 6210, 6220, 6230, 6240, 6250, 6260, 6270, 6280, 6290, 6300, 6310, 6320, 6330, 6340, 6350, 6360, 6370, 6380, 6390, 6400, 6410, 6420, 6430, 6440, 6450, 6460, 6470, 6480, 6490, 6500, 6510, 6520, 6530, 6540, 6550, 6560, 6570, 6580, 6590, 6600, 6610, 6620, 6630, 6640, 6650, 6660, 6670, 6680, 6690, 6700, 6710, 6720, 6730, 6740, 6750, 6760, 6770, 6780, 6790, 6800, 6810, 6820, 6830,

 LOCATION PLAN
SCALE: 1"=1,000'



C1.1	COVER SHEET
C1.2	STORMWATER POLLUTION PREVENTION PLAN
C2.1	GEOMETRY PLAN
C2.2	CONCRETE PAVEMENT PLAN
C3.1	GRADING & DRAINAGE PLAN
C4.1	UTILITY PLAN
C5.1	DETAILS
C6.1-C6.3	UTILITY DETAILS



- NPDES Requirements**
- The Contractor shall obtain the NPDES permit during the permitting process.
 - The Contractor shall prepare the Storm Water Pollution Prevention Plan (SWPPP). The Contractor may obtain information pertaining to the NPDES program online at www.epa.gov/npdes. The Contractor shall be responsible for maintenance of the site in accordance with the SWPPP. The Contractor will be required to comply with all requirements of the SWPPP and have it posted on-site along with the Erosion Control Plan, the NPDES permit, and the completed Inspection Report Forms. The Contractor shall be responsible for all erosion control practices defined in the SWPPP and associated possibilities for not complying with the NPDES requirements contained in the SWPPP and the NPDES permit. The cost of all compliance related activities shall be included in the bid submitted by the Contractor.
 - The NPDES permit requires at least weekly inspections of the site and inspections within 24 hours following any rainfall event exceeding 0.5 inches. The Contractor is responsible for the weekly inspections and post-rainfall event inspections and these inspections are required to be made by a "Qualified" inspector. These inspections must document compliance with the permit and the SWPPP and the inspector shall complete the Stormwater Pollution Prevention Plan Inspection Report Form. The Contractor can obtain a sample copy of the Inspection Report Form from the Engineer. The Contractor can contact the TDEP at (850) 245-7322 for additional information on qualified inspectors or additional information on the NPDES requirements.
- NPDES REQUIREMENTS**

THIS PLAN HAS BEEN PREPARED IN ACCORDANCE WITH TDEP NPDES STORMWATER POLLUTION PREVENTION PLAN REQUIREMENTS.

CONTRACTOR TO INSTALL DROP INLET SEDIMENT FILTER ON ALL TYPE "T" INLETS.

FILTER FABRIC MUST BE INSTALLED UNDER ALL INLET GRATES, AT ALL TIMES WHEN INLETS ARE NOT PROTECTED BY SILT FENCE OR HAY BALES. UNTIL UNDERCROCK BASE IS FINISHED AND PRIMED.

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PROFESSIONAL ENGINEER
LICENSE NO. 36800

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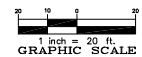
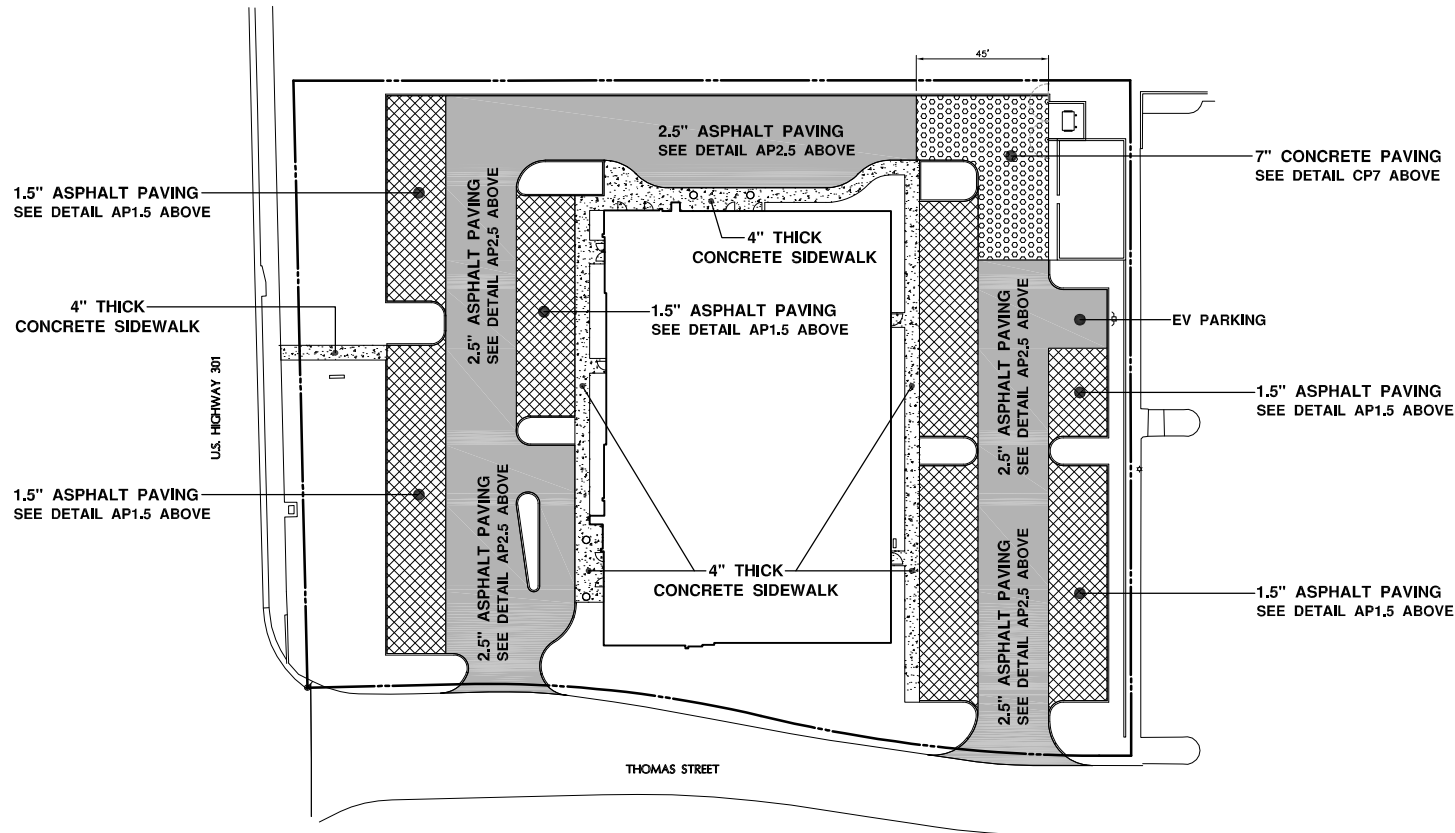
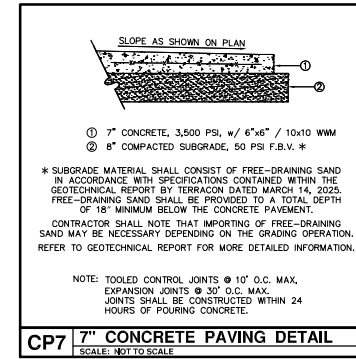
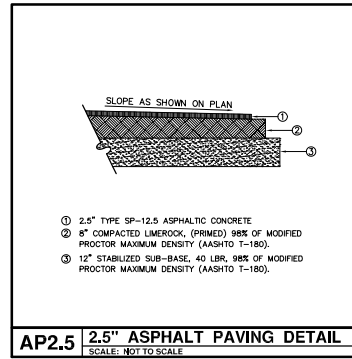
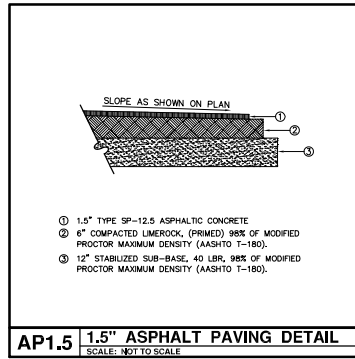
DATE: 2/27/23
PROJECT NO: 2419

STORMWATER POLLUTION PREVENTION PLAN

UF HEALTH OXFORD FSED FLORIDA

WILDWOOD

SHEET NO: C1.2



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CONCRETE PAVEMENT PLAN

UF HEALTH OXFORD FSED
WILDMOOD FLORIDA

SHEET NO. C2.2

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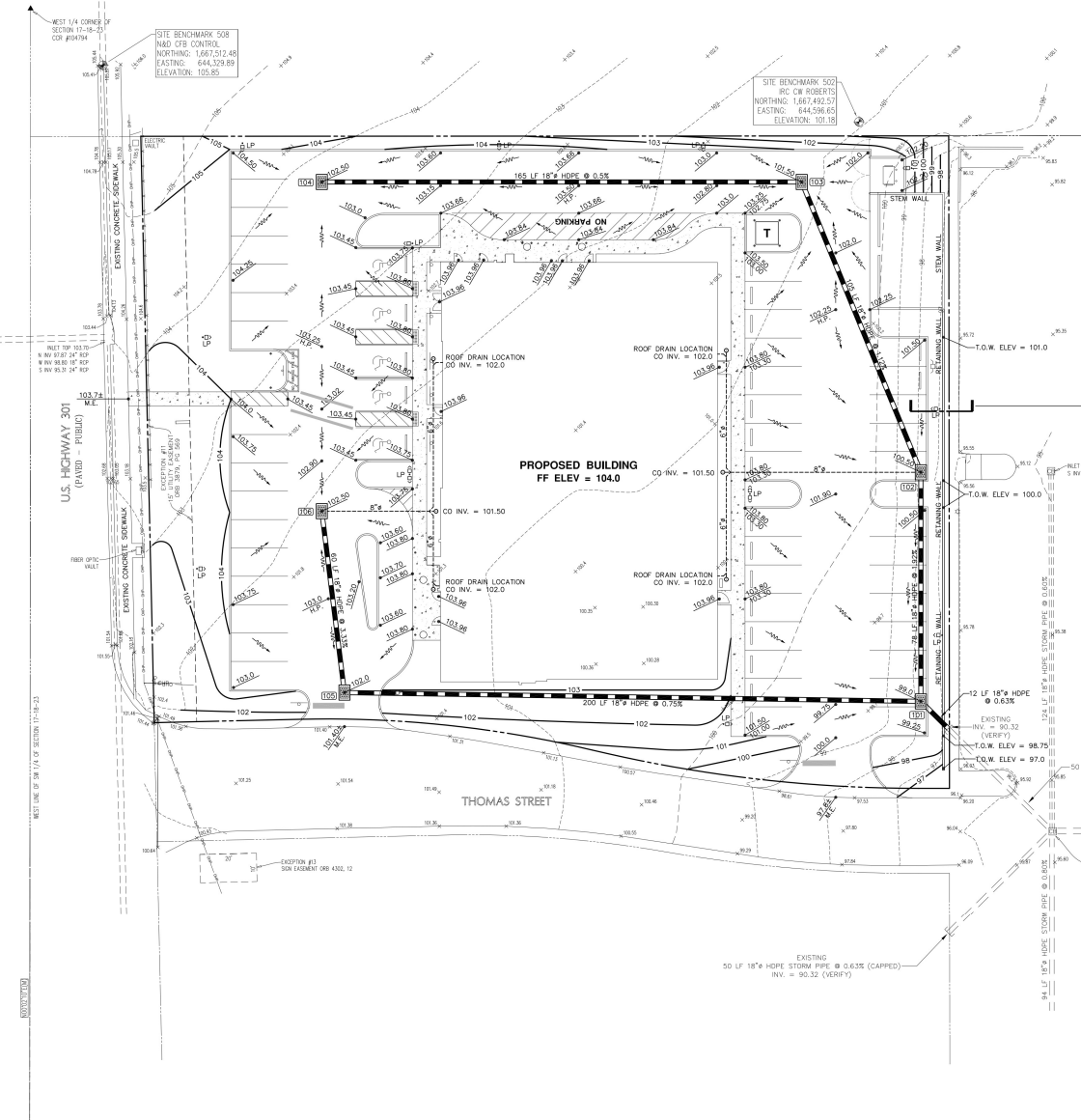
REV #	DATE	DESCRIPTION
1	6/16/25	REVISED PER CITY OF WILDMOOD
2	5/28/25	REVISED FOR WILDMOOD & SHIMADU
3	3/19/25	REVISED FOR COORDINATION

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STATE OF FLORIDA
PROFESSIONAL ENGINEER
LICENSE NO. 36880

DESIGNED BY	DATE
CHECKED BY	DATE
SCALE	DATE
PROJECT NO.	DATE



- LEGEND**
- A/C AIR CONDITIONING UNIT
 - HPDE HIGH-DENSITY POLYETHYLENE
 - LB LICENSED BUSINESS
 - ORB OFFICIAL RECORDS BOOK
 - PG PAGE
 - NAV NORTH AMERICAN VERTICAL DATUM
 - (W) FIELD MEASUREMENT
 - (D) DEED MEASUREMENT
 - DHP OVERHEAD UTILITIES
 - PSM PROFESSIONAL SURVEYOR AND MAPPER
 - R/W RIGHT OF WAY
 - RCP REINFORCED CONCRETE PIPE
 - CO- CONTOUR LINE ELEVATION
 - N&D N&D DISK
 - RC 5/8" IRON ROD AND CAP
 - NOO NO IDENTIFICATION
 - IRIGATION CONTROL VALVE
 - WATER METER
 - BACKFLOW PREVENTOR
 - FIRE HYDRANT
 - WOOD UTILITY POLE
 - GUY ANCHOR
 - LIGHT POLE
 - SIGN
 - ELECTRIC RISER
 - SPOT ELEVATION



RETAINING WALL SECTION
SCALE: NOT TO SCALE

HANDRAIL, AS REQUIRED BY CODE, TO BE INCLUDED WITH WALL DESIGN BY DELEGATED ENGINEER.

RETAINING WALL SHALL BE VERSA-LOK MODULAR CONCRETE BLOCK (OR APPROVED EQUAL) TO BE DESIGNED BY THE WALL MANUFACTURER AND INSTALLED IN ACCORDANCE WITH THE MFG. SPECIFICATIONS. DESIGN OF THE WALL TO ACCOUNT FOR REQUIRED DRAINAGE BEHIND THE WALL.

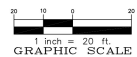
DESIGN OF THE WALL IS DELEGATED TO THE WALL MANUFACTURER AND SIGNED AND SEALED ENGINEERING SHOP DRAWINGS SHALL BE SUBMITTED FOR APPROVAL PRIOR TO INSTALLATION. CONTRACTOR SHALL SUBMIT COLOR SAMPLES AS PART OF THE SHOP DRAWING SUBMITTAL FOR APPROVAL BY THE ARCHITECT/OWNER.

STORM DRAINAGE SCHEDULE			
INLET/MH#	GRATE ELEV.	INV. ELEV.	TYPE
101	99.00	95.50 N&W 90.40 SE	"F"
102	100.50	97.00	"F"
103	101.50	98.18	"F"
104	102.50	99.00	"F"
105	102.00	97.00	"F"
106	102.50	99.00	"F"

STORM SEWER NOTE:
ALL STORM INLETS SHALL BE TYPE "F" PRECAST CONCRETE INLETS WITH HEAVY DUTY GRATE IN ACCORDANCE WITH FDOT INDEX NO. 425-053, U.G.N. ALL STORM PIPING SHALL BE HANCO AASHTO HOPE STORM PIPE OR APPROVED EQUAL. PIPING SHALL CONFORM TO AASHTO M-294 PER FDOT REQUIREMENTS.

VERTICAL DATUM:
ELEVATIONS BASED ON N.A.V.D. 1988 VERTICAL DATUM

ALL GRADING OF THIS SITE SHALL COMPLY WITH THE RECOMMENDATIONS CONTAINED WITHIN THE GEOTECHNICAL REPORT PREPARED BY TERRACON DATED MARCH 14, 2025. CONTRACTOR SHALL OBTAIN A COPY OF THIS REPORT AND SHALL BE RESPONSIBLE FOR GRADING AND EARTHWORK WORK ALL IN COMPLIANCE WITH THE RECOMMENDATIONS IN THE REPORT.



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RIDDLE - NEWMAN ENGINEERING, INC.

KEY: E. RIDDLE, P.E.
STATE OF FLORIDA
PROFESSIONAL ENGINEER
LICENSE NO. 38860

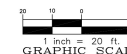
DATE: 2/27/25
SCALE: 1"=20'
SHEET NO. 2419

PROJECT NO. 2419

GRADING & DRAINAGE PLAN

UF HEALTH OXFORD FSED
FLORIDA

C3.1



STORM SEWER NOTE:

ALL STORM INLETS SHALL BE TYPE "F" PRECAST CONCRETE INLETS WITH HEAVY DUTY GRATE IN ACCORDANCE WITH FDOT INDEX NO. 425-053, U.O.N.

ALL STORM PIPING SHALL BE HANCOR AASHTO HOPKINS STORM PIPE OR APPROVED EQUAL. PIPING SHALL CONFORM TO AASHTO M-294 PER FDOT REQUIREMENT.

VERTICAL DATUM:
ELEVATIONS BASED ON N.A.V.D. 1988 VERTICAL DATUM.

PVC PIPING SPECIFICATIONS
DOMESTIC WATER LINES SHALL BE C-900 PVC, DR18, CLASS 235.
FIRE LINES SHALL BE C-900 PVC, DR14, CLASS 305.

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STATE OF FLORIDA,
PROFESSIONAL ENGINEER
LICENSE NO. 38800

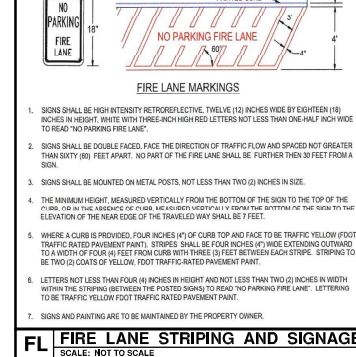
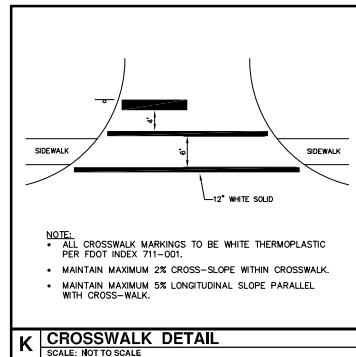
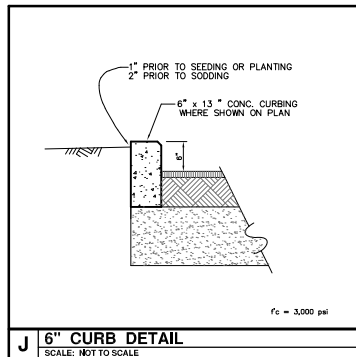
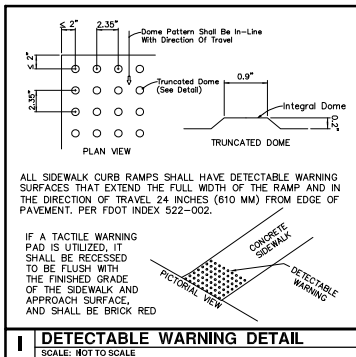
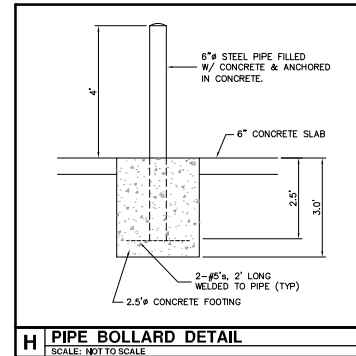
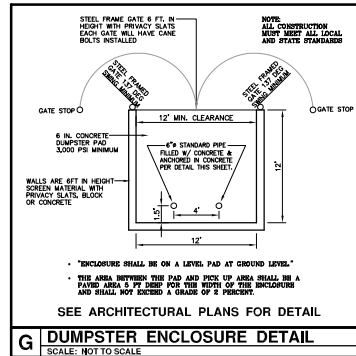
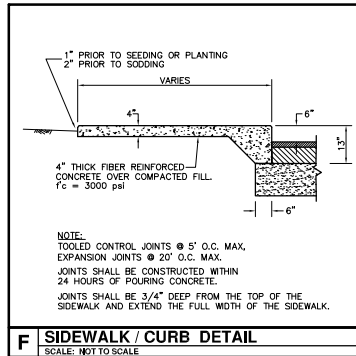
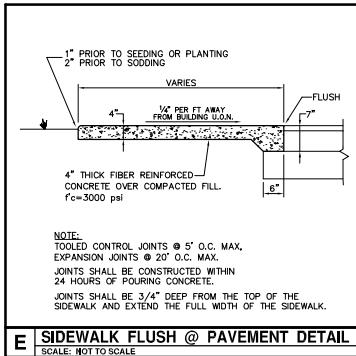
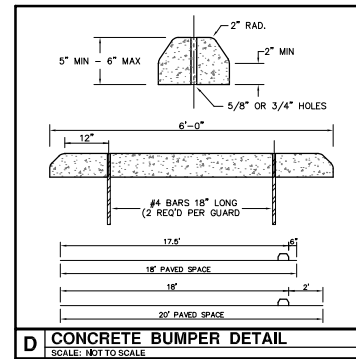
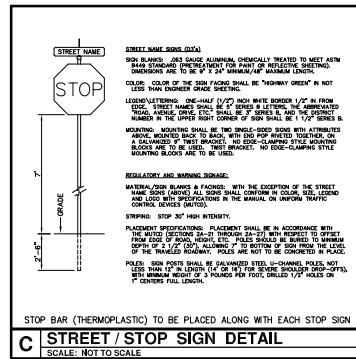
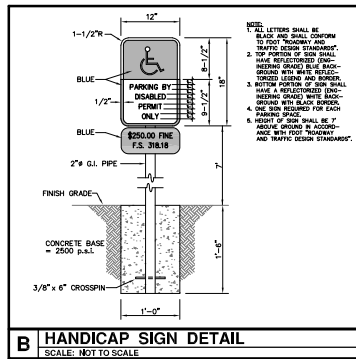
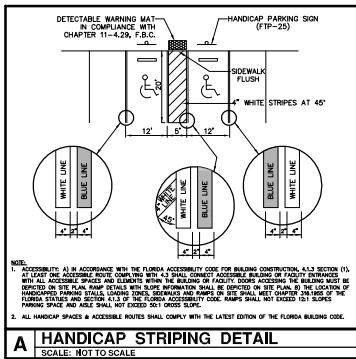
NAME: R.S.H.
UNIT: K.E.R.
DATE: 1"=20'
TIME: 2/27/25
BY: J.A.H.

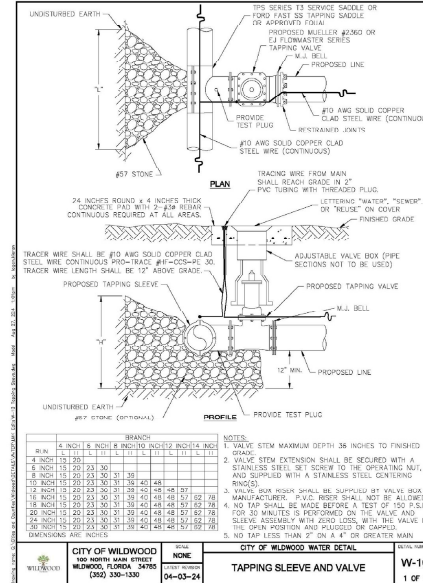
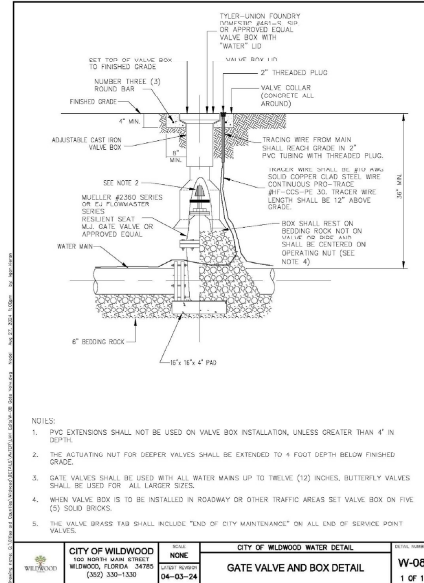
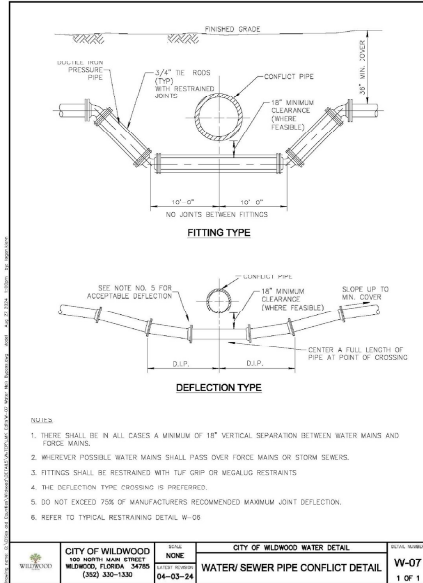
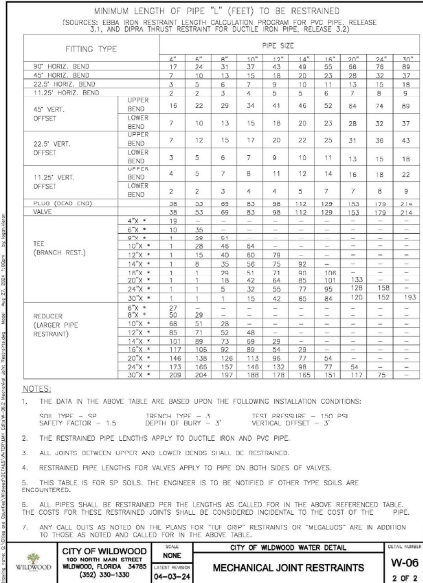
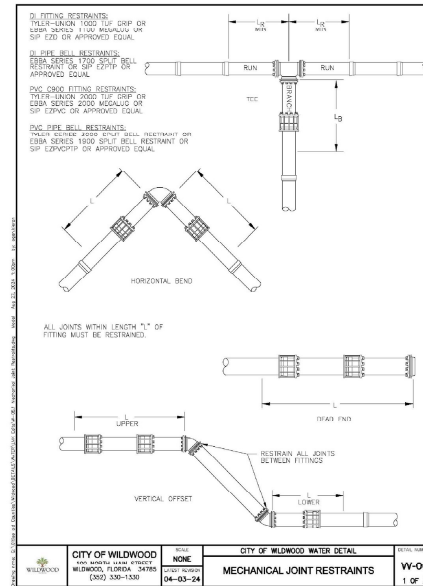
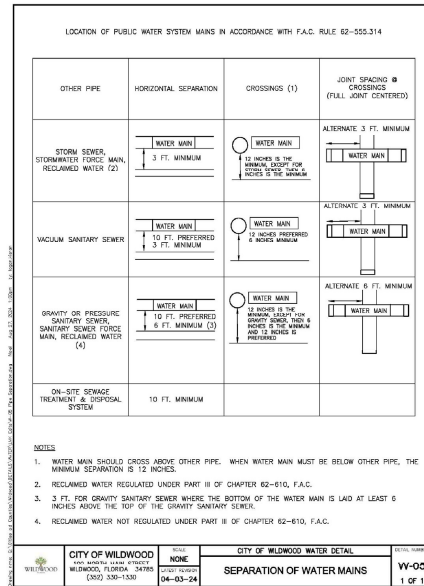
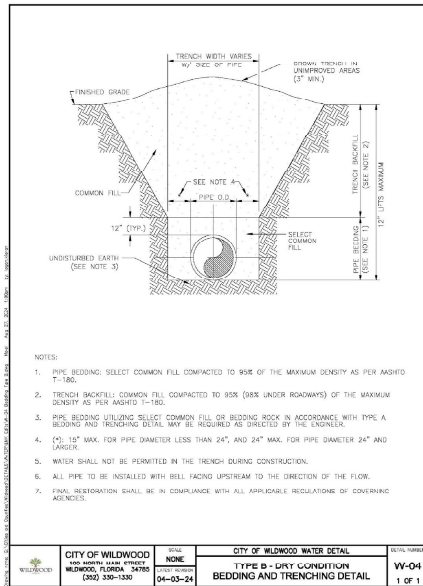
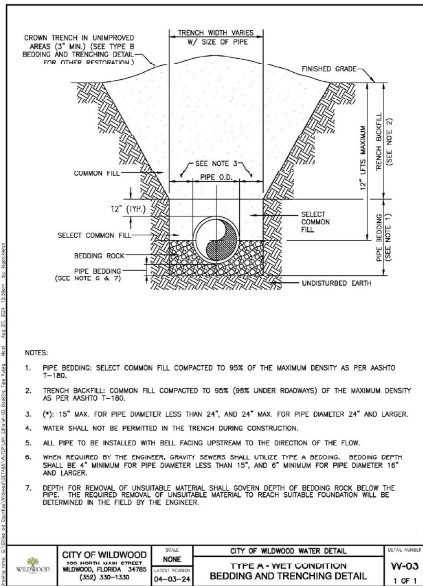
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UTILITY PLAN

UF HEALTH OXFORD FSED
WILLOW
FLORIDA

SHEET NO.
C4.1





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RIDDLE
 NEWMAN
 ENGINEERING INC.

KEITH E. RIDDLE, P.E.
 STATE OF FLORIDA
 PROFESSIONAL ENGINEER
 LICENSE NO. 38860

TYPICAL WATER DETAILS

UF HEALTH OXFORD FSED
 WILDWOOD

R.S.H.
 C.K.R.
 N.T.S.
 DATE: 2/27/20
 PROJECT NO: 2419

SHEET NO.

C6.2

INSTALLATION AND MAINTENANCE NOTES

- The work consists of the complete plant material installation as shown on the drawings and as herein specified. This work shall include, but is not limited to, the supplying of all plant material specified, the furnishing of all labor, equipment, appliances and materials called for, and in performing all operations in connection with the landscape specifications as shown on this plan. Further, the work shall include the maintaining of all plants and planting areas until phase acceptance by the owner, and fulfilling of all guarantee provisions as herein specified.
- Adjustments to planter beds as shown on plans may be necessary due to walk locations, bearing, relationship to roadways, etc. Plant material may need to be added or subtracted in the field. The contractor shall be responsible for the final plant count upon completion of the job. The final plant count will be submitted to the owner prior to final payment.
- The contractor shall fully acquaint themselves with the related site grading, water supply, electrical supply, and other utilities to preclude any misunderstanding and facilitate a trouble free installation.
- No substitution shall be made without written permission of the owner.
- In the event of a variation between the plant list and the number of plants shown on the plans, contact the Project Landscape Architect immediately.
- Plant materials will be inspected at the job site by the owner. When inspected work does not comply with the specified requirements, the contractor shall replace rejected work and continue specified maintenance until the work is re-inspected and found acceptable and remove rejected plants and materials from the job site within 48 hours.
- All materials shall be installed in a neat and workmanlike manner. The owner or his landscape architect reserves the right to direct the removal and replacement of any items which, in his opinion, do not present an orderly and reasonably neat or workmanlike appearance, provided such items can be installed in an orderly way by the usual method of such work.
- All plant material shall be Florida No. 1 grade or better as defined in "Grades and Standards for Nursery Plants", as published by the Florida Department of Agriculture and Consumer Services, most current edition.
- All planting beds shall be mulched with 3" of pine bark nuggets, 100% organic, of the highest grade.
- All trees 6" or larger shall be staked or guyed. Staking materials and methods shall be submitted to the Owner for approval prior to installation.
- Planting soil shall consist of the existing soil amended if required.
- Fertilizer shall be quick release, water soluble and shall conform to the applicable state of Florida and City of Wildwood fertilizer laws. The contractor shall submit to the owner or landscape architect a fertilization certification.
- All plants shall be watered thoroughly when planted.
- Sod shall be well matted with grass roots. The sod shall be taken up in rectangles preferably 12" by 24", a minimum of 2" in thickness, and shall be reasonably free of weeds and other grasses and shall have a soil mat of sufficient thickness adhering firmly to the roots to withstand all necessary handling. The sod shall be shaded and kept moist until it is planted. Damaged sod will be rejected. Replanting shall be done within 48 hours after time of harvesting or kept damp until planted.
- Sodding schedule:
 - All lawn areas shall be planted with a species specified by the Owner (limits determined by Owner).
 - Soft spots and inequalities in grade shall be corrected before starting work.
 - Lay sod without voids. Thoroughly water after planting. The surface shall be true to finish grade lines and even and firm all plants.
 - Place sod with staggered joints closely butted, tamped or rolled to an even surface. Erosion control measures are mandatory in swales, ripples or ways, or any other areas subject to erosion.
- All shrub areas and areas to be sodded will be automatically irrigated. Verify areas to be irrigated with owner prior to commencing work.
- Contractor shall clean up and remove from the premises all surplus materials and rubbish.
- All shrubs and sod shall be guaranteed for one hundred eighty (180) days after final acceptance of the final phase by owner. All trees shall be guaranteed for one (1) year after final acceptance of the final phase.
- Protective barkades shall be placed around all protected trees to be saved and shall remain in place until construction is complete. Barkades shall be constructed as detailed.
- Final Inspection will not take place until all materials have been planted/installed properly.
- Contractor will be notified by letter of the final acceptance of each phase within ten (10) days after final phase inspection or ten (10) days after retro-spection should that be necessary.
- Upon final notice of final acceptance of each phase, the owner will assume maintenance.
- If trees are wrapped in burlap and wire, remove wire and burlap from the surface of the root ball.

Landscape Notes:

All plant material to be Florida #1 or better as defined in the Florida Grades and Standards for Nursery Plants, most current edition.

Required canopy trees shall have a single straight trunk to a minimum of four feet (4'), and a minimum DBH of two inches (2"), and be a minimum of eight feet (8') tall at the time of planting.

Required ornamental trees may be single stemmed or multi-stemmed, a minimum DBH of two inches (2"), and be a minimum of eight feet (8') tall at the time of planting.

Required shrubs and hedges shall have a container size of 3 gallon minimum, have a minimum height of 30 inches (30") at the time of planting and shall reach an average height of three feet (3') within 1 year of planting. When a continuous hedge is required, the plants shall be planted at a maximum spacing of thirty inches (30") on center.

Landscape plants and features that are not required by code shall be optional to install at owner's discretion without plan revision.

All Landscape trees to be from preferred tree list or approved alternatives.

All landscape shrubs to be from preferred shrub list or approved alternatives.

Installation of trees and shrubs shall comply with standard nursery practice.

Landscape to meet all applicable Florida Friendly and City requirements.

Required landscape buffers to utilize existing plant material where applicable.

All landscape planting in the WRAs will be above the designated high water elevation.

See engineering plans for details and dimensions.

Ground cover hatch patterns illustrate differences in mass planted areas, hatch pattern is not associated with any particular ground cover type.

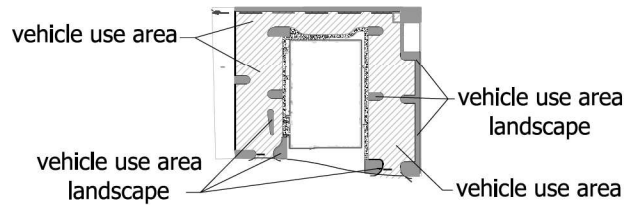
Minor changes to tree locations are possible to avoid conflict with Photometric plan.

All landscaped areas will be 100% irrigated by an automatic system.

Trees with invasive root systems will maintain a 12' setback from utilities.

All foundation plantings to be a minimum of 3' from building walls.

No protected trees to be removed.

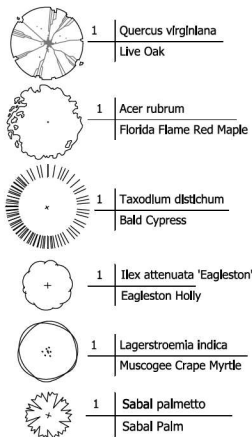


Vehicle Use Area Diagram

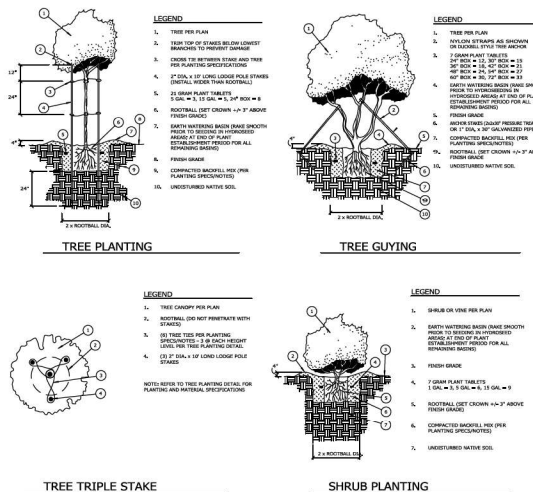
Landscape Area Within Vehicle Use Areas:

Vehicle use area: 26,816 sf. Landscape area required (10%) = 2,681 sf.
Landscape area provided (15.5%) = 5,490 sf (see diagram)

Tree Symbol Legend:

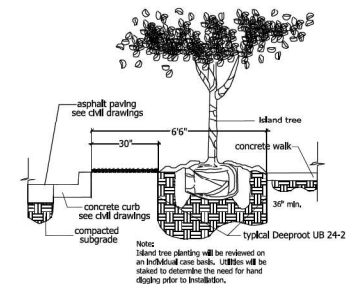
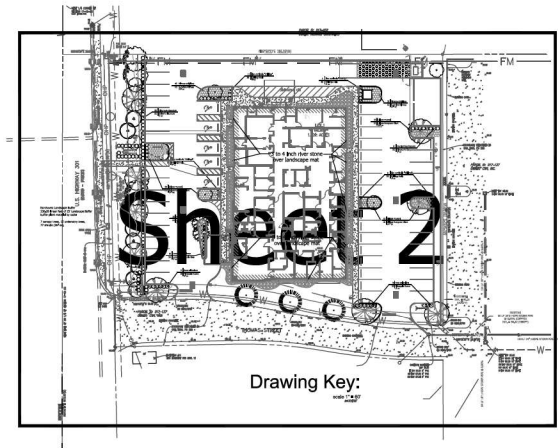


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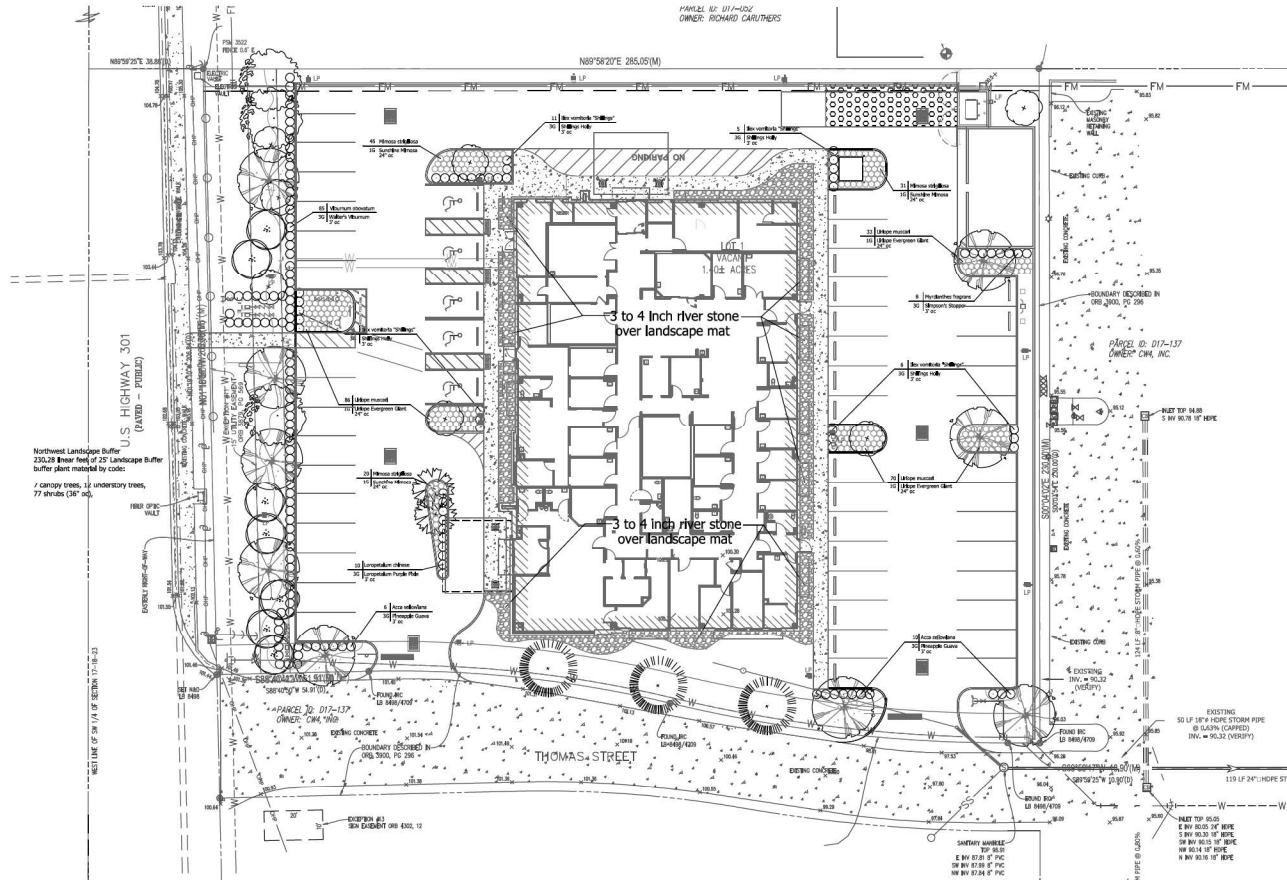


Plant List:

Quantity	Common Name	Scientific Name	Soil Moisture Range	Native	Spacing	Notes
TREES						
9	Southern Live Oak	<i>Quercus virginiana</i>	L, M	Yes	as shown	2" DBH, 8'x4'
3	Bald Cypress	<i>Taxodium distichum</i>	L, M	Yes	as shown	2" DBH, 8'x4'
2	Cabbage palm, sabal palm, cabbage palmetto	<i>Sabal palmetto</i>	L, M	Yes	as shown	re-generated head, sick trunk
3	Florida Flame Red Maple	<i>Acer rubrum</i>	L, M	Yes	as shown	2" DBH, 8'x4'
6	Muscogee Crape myrtle	<i>Lagerstroemia indica 'Muscogee'</i>	L, M	No	as shown	2" DBH, 8'x4'
7	Eagleston Holly	<i>Ilex attenuata 'Eagleston'</i>	L, M	Yes	as shown	2" DBH, 8'x4'
SHRUBS						
10	Loropetalum Purple Pixie	<i>Loropetalum chinense 'Purple Pixie'</i>	L, M	No	3' oc	3G, 30"
16	Pineapple Guava	<i>Acca sellowiana</i>	L, M	No	3' oc	3G, 30"
30	Shillings Holly	<i>Ilex vomitoria 'Shillings Dwarf'</i>	L, M	Yes	3' oc	3G, 30"
8	Simonstopper, Twiberry	<i>Myrsine fragrans</i>	L, M	Yes	3' oc	3G, 30"
53	Walter's viburnum	<i>Viburnum coccineum</i>	L, M, H	Yes	3' oc	3G, 30"
GROUND COVER						
189	Liriope Evergreen Giant	<i>Liriope muscari 'Evergreen Giant'</i>	L	No	24" oc	1G
56	Sunshine Mimosa	<i>Mimosa stipulacea</i>	M	Yes	24" oc	1G
SOD						
9284 sf	Argentine Bahia	<i>Paspalum notatum</i>	L, M	No		sod



Island Tree Planting With Root Barrier Detail
not to scale



Scale: 1"=20'

scale: 1"=20'
sheet: L2
of: 2

revision:	date:	by:	check:
1	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
2	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
3	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
4	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
5	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
6	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
7	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
8	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
9	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
10	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
11	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
12	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
13	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
14	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
15	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
16	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
17	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
18	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
19	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER
20	05/25/2023	W. HUFFSTETLER	W. HUFFSTETLER



UF Health Oxford
Wildwood, Florida

Landscape Plan



L.R. HUFFSTETLER, INC.
Landscape Architecture & Planning
36655 Lake Yale Drive
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IRRIGATION DESIGN NOTES

A. GENERAL NOTES

1. The plans and drawings are diagrams of the work to be performed. The work shall be executed in a manner to avoid conflicts with utilities and other elements of construction, including landscape materials. Any and all deviations shall be brought to the attention of the owner or owner's representative. The contractor shall not willfully install any aspect of the irrigation system as shown on the plans and drawings when it is obvious in the field that circumstances, grade differential, or other conditions exist that might not have been known during the design of the irrigation system. In the event that notification of the conflict is not given to the representative, the contractor will assume full responsibility for all revisions.

2. Irrigation system shall be installed in accordance with the plans, Irrigation System Specifications and all contract documents. Contractor shall comply with all prevailing local codes, ordinances and regulations.

3. Check and verify all site conditions, including service utility locations, prior to trenching or digging. Coordinate all irrigation system construction with existing and/or new plantings to avoid conflict or interference with landscape piling, seeding, cables and service utilities. The irrigation contractor is responsible for coordinating installation with all other construction on the especially landscape installation. Irrigation system is to be relocated for no additional cost for any conflict with landscape installation or any other site construction or existing conditions. All components that are not contained within the specific areas shown on the drawings will not be accepted. All piling and other components are to remain within the property of the OWNER.

4. Where existing or new trees, light standards, signs, electronic controllers and/or other objects are on obstruction to an Irrigation sprinkler's pattern, the component and piping shall be relocated as necessary to obtain proper coverage without damaging the obstruction. The Landscape Architect or representative is to determine if obstruction occurs or not.

5. Component spacing is maximum. Do not exceed spacing shown or noted on the plans. Component spacing should be adjusted to accommodate changes in terrain and piling layout as long as the modified spacing does not exceed the spacing shown in the plans. Unless shown otherwise, Irrigation contractor shall provide 100% coverage.

6. All materials and equipment shown shall be installed as detailed on the plans. If the drawing do not thoroughly describe the techniques to be used, the installer shall follow the installation methods/instructions recommended by their manufacturer.

7. Irrigation contractor shall adjust all sprinklers, controller and other operating characteristics, including coverage, operating pressure, flow rates and operating time, as indicated on the drawings and on the Irrigation system specifications. Adjust all sprinklers to avoid overwater of water onto buildings, roadways, sidewalks or existing native vegetation.

8. Contractor to provide installation shop drawings and manufacturer product information for all Irrigation components. All installation shall be as recommended by manufacturers. The quantities shown in the legends and symbol sheets shall not be used for bidding purposes. The contractor will be responsible for conducting a comprehensive takeoff of materials to determine the actual quantities of materials necessary to execute the work described on the plans and drawings.

9. All trenches shall be backfilled with clean, debris-free materials. Clean sand shall be used for bedding materials to prevent soil settlement adequately fill of rock and other extraneous debris. Pulling pipe may be utilized where applicable.

10. All solvent welding shall be preceded by priming of the fittings and pipe as recommended by the manufacturer.

11. Contractor and label number all zone valve covers with corresponding controller zone number and location valve box with record drawing numbers.

B. MAINLINE & PIPING

1. All Irrigation main(s) & sub main(s) and lateral piping shall be CLASS 200 PVC Purple Pantone (Reclaimed) pipe with blue fittings. All

2. The depth of all lines shall be 18" minimum cover for mainline and 12" minimum cover for lateral lines as specified per plans and details. Measurements shall be from top of pipe(s) to finish grade. Contractor will be responsible for re-trenching and relaying any piping not meeting specified depths.

C. SLEEVING

1. All sleeves SCH-40 PVC size as per plan. All sleeves to be twice the diameter of piping to be installed.

2. Irrigation contractor shall coordinate with general contractor for the location of sleeving crossings whether shown or not. At no time shall sleeving share the same bore with main(s) or other piping unless sleeving is installed in conduit inside of sleeve for protection.

3. All sleeving shall extend 12" beyond the edge of the surface requiring sleeving.

4. All sleeving sleeves shall be SCH-40 (1") or as sized per plan.

D. ISOLATION VALVES

Not applicable on this project

E. QUICK COUPLER VALVES

Not applicable on this project

F. CONTROL SYSTEM Weathermatic SL-1600 Rain-Sensor

SL1600 CONTROLLER(S) shall be model SL1600 as manufactured by Weathermatic Sprinkler Division of Telco Industries, or approved equal. Controller(s) shall be modular.

OPERATION: Controller shall be capable of standard time wetting or auto adjust wetting times when equipped with an optional SLV weather monitor manufactured by Weathermatic. Auto Adjust wetting shall be based on real time, on-site weather data and system audit data entered by the user. Auto adjust timing shall be based on the Hargreaves ET calculation formula. Controller shall provide reversible wetting cycles, scheduled run times by zone and a total run time relay for each zone which is resettable by the user. A more or less function shall be provided to allow run time adjustment by timer for shade/sunlight, system efficiency and other local factors. Auto adjust mode shall also include automatic calculation of run/times based on both soil type and zone elevation.

Each program shall have eight independent start times, calendar schedules, watering budgets by month and a soak/soak for wetting and penetration rates.

Controller shall have a pump start/stop valve position which will be programmable to operate on demand from any selected zone. A programmable safety delay shall be included for zone to zone delay and master valve to zone delay for operating duration.

Controller shall have input for rain and freeze sensor devices. Use of the optional SLV weather monitor shall incorporate the rain and freeze shutdown functions and shall incorporate a 48 hour delay after closure of the rain sensor switch.

Controller shall have self-diagnostic capabilities to detect "short" or "open" zones and the ability to display lists of faults on an LCD display for the user. Diagnostics shall include LCD display of volt/amp readings by zone and for transformer output as well as backup battery readings. A chatter function shall also be provided to assist in locating buried valves. The controller shall automatically prevent master valve opening or pump start when the valve locator diagnostic is used.

Display shall be backlit for clear viewing in all lighting conditions. Zone timing shall be settable from 1 minute to 9 hours and 55 minutes.

Program 0 shall operate concurrently with programs A, B, and C. Programs A, B and C shall check in sequence of start time operation.

Program schedules shall include options for days of the week, odd date, even date and an interval of 1 to 30 days. A 'no water' window shall be available to inhibit daily operations of a program or between two selected times on a given day or on a specified calendar date or specific days of the week. Adjustments for leap year shall be automatic.

Manual operation shall be provided by program, by station, or on a programmable test program with durations from ten (10) seconds to ten (10) minutes. The programmable test program shall also check for short and open conditions on each zone each time it is run.

Non-volatile memory shall retain all programming and real-time clock shall be provided to maintain date and time.

CONSTRUCTION: Controller shall be enclosed in a U.L., C.E. and C-Mark Listed nitrile-proof plastic enclosure with optional key lock. The enclosure shall be rated for outdoor or indoor use. Enclosure shall be a wall mount (pendant mount) model with removable knockouts on the lower side and back of the housing for choice of wiring location. The operating panel shall be a totally enclosed knockout that is removable from the housing for programming at a separate location. A test post for 24V a.c. operation shall be accessible with or without the operating panel. Zone modules (SLM) shall be self-contained modules that can be installed without turning off power to the unit and programming of modules shall not be required. Module wiring connections shall be of the type that allow insertion of solid wires without any nut. Each module shall contain its own surge protection.

ELECTRIC: Controller shall be completely electric in operation. Controller shall be installed and wired in accordance with manufacturer's published instructions. Controller shall be capable of operating from an independent power supply. Primary shall be 115V a.c., 60Hz or 230V, 50Hz.

WARRANTY: Controller shall have a manufacturer's limited warranty of three (3) years.

G. RAIN SENSOR SmartLine/ Weather Stations SLWS

WEATHER STATION(s) shall be model SLWS manufactured by Weathermatic Sprinkler Division of Telco Industries. Weather stations must be compatible for use with SmartLine Irrigation controls.

CONSTRUCTION: Weather station shall be wireless in design using radio-frequency communication. Weather station shall have integrated on-site sensors for rain-outlet of freeze shut-off and calculation of daily evapotranspiration irrigation deficits. Weather station shall have an integral mounting bracket with a two-point articulating arm made from an impact molded resin. Weather station shall be suitable for outdoor mounting in light-commercial or residential environments. Weather station shall be capable of two-way communications with the SmartLine system and have independent power supply, self-diagnostic and microprocessor.

OPERATION: Weather station rain sensor shall be adjustable to interrupt irrigation after a user selected precipitation amount of 1/8", 1/4" or 1/2". Weather station shall be capable of interrupting irrigation after temperatures reach below 37 degrees Fahrenheit. Weather station shall provide instant notification to the controller of either a rain or freeze event and upon closing of the same. Evapotranspiration deficits shall be calculated daily and transmitted to the Weather controller each day.

WARRANTY: Weather station shall have a manufacturer's limited warranty of two (2) years

H. IRRIGATION CONTROL WIRING

1. Irrigation Control wires shall be minimum of 18 Gauge Direct Burial wire approved for use in irrigation.

2. CONSTRUCTION: Conductors must be soft drawn, annealed, solid copper conforming to ASTM 33. Contractor insulation must be polyvinyl chloride (PVC) conforming to UL #4403.

Multiple insulated conductors shall be laid in and enclosed in a single outer jacket of thick, high-density, sunlight resistant polyethylene conforming to ICEA 581-402 and NEMA WCS. The conductors must be color-coded: normally one conductor white for common and the other three colored. All conductors shall be the same size.

A. REMOTE CONTROL VALVES Hunter ICV Filter Set/Valve

The valve shall be available in a globe body style with 1 inch Female National Pipe Thread (NPT) inlet and outlet. The 3/4 inch model shall be available in a combination globe/angle configuration. When specified, the valve shall be configured with British Standard Pipe threads. The valve shall be equipped with a flow control mechanism with removable handle that will regulate flow from full on to completely off. When specified for use with reclaimed water, a reclaimed water identifier handle shall be available.

The body and bonnet shall be made of non-corrosible, glass-reinforced nylon, rated to 220 PSI (15 bar, 1500 kPa). The body of the valve shall have brass inserts, with through-holes, which will accept the bonnet bolts. The bonnet bolts shall be serviceable with a slotted screwdriver, Phillips screwdriver, or a hex wrench, and shall be held captive in the bonnet when the bonnet is removed from the valve body. The diaphragm assembly shall be of modified EPDM construction, reinforced with nylon fabric and have a EPDM seating material. The valve shall be equipped with an internal filter as well as a self-cleaning metering rod, so only clean water can enter the solenoid chamber. An optional filter cleaning system that cleans a stainless steel filter each time the valve opens and closes shall be available. All metal parts internal to the valve shall be manufactured from corrosion-resistant stainless steel. The standard electrical shall be a 24 VAC unit with a 370mA break-out current and 1/8 inch holding current at 60 cycles and a 475 mA break-out current and 230 mA holding current at 50 cycles. When specified, the unit shall be equipped with a DC tripping solenoid for use with battery-operated controllers. The solenoid shall be an encapsulated, condenser unit with captive plunger. It shall be equipped with manual internal and external bleed capability to release the upper chamber water to the downstream piping, or to atmosphere, allowing the valve to open.

The valve shall carry a five-year, exchange warranty (not promoted). The valve shall be manufactured by Hunter Industries Incorporated, San Marcos, California.

B. VALVE & SPIRICE BOXES

1. All valve boxes shall meet specifications, be sized 1" valves in 7" valve box 1.5" and larger valves in 10" valve box. All valve boxes & installed as shown on detail sheets. Top of valve boxes shall be flush and level with grade when installed. Contractor to reinstall and re-level boxes if soil settling occurs.

2. Where possible and feasible install valve boxes within planting bed lines. No valve boxes shall be installed closer than 3' of any sidewalk or other pedestrian use surface, 5' from any vehicular roadway, walkway or any other low-point.

K. POP-UP SPRAY HEADS Hunter PRO Series PPS 40 PSI as per plan

The sprinkler shall be available with a 6 or 12-inch pop-up stroke, depending on the body specified, to bring the nozzle into a clean environment. The sprinkler shall be available as an aboveground shroud head. The sprinkler shall have the option of either a standard or factory-installed shroud head capable of extending up to 10 feet (3.0 m) in elevation change. When specified as factory-installed, the sprinkler shall have the words "CHECK VALVE" stamped in white lettering on the body cap. The sprinkler shall have available an optional, snap-on cap, molded in purple polyethylene, or a replacement body cap, molded in purple to indicate the use of reclaimed water. A vandalism-resistant locking cap shall be available as a field-installed option.

The sprinkler shall have a standard pressure-regulating device as an integral part of the pop-up stem. This regulator will prevent fogging or misting of the nozzle spray pattern by maintaining a constant nozzle outlet pressure of 30 PSI for use with Spray Nozzles and constant nozzle outlet pressure of 40 PSI for MP Rotator Nozzles with inlet pressures of up to 100 PSI, regardless of the radius of nozzle installed.

The body of the sprinkler shall be constructed of corrosion and UV-resistant, heavy-duty A.B.S. The floor of the sprinkler shall be constructed of aluminum and UV-resistant A.B.S. and shall be adjustable for pattern alignment. The floor shall be compatible with female threaded nozzles and shall have a stainless steel spring for positive retraction when irrigation is complete.

The sprinkler shall have a pressure-activated, multi-function, UV stable valve seat that will clean debris from the pop-up stem while it retracts. The seat shall be molded around a rigid plastic ring to prevent seal deformation. This seat shall prevent the sprinkler from sticking in the up position and be capable of sealing the sprinkler floor stem to the sprinkler cap under normal operating pressures. The seat shall be removable from the cap for easy service and shall be replaceable.

The sprinkler shall have a factory-installed, removable flush cap with a pull-up tab that shall prevent debris from entering the sprinkler during installation and allow the system to be flushed before installing the nozzle. The flush cap shall have a directional flushing action that allows the water to escape only in one direction. The flush cap shall open as the stem extends and completely close when the stem is in the retracted position.

The sprinkler shall have an exposed surface diameter after installation of 2-1/4 inches (6.35 cm). In addition, the 6-inch (15 cm) and 12-inch (30 cm) sprinklers shall be available with a 1/2-inch FNPT side inlet. When specified with a factory-installed check valve, the 6-inch (15 cm) and 12-inch (30 cm) sprinklers will be supplied without the side inlet.

The sprinkler shall carry a five-year, exchange warranty (not promoted).

The sprinkler shall be manufactured by Hunter Industries Incorporated, San Marcos, California.

2. Hunter MP Rotator Nozzles

The sprinkler shall produce and maintain a matched precipitation rate no greater than 0.6" per hour throughout the arc adjustment range and radius adjustment range, (up to 25% of radius adjustment), when spaced at 50% of wetted diameter.

The part circle sprinkler shall have an infinitely adjustable arc from 45° to 105°, 90° to 210° or between 210° to 270° depending on the model selected. The full circle sprinkler shall irrigate a full 360°. The 45° to 105° model shall not require coverage from adjacent sprinklers closer than 3' from the head.

Full or part circle sprinklers shall be capable of up to 25% radius reduction using a stainless-steel radius adjustment screw. The radius reduction screw shall have a slip clutch mechanism to prevent internal damage if turned past the minimum or maximum radius settings. The radius reduction screw shall reduce the pressure and flow upstream of the adjustable orifice thereby maintaining stream integrity.

Part circle sprinklers shall have an adjustment control using a stainless-steel ring. The adjustment ring shall be effective only while the sprinkler is popped up and shall be ineffective while the sprinkler is popped down. When turned past the minimum or maximum arc limits the adjustment mechanism shall have a ratcheting action to prevent internal damage.

This same ratcheting action shall allow the orientation of the left edge of the valve arc when installed on a fixed floor or in a pop-up body. This is independent of and in addition to any ratchet that may exist in a pop-up body.

The sprinkler shall shall pop-up at approximately 15 psi of water pressure. Upon cessation of water pressure, the sprinkler shall fully retract. When installed in a pop-up body the sprinkler shall shall pop-up after the body stem is almost fully extended. Upon decreasing pressure, the sprinkler shall shall pop-down before the pop-down of the body stem is complete.

The sprinkler's adjustable orifice shall be manufactured from polyurethane and acetal plastic materials for durability.

The sprinkler shall be fitted with a detachable filter.

Sprinkler Assembly models MP Corner, MP Side Step, MP Left Step, MP Right Step, MP1000, MP2000, MP3000 & MP3000 shall be able to be installed in pop-up bodies having a 5/8-27 UNS male threaded stem, at all common pop-up heights. Sprinkler Assembly shall also be able to be attached to a 1/2 FNPT x 5/8-27 UNS male threaded adapter for use on fixed pipe stems. Models MP Corner V17, MP Globe Side V17, MP Left Side V17, MP Right Side V17, MP1000 V17, MP2000 V17 & MP3000 V17 shall be able to be installed in pop-up spray head bodies having a 5/8-28 UNS female threaded stem, at all common pop-up heights. Sprinkler Assembly shall also be able to be attached to a 1/2 FNPT x 5/8-28 UNS female threaded adapter for use on fixed pipe stems.

L. DripLine Tubing Hunter HDL

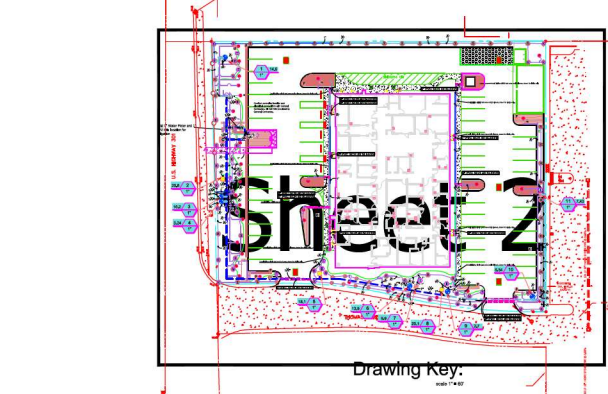
1. The Hunter DripLine (HDL) family of products includes HDL-PCL, HDL-CV, and HDL-R. HDL provides constant irrigation at designated flows and emitter spacing and conforms to an inside diameter (ID) of 0.8007 (1/4.2 mm) and an outside diameter (OD) of 0.8007 (1/4.2 mm). The HDL-CV incorporates a check valve function that will hold back up to 6" (1.5 m) of elevation (2.0 PSI, 0.2 bar check valve).

2. DripLine, covered, pressure-compensating HDL dripLine manufactured by Hunter Industries. Pressure-compensating drippers installed during extrusion process at factory shall have regular intervals and flows as specified by model.

DripLine shall be available in the following options:

M. Contractor to verify quantities of materials. Quantities supplied are a courtesy and Consultant is not responsible for errors in quantities or dimensional errors in design.

SYMBOL	MANUFACTURER/MODEL/DESCRIPTION	QTY	PSI
1	Hunter IC2-01-254-F-R 1" Drip Control Zone Kit, 1in. ICV Globe Valve with 1in. HY100 filter system, Pressure Regulation: 25psi, Flow Range: 2 GPM to 20 GPM, 150 mesh stainless steel screen.	5	5
2	Hunter PL-4V Manual flush/shut off valve, barbed insert. Typically installed in 1/2in. box, with adequate Marking tubing to extend valve out of valve box. Use with HDL or other 3/4in. diameter.	14	
3	Hunter EC04D-12 EC04D-12 1/2in. FIP connection with 15 psi - 100 psi operating pressure. Specify with Hunter SJ swing joint.	5	
4	Hunter HDL-04-12-254-Ring Drip Ring 2 Row 1/2 Drip Line	55	25
5	Area to Receive DripLine Hunter HDL-04-12-254-R IC2-01-254-F-R DripLine with 0.9 GPH flow, Light brown tubing with black splicing. Emitters at 12" O.C. DripLine laterals spaced at 12" apart, with emitters offset for staggered pattern. Install with Hunter PLD barbed or PLD-4C fittings.	3,094	25
6	Hunter ICV-G-45-R 1" 1in., 1/2in., 3/4in., and 3in. Plastic Electric Remote Control Valves, Globe Configuration, with NPT Threaded Inlet/Outlet, for Commercial/Municipal Use, With Filter Sentry.	6	



IRRIGATION_SCHEDULE

SYMBOL MANUFACTURER/MODEL/DESCRIPTION

T	Hunter MP Corner PROS-06-PRS40-CV-F-R T Turf Rotator, 6in. pop-up with factory installed check valve, foguard, pressure regulated to 40 psi, MP Rotator nozzle on PRS40 body. T=Turquoise adj arc 45-105.
L	Hunter MP Strp PROS-06-PRS40-CV-F-R LCS Turf Rotator, 6in. pop-up with factory installed check valve, foguard, pressure regulated to 40 psi, MP Rotator nozzle on PRS40 body. LCS=Ivory left strip, SS=Brown side strip, RCS=Copper right strip.
R	Hunter MP Strp PROS-06-PRS40-CV-F-R RCS Turf Rotator, 6in. pop-up with factory installed check valve, foguard, pressure regulated to 40 psi, MP Rotator nozzle on PRS40 body. LCS=Ivory left strip, SS=Brown side strip, RCS=Copper right strip.
S	Hunter MP Strp PROS-06-PRS40-CV-F-R SS Turf Rotator, 6in. pop-up with factory installed check valve, foguard, pressure regulated to 40 psi, MP Rotator nozzle on PRS40 body. LCS=Ivory left strip, SS=Brown side strip, RCS=Copper right strip.
M	Hunter MP1000 PROS-06-PRS40-CV-F-R M Turf Rotator, 6in. pop-up with check valve, foguard, pressure regulated to 40 psi, MP Rotator nozzle on PRS40 body. M=Maroon adj arc 90 to 210, L=Light Blue 210 to 270 arc, O=Olive 360 arc.
K	Hunter MP2000 PROS-06-PRS40-CV-F-R K Turf Rotator, 6in. pop-up with factory installed check valve, foguard, pressure regulated to 40 psi, MP Rotator nozzle on PRS40 body. K=Black adj arc 90-210, G=Green adj arc 210-270, R=Red 360 arc.
B	Hunter MP3000 PROS-06-PRS40-CV-F-R B Turf Rotator, 6in. pop-up with factory installed check valve, foguard, pressure regulated to 40 psi, MP Rotator nozzle on PRS40 body. B=Blue adj arc 90-210, Y=Yellow adj arc 210-270, A=Gray 360 arc.
D	Hunter MP800SR PROS-06-PRS40-CV-F-R ADJ Turf Rotator, 6in. pop-up with check valve, foguard, pressure regulated to 40 psi, MP Rotator nozzle on PRS40 body. ADJ=Orange and Gray (arc 90-210), 360=Lime Green and Gray (arc 360)

SYMBOL MANUFACTURER/MODEL/DESCRIPTION

	Hunter ICZ-101-25-LF-R 1" Drip Control Zone Kit. 1in. ICV Globe Valve with 1in. HY100 filter system. Pressure Regulation: 25psi. Flow Range: 2 GPM to 20 GPM. 150 mesh stainless steel screen.
F	Hunter PLD-BV Manual flush/shut off valve, barbed Insert. Typically installed in 10in. box, with adequate blank tubing to extend valve out of valve box. Use with HDL or other 3/4in. dripline.
I	Hunter ECO-ID-12 ECO-ID: 1/2in. FPT connection with 15 psi - 100 psi operating pressure. Specify with Hunter SJ swing joint.
	Hunter HDL-09-12-250-R Drip Ring Drip Ring 2 Row 12" Drip Line
	Area to Receive Dripline Hunter HDL-09-12-250-R HDL-09-12-PC: Hunter Dripline with 0.9 GPH flow, light brown tubing with black striping. Emitters at 12" O.C. Dripline laterals spaced at 12" apart, with emitters offset for triangular pattern. Install with Hunter PLD barbed or PLD-LOC fittings.

SYMBOL MANUFACTURER/MODEL/DESCRIPTION

	Hunter ICV-G-FS-R 1" 1in., 1-1/2in., 2in., and 3in. Plastic Electric Remote Control Valves, Globe Configuration, with NPT Threaded Inlet/Outlet, for Commercial/Municipal Use. With Filter Sentry.
	Hunter ICV-G-FS-R 1" 1in., 1-1/2in., 2in., and 3in. Plastic Electric Master Valve, Globe Configuration, with NPT Threaded Inlet/Outlet, for Commercial/Municipal Use. With Filter Sentry Factory Installed Option, and Reclaimed Water ID, Purple Handle.
	Watts 007 1" max. flow rate is 7.5 ft/s.
	Weathermatic SL1600 with (3) SLM4 SmartLine 12-zone controller. Internal 120VAC/230VAC transformer, large backlit LCD display
	Weathermatic SLW5 Wireless Weather Sensor for ET Based Watering, 900mhz - 1500ft. line of site range
	Water Meter 1"

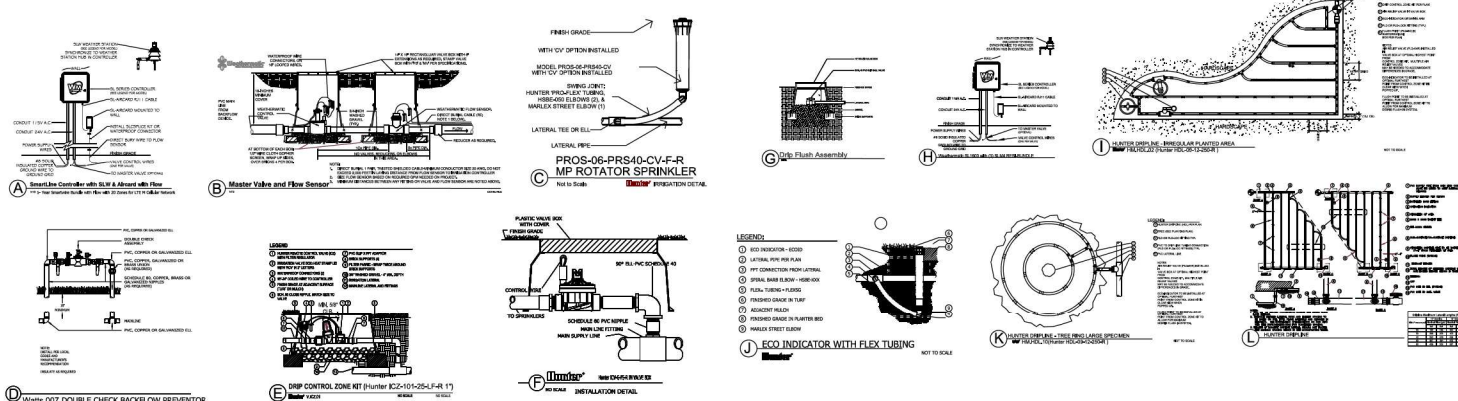
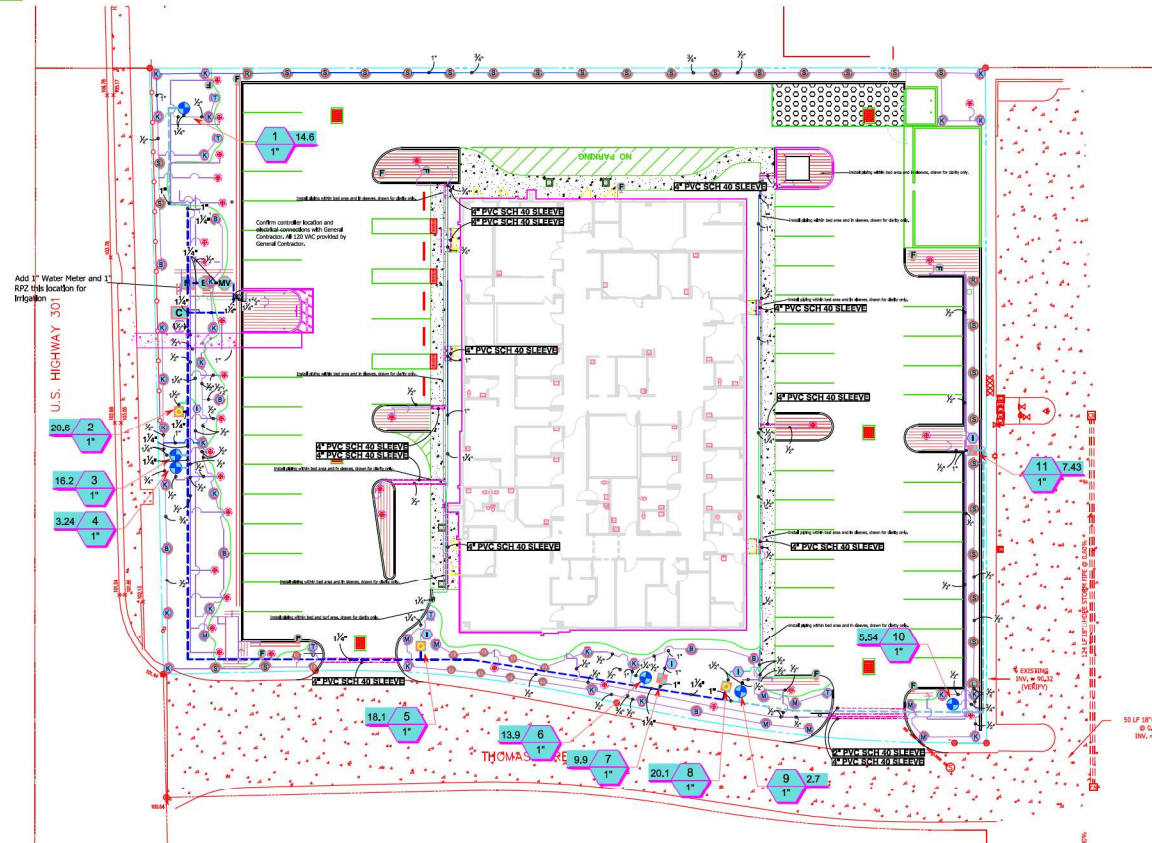
Sunshine
State
One Call
of Florida, Inc.

CALL 811 BEFORE YOU DIG

CRITICAL ANALYSIS

Generated:	2025-02-28 14:25
P.O.C. NUMBER: 01	
Water Source Information:	
FLOW AVAILABLE	1"
Water Meter Size:	5.00 ft
Flow Available:	37.5 GPM
PRESSURE AVAILABLE	
Static Pressure at POC:	60 PSI
Elevation Change:	5.00 ft
Service Line Size:	4"
Length of Service Line:	20 ft
Pressure Available:	57 PSI
DESIGN ANALYSIS	
Maximum Station Flow:	16.23 GPM
Flow Available at POC:	37.5 GPM
Residual Flow Available:	21.27 GPM
Critical Station:	1
Design Pressure:	40 PSI
Friction Loss:	3.4 PSI
Fittings Loss:	0.34 PSI
Elevation Loss:	0 PSI
Loss through Valve:	3 PSI
Pressure Req. at Critical Station:	46.7 PSI
Loss for Fittings:	0.05 PSI
Loss for Main Line:	0.49 PSI
Loss POC to Valve Elevation:	0 PSI
Loss for Backflow:	3 PSI
Loss for Master Valve:	3 PSI
Loss for Water Meter:	1.16 PSI
Critical Station Pressure at POC:	54.4 PSI
Pressure Available:	57 PSI
Residual Pressure Available:	2.57 PSI

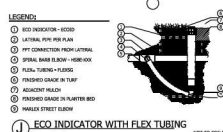
Contractor to verify quantities of materials. Quantities supplied are a courtesy and Consultant is not responsible for errors in quantities or dimensional errors in design.



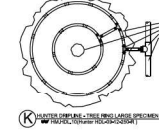
Watts 007 DOUBLE CHECK BACKFLOW PREVENTOR

DRIP CONTROL ZONE KIT (Hunter ICZ-101-25-LF-R 1")

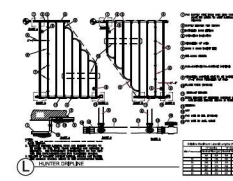
Weathermatic SLW5



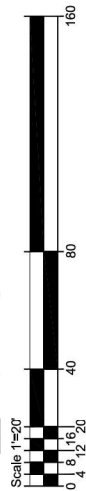
ECO INDICATOR WITH FLEX TUBING



PLASTER CRACKS - TIES (SEE SPECIFICATIONS)



Hunter MP2000



scale: 1"=20'
sheet: IR2
of: 2

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Irrigation Plan

UF Health Oxford
Wildwood, Florida



scale: 1"=20'
sheet: IR2
of: 2

SHEET HAS BEEN OPTIMIZED FOR COLOR PRINTING



A2 WEST ELEVATION - ENTRANCE CANOPY
SCALE: 1/8" = 1'-0"



B SOUTH ELEVATION
SCALE: 1/8" = 1'-0"



C EAST ELEVATION
SCALE: 1/8" = 1'-0"



D NORTH ELEVATION
SCALE: 1/8" = 1'-0"

EXTERIOR MATERIAL LEGEND

	EFS - COLOR 1		COMPOSITE METAL PANEL - WOOD LOOK
	EFS - COLOR 2		INSULATED VISION GLASS
	COMPOSITE METAL PANEL - COLOR 1		INSULATED SPANDREL GLASS
	COMPOSITE METAL PANEL - COLOR 2		HAND RUBBED CONCRETE

ESa
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615-329-9445
Firm License Number AAC001464
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Freestanding Emergency Department
UF Health Oxford

Street Name -- Wildwood, FL ZIP CODE

[illegible]

EXTERIOR
ELEVATIONS

Sheet Number

A2.01

UF Health Central Florida

John Maze
Associate Vice President Support Services
UF Health Central Florida
600 East Dixie Avenue
Leesburg, FL 34748

January 27, 2025

Melanie Strickland
Development Services Director – Project Review Committee
City Hall
100 N. Main Street
Wildwood, FL 34785
dsdinfo@wildwood-fl.gov

Subject: Technical Standards Waiver Request for proposed UF Health/Intuitive Health Oxford Freestanding Emergency Department (FSED), Wildwood, FL. Parcel ID D17-134 (north 1.40 acre portion). Project #Pending

Dear Ms. Strickland,

Thank you for taking the time to review the site plan for the proposed UF Health Freestanding Emergency Department (FSED) project in Wildwood, FL. Enclosed, you will find:

- Exhibit A – Site plan detailing the building layout, parking spaces, and the associated floor plan for our proposed facility.
- Exhibit B – Plans from other facilities along with historical parking data for your reference.

1. Description of Waiver Request

We are requesting a waiver to reduce the number of parking stalls required under the City of Wildwood's LDR 6.6 (G) Table 6-12 Minimum Standards for Off-Street Parking Requirements for Non-Residential Land Uses. Specifically, Table 6-12 requires 1 parking stall per 250 square feet of gross floor area (GFA). Based on the proposed building size of ~14,211 square feet, 57 stalls would typically be required, while our site plan provides 52.

2. Regulation Subsection to be Waived

We are requesting a waiver to LDR 6.6 (G) Table 6-12, which stipulates minimum parking requirements based on GFA, to allow approval of our proposed 52 parking stalls for the Wildwood FSED.

3. Justification for Waiver Request

a. Surplus Parking Based on Historical Operational Data:

Historical data from other UF Health/Intuitive Health FSED locations supports that the proposed parking count will adequately meet operational demands & handle peak patient and staff volumes without exceeding available parking. Across comparable facilities, parking usage is consistently well below the number of provided stalls, even during peak patient volumes. See Exhibit A table attached for more information.

- Campfield Commons (12,490 sq. ft., 65 stalls provided): 27 surplus stalls based on actual usage.
- Dunn Avenue (12,274 sq. ft., 53 stalls provided): 17 surplus stalls based on actual usage.
- Clermont (14,281 sq. ft., 54 stalls provided): 26 surplus stalls based on actual usage.
- Proposed Wildwood (14,200 sq. ft., 52 stalls provided): Estimated 19 surplus stalls based on patient/staff projections.

b. Usable Floor Area (UFA) vs. Gross Floor Area (GFA)

The parking calculation based on GFA overestimates the actual parking demand for this facility. Non-active spaces such as the mechanical/plumbing/electrical rooms do not contribute to occupancy load and therefore do not generate parking demand. Additionally, the square footage of the exterior walls should be discounted. 5 parking stalls can be removed from GFA if these spaces are not included.

Additionally, non-occupied equipment storage, C.T. computer equipment, med. gas tank storage, clean storage, soil holding, EVS, and deliveries breakdown rooms are not typically found in medical office buildings or clinics. Not including these rooms in the parking calculation would further reduce the need for 4 stalls.

Deductions:

1. Exterior walls: 528 SF
2. MPE and TDR spaces: 772 SF
3. Non-occupied equipment storage, C.T. computer equipment, med. gas tank storage, clean storage, soil holding, EVS, and deliveries breakdown rooms: 970 SF
4. Total of items 1-3: 2,270 SF
5. Parking space reduction at 1# per 250 SF, using exterior walls and MPE/TDR spaces only:
 $1,300/250 = 5$ (rounded)
6. Parking space reduction at 1# per 250 SF: $2,270/250 = 9$ (rounded)

When recalculating parking based on Usable Floor Area (UFA)—which excludes these non-active spaces listed 1-3 above—the required stall count aligns more closely with our proposed 52 spaces. This approach reflects the actual usage patterns observed at our other facilities and ensures that parking supply meets but does not exceed demand.

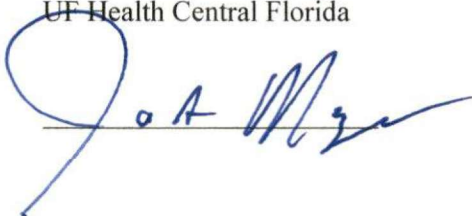
Given the operational data from existing facilities, the proposed 52 parking stalls will sufficiently serve the Wildwood FSED's needs. Reducing the requirement to reflect UFA rather than GFA more accurately represents real-world demand and avoids unnecessary overbuilding of parking infrastructure.

Thank you for your consideration of our request. We are confident that the justification provided demonstrates the adequacy of our proposed parking count.

If you have any questions or require additional information, please do not hesitate to contact me.

This letter outlines our formal request for a Technical Standards Waiver related to parking requirements for the proposed Wildwood FSED.

Sincerely,
John Maze
Associate Vice President Support Services
UF Health Central Florida



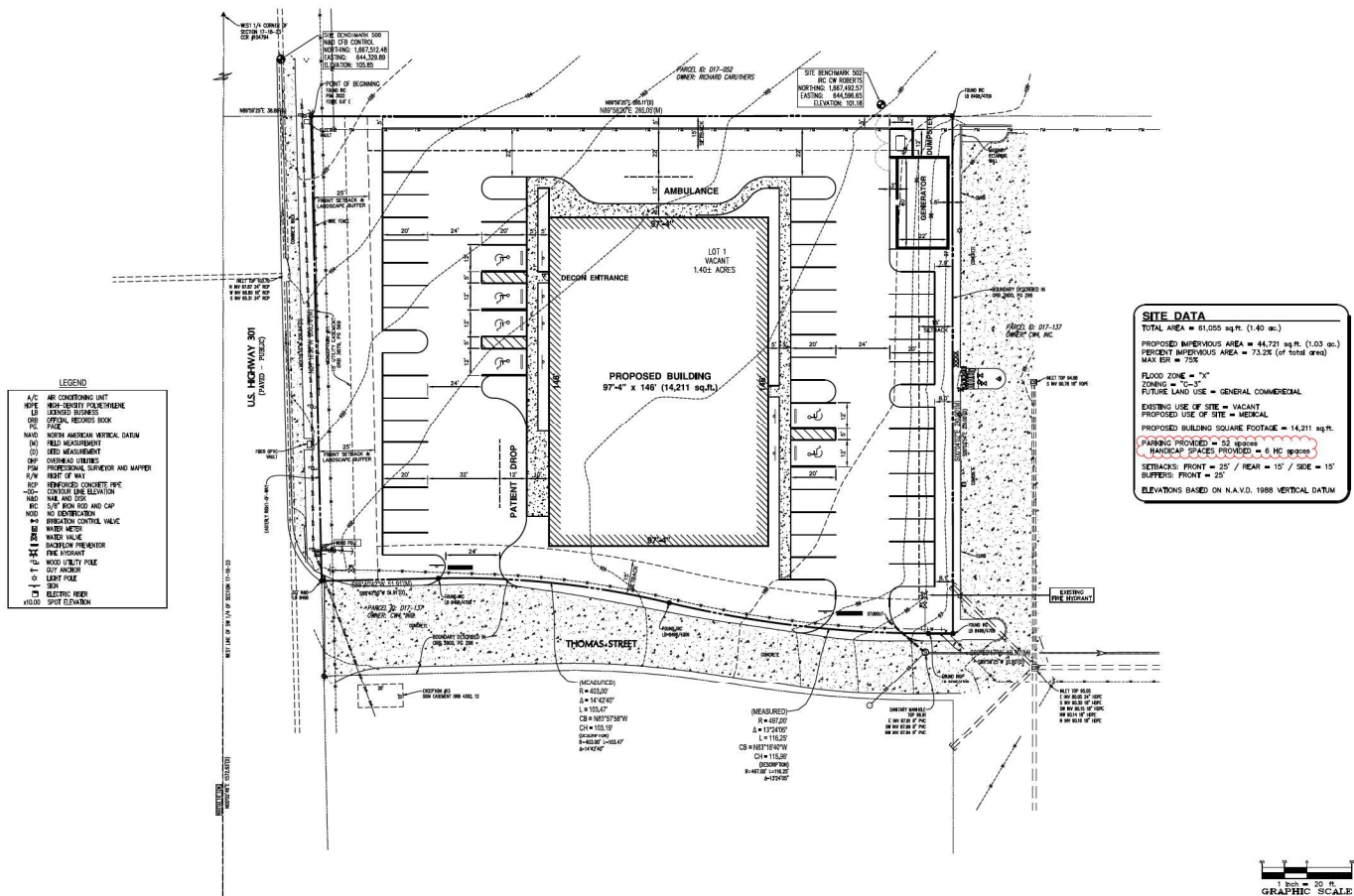


Exhibit B - Historical UF FSED Parking Data & Plans for Reference

UF-Intuitive Health FSED/Urgent Care Parking Statistics

Campfield Commons (Greenfield Site) - Jacksonville, FL

	ER Exam Rooms	FT Rooms	Avg Staff/Shift	Avg Patients/24 hrs	Patients at Peak Flow	Minimum Parking	Provided Parking		Total Parking Spaces	Surplus Stalls
							Regular Parking Spaces	HC Parking Spaces		
Square Feet: 12,490										
Count	9	5	16	67	22	38	62	3	65	27

Dunn Avenue (Greenfield Site) - Jacksonville, FL

	ER Exam Rooms	FT Rooms	Avg Staff/Shift	Avg Patients/24 hrs	Patients at Peak Flow	Minimum Parking	Provided Parking		Total Parking Spaces	Surplus Stalls
							Regular Parking Spaces	HC Parking Spaces		
Square Feet: 12,274										
Count	9	5	15	64	21	36	50	3	53	17

Lane Ave (Greenfield Site) - Jacksonville, FL

	ER Exam Rooms	FT Rooms	Avg Staff/Shift	Avg Patients/24 hrs	Patients at Peak Flow	Minimum Parking	Provided Parking		Total Parking Spaces	Surplus Stalls
							Regular Parking Spaces	HC Parking Spaces		
Square Feet: 11,718										
Count	7	5	17	71	21	38	36	2	38	0

Eustis (Old CVS Building) - Eustis, FL

	ER Exam Rooms	FT Rooms	Avg Staff/Shift	Avg Patients/24 hrs	Patients at Peak Flow	Minimum Parking	Provided Parking		Total Parking Spaces	Surplus Stalls
							Regular Parking Spaces	HC Parking Spaces		
Square Feet: 10,997										
Count	8	4	14	52	17	31	45	2	47	16

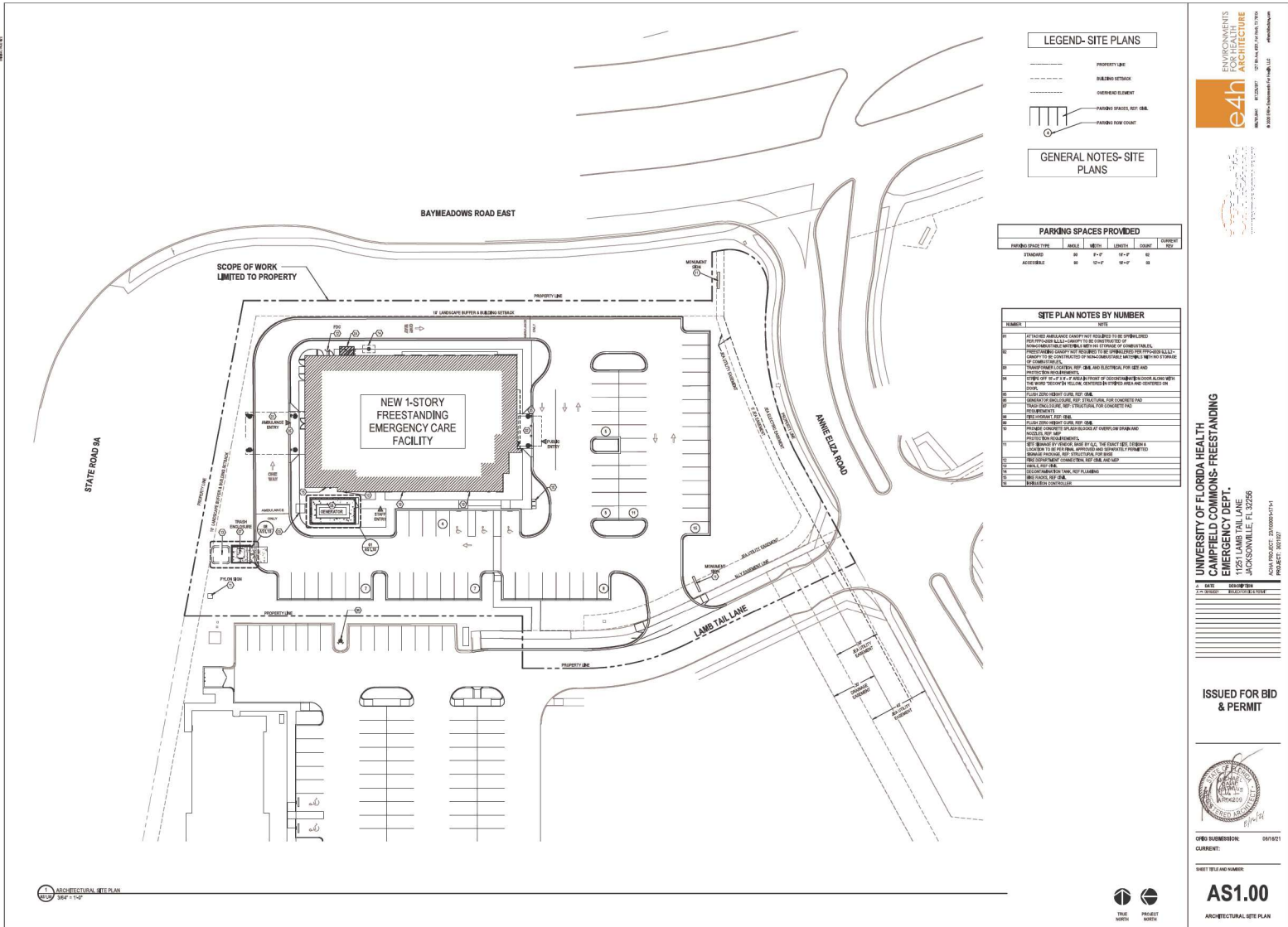
Clermont (Old CVS Building) - Clermont, FL

	ER Exam Rooms	FT Rooms	Avg Staff/Shift	Avg Patients/24 hrs	Patients at Peak Flow	Minimum Parking	Provided Parking		Total Parking Spaces	Surplus Stalls
							Regular Parking Spaces	HC Parking Spaces		
Square Feet: 14,281										
Count	10	4	14	50	17	31	54	3	57	26

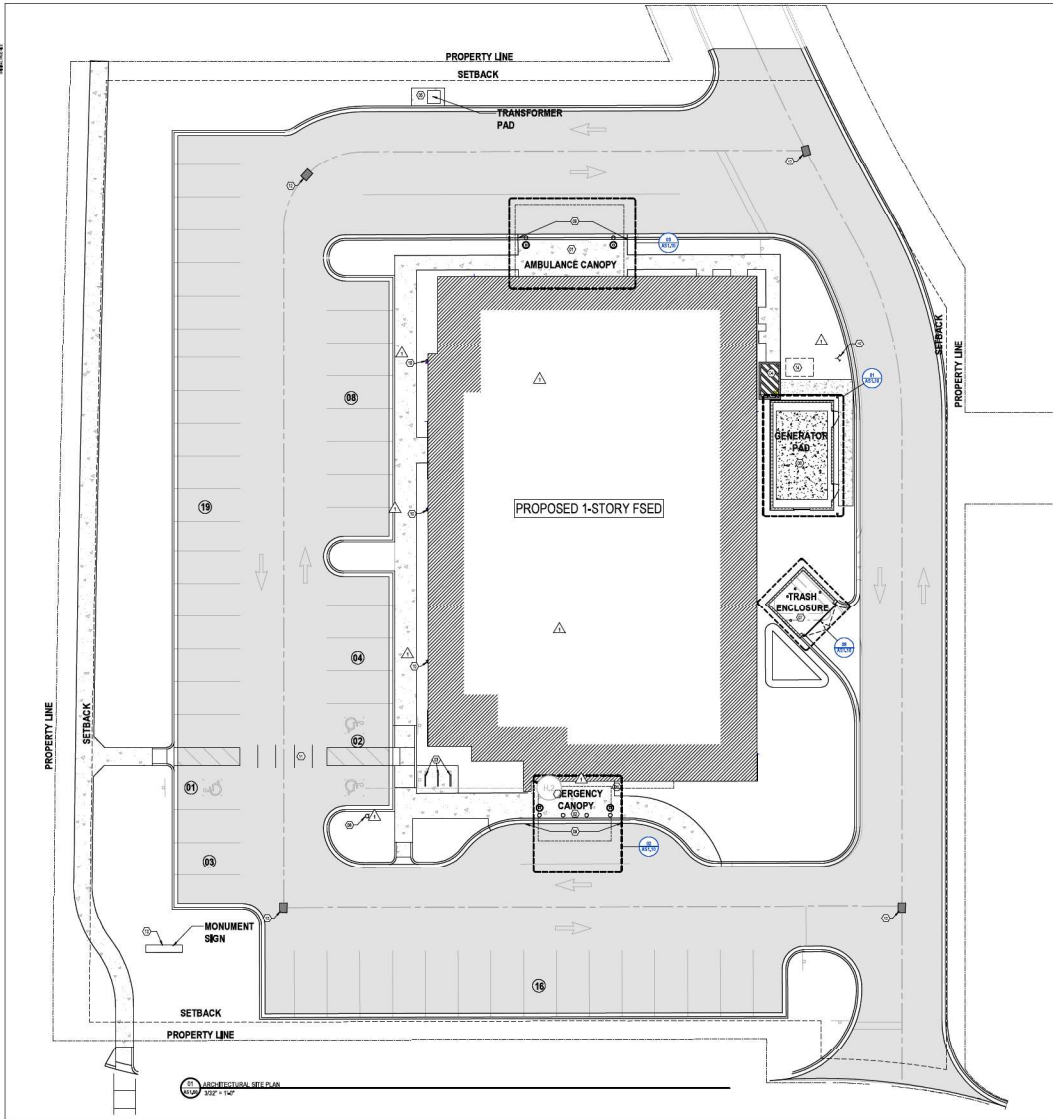
Proposed Wildwood (Greenfield) FSED - Wildwood, FL

	ER Exam Rooms	FT Rooms	Avg Staff/Shift	Avg Patients/24 hrs	Patients at Peak Flow	Minimum Parking	Provided Parking		Total Parking Spaces	Surplus Stalls
							Regular Parking Spaces	HC Parking Spaces		
Square Feet: 14,200										
Count	10	4	14	56	19	33	46	6	52	19

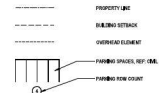
Campfield Commons



Dunn Ave



LEGEND- SITE PLANS



GENERAL NOTES- SITE PLANS

- [illegible]

PARKING SPACES PROVIDED

PAVING SPACE TYPE	ANGLE	WIDTH	LENGTH	COUNT	CURRENT REV
STANDARD	90	8'-0"	16'-0"	50	
ACCESSIBLE	90	12'-0"	16'-0"	03	

SITE PLAN NOTES BY NUMBER

[illegible]

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UNIVERSITY OF FLORIDA
DUNN VILLAGE - FREESTANDING
EMERGENCY DEPARTMENT
11277 NEW KINGS ROAD - JACKSONVILLE, FL 32219

DATE	DESCRIPTION
10/25/2021	RECEIVED FROM J & P INC
10/25/2021	PAID TO J & P
10/25/2021	PAID TO J & P CONSTRUCTION

Florida Business
LICENSE AK0001111



047321

DANIEL DAVID WATKINS AK0001111

NO BUSINESS ON: 04/23/2021

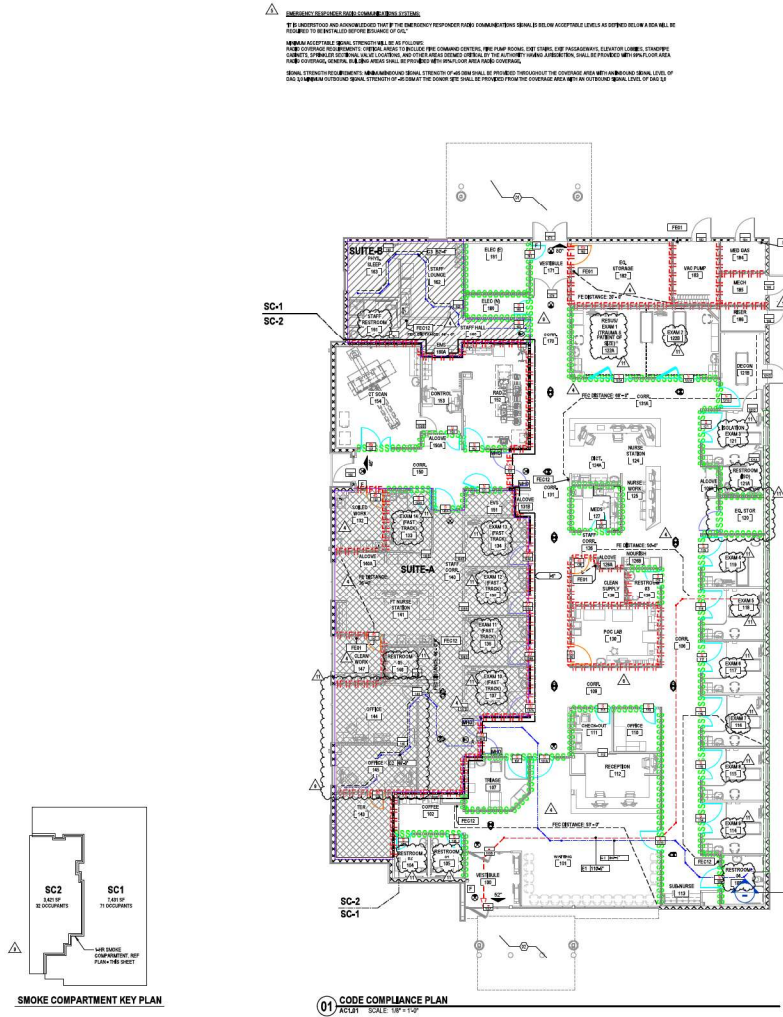
CURRENT: 10/22/2021

AS-05- FOR CONSTRUCTION

NOTE: THIS IS A PUBLIC DOCUMENT

AS1.00
ARCHITECTURAL SITE PLAN

Dunn Ave

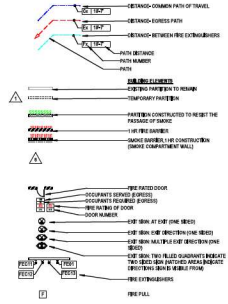


CODE COMPLIANCE - PROJECT INFO	
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PROJECT DESCRIPTION:
THE SCOPE OF WORK INCLUDES A NEW CONSTRUCTION PROJECTS IN AN EMERGENCY DEPARTMENT
PACED AND URGENT CARE FACILITY IN JACKSONVILLE, FLORIDA. THE INDUSTRY TYPE CONSISTS
OF MEDICAL TREATMENT WITH ALL ASSOCIATED ACCOMMODATIONS FOR ISOLATION ROOMS, PATIENTS
PATIENTS OF ALL AGES, AND MAJOR CARE PROCEDURES. THE FACILITY PROVIDES FAST-TRACK ROOMS ARE
DESIGNED TO SERVE THE USUALLY SHORT-TERM BUSINESS HOURS AND PROVIDE ADDITIONAL
CARE SPACE FOR THE EMERGENCY DEPARTMENT IN CASES OF NEED, UNPREDICTED SITUATIONS, SUCH
AS IT AND RADIOGRAPHY, SUPPORT CARE PROVIDED TO PATIENTS OF BOTH SEXES.

**THE FACILITY SHALL MEET THE REQUIREMENTS OF INTERNATIONAL GROUP A, CODED 2, PER IBC
AND BE USED FOR URGENT CARE ON A SCHEDULE BASIS FOR MORE THAN FIVE PERSONS
AND BE CAPABLE OF DEMONSTRATING:**

LEGEND- CODE COMP PLANS



GENERAL NOTES- CODE PLANS

1. IF THE NOTIFICATION SIGNALS SHOWN ARE **MODAL** (ALARMS) REQUIRED, REFER TO PARTITION TYPES, AND SPECIFICATIONS, FOR MORE INFORMATION.
2. IF THE NOTIFICATION SIGNALS **BY** PARTITIONS ARE SHOWN, MAKE PARTITIONS ARE NOT CUB BY DOORS, WINDOWS, STOREROOMS, OR OTHER OBJECTS, RATED PARTITION MAY BE ABOVE OBJECTS.
3. REFER TO 4-4H "SPECIAL SYSTEMS PLAN" FOR FULL FIRE ALARM PLAN.
4. MAKE **MINIMUM** DISTANCE OF TRAVEL TO REACH AN EXTINGUISHING MALL, NOT EXCEED MORE THAN 15 FEET AS REQUIRED BY FLORIDA BUILDING CODE 305, TABLE 601(1).

CODE COMPLIANCE NOTES BY NUMBER	
NUMBER	NOTE

01	ATTACHED AMBULANCE CANNOPY NOT REQUIRED TO BE SPHERULIZED PER PPPG-020 4.3.2.2 - CANNOPY TO BE CONSTRUCTED OF NONCOMBUSTIBLE MATERIALS WITH NO STORAGE OF COMBUSTIBLES.
02	PRESTANDARD CANNOPY NOT REQUIRED TO BE SPHERULIZED PER PPPG-020 4.3.2.2 - CANNOPY TO BE CONSTRUCTED OF NONCOMBUSTIBLE MATERIALS WITH NO STORAGE OF COMBUSTIBLES.

PER FBC 2002 TABLE 1004.6

OCCUPANT LOAD CALCULATIONS			
	OCCUPANT LOAD		FOOT

OCCUPANCY	AREA	FACTOR	OCCUPANT LOAD	REQ. EXIT WIDTH	WIDTH
SG-1		2			
MECHANICAL	889 SF	300	2	0.2	0.4
OCCUPANT	2,636 SF	100	88	0.2	1.8
			71		16.2
SG-2					
MECHANICAL	389 SF	300	1	0.2	0.2
OCCUPANT	3,141 SF	100	32	0.2	8.4
	3,427 SF		33		9.6
TOTAL	10,885 SF		104		3.8

EGRESS PATHS- LEVEL 1		
		CLASSROOM

	PATH	DISTANCE	REV
01		110-4"	
02		30-4"	
03		30-4"	
04		32-4"	

LIFE SAFETY NOTES				
DATE	TIME	LOCATION	EVENTS REQUIRED	MAX TRAVEL W/ INTERVENING

DATE	AGE	STATUS TYPE	PROBING	PROBING
DATE A	1,000 SF	NON-CLIPPING	22	66-47
DATE B	100 SF	NON-CLIPPING	91	63-47

FIRE EXTINGUISHER SCHEDULE	
CLASS	TYPE
1	ABC
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3	ABC
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100	ABC

TAG	DESCRIPTION	MODEL	STATUS	LOCATION
P01	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MAN GARD 9A
P02	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MAN GARD 9B
P03	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P04	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P05	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P06	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P07	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P08	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P09	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P10	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P11	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P12	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P13	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P14	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P15	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00
P16	MANAGED BY THE EXPANDER	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00	UNCOVERED	MANIPULATED DISCREPANCY TYPE 1A N/A, 0.00

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EMERGENCY DEPARTMENT**
11277 NEW KINGS ROAD - JACKSONVILLE, FL 32219

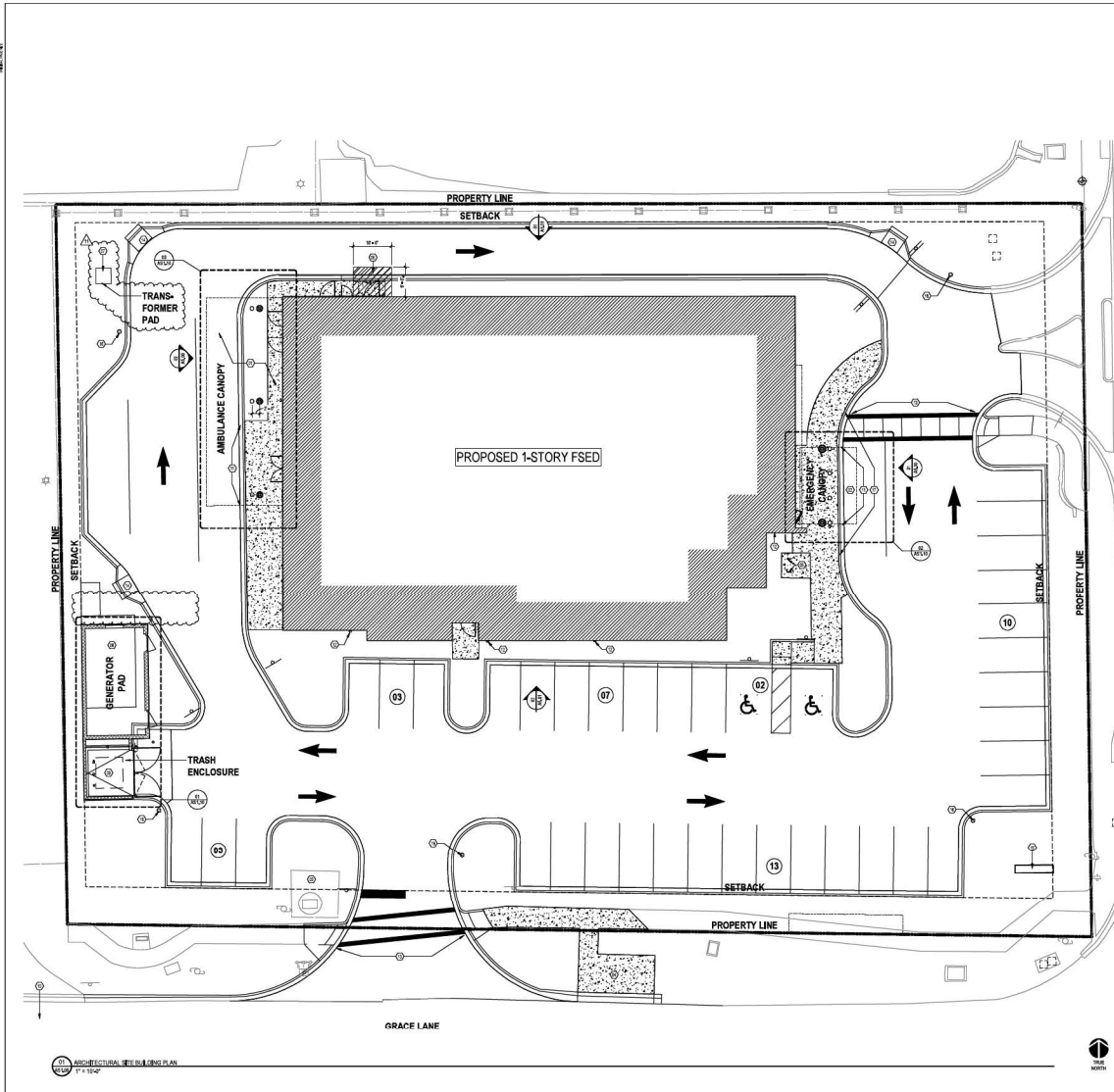
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Florida Business
License AR26021611

SUBMISSION: 04/23/21
 CURRENT: 02/17/2023
 AS: 09

AC1.01

Lane Ave



LEGEND- SITE PLANS



GENERAL NOTES- SITE PLANS

5. REFER TO ELECTRICAL DRAWINGS FOR ALL UTILITIES, DRAINAGE, PIPING, STORMS, ELECTRICAL, SEWAGE, AIR HANDLING, SPACEHEAT, SPACEVAC, AND VENT.
6. REFER TO ELECTRICAL DRAWINGS FOR DATA INFORMATION, INCLUDING BUT NOT LIMITED TO: ELECTRICAL PANEL SCHEDULES, ELECTRICAL PANEL SCHEDULES, LIGHTING LOADINGS, AND SEVERE TELEPHONE CABLE PANEL LOADS, ELECTRICAL, MANHOLE LOCATIONS, AND SEWER, SANITARY, AND STORMS PIPING, DRAINAGE, AND VENTILATION CIRCULATION.
7. REFER TO LANDSCAPE DRAWINGS FOR ALL LANDSCAPING AND BIODIVERSITY WORK.
8. REFER TO VENTURUS DESIGN PACKAGE FOR ALL MATERIALS AND ELECTRICAL DRAWINGS SUBMITTED UNDER SEVERAL PERMITS.
9. PROVIDE CONCRETE SLAB/BLIND ON ALL ROOF/DRAIN OUTLET, REF. MAP FOR LOCATIONS.
10. COORDINATE ALL UNDERGROUND SYSTEMS CONNECTIONS WITH ROOF DRAIN, REF. MAP AND GROUND FOR LOCATIONS.
11. GENERAL CONTRACTOR TO VERIFY ALL REQUIREMENTS FOR DRAINAGE/ROOF/PAVING/SEWER/STORMS/UNDERGROUND CONTRACT PRIOR TO CONSTRUCTION OF ANY WORK.

PARKING SPACES PROVIDED

PAVING SPACE TYPE	ANGLE	WIDTH	LENGTH	COUNT	CURRENT REV
STANDARD	90	8'-0"	18'-0"	26	
ACCESSIBLE	90	12'-0"	18'-0"	82	

SITE PLAN NOTES BY NUMBER

[illegible]

1 ANE AVENUE S

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UNIVERSITY OF FLORIDA HEALTH
LANE AVE - FREESTANDING
EMERGENCY DEPARTMENT
888 LANE AVE., JACKSONVILLE, FL 32205

[illegible]

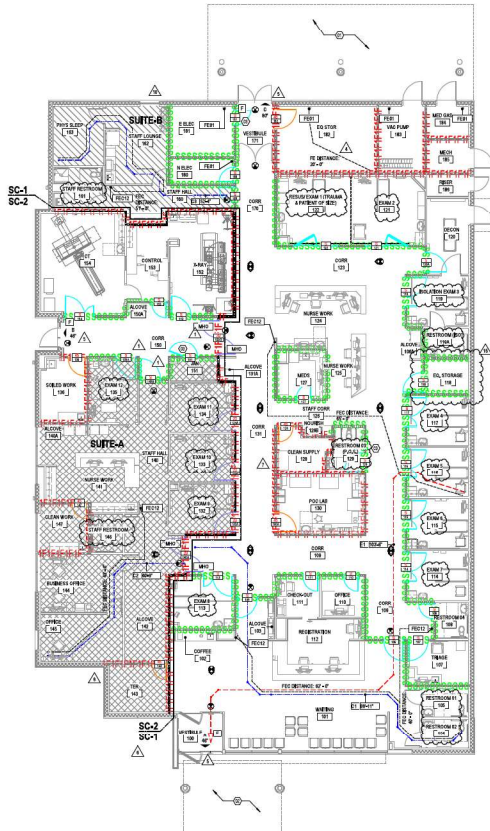
Florida Business
License: A42987511



OFFG SUBMISSION:	04/23/21
CURRENT:	12/17/21
	AS 09

AS1.00
OVERALL SITE PLAN

Lane Ave



01 CODE COMPLIANCE PLAN
ACLP1 SCALE: 1/8" = 1'-0"

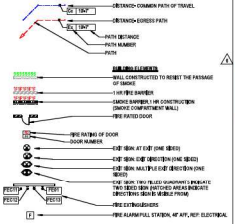


CODE COMPLIANCE - PROJECT INFO

PROJECT DESCRIPTION:
THE SCOPE OF WORK INCLUDES A NEW CONSTRUCTION PRESTRESSING EMERGENCY DEPARTMENT (ED) AND URGENT CARE (UC) CLINIC IN JACKSONVILLE, FLORIDA. THE EMERGENCY USED CONSTRUCTION WITH ACCOMPANYING NEW CONSTRUCTION PROCEDURES. PATIENTS OF ALL AGES AND MAJOR DRAIN PROCEDURES, FOUR SEPARATE WAIT-TRACK ROOMS ARE DESIGNED TO SERVICE THE UC DURING BUSINESS HOURS AND PROVIDE ADEQUATE STAFF SPACE FOR THE EMERGENCY DEPARTMENT IN TIMES OF NEED. BARRIERS STOPPED SUCH AS CT AND RADIOGRAPHY, SUPPORT CARE PROVIDED TO PATIENTS OF BOTH SEXES.

THE FACILITY SHALL MEET THE REQUIREMENTS OF INSTITUTIONAL GROUPS, CONDITIONS PER ADA AND BE USED FOR MEDICAL CARE ON A DAILY BASIS FOR MORE THAN FIFTY PATIENTS PER DAY AND BE ADAPTABLE TO SELF-REPAIRS.

LEGEND- CODE COMP PLANS



GENERAL NOTES- CODE PLANS

- [illegible]

CODE COMPLIANCE NOTES BY NUMBER

NAME:	NOTE
#1	ATTACHED <u>AMBULANCE</u> CANOPY NOT REQUIRED TO BE SPINNALED PER FP-200-20 4.3.3.1. CANOPY TO BE CONSTRUCTED OF NONCOMBUSTIBLE MATERIALS WITH NO STORAGE OF COMBUSTIBLES.
	PRE-STRANDED CANOPY NOT REQUIRED TO BE SPINNALED PER FP-200-20 4.3.3.2. CANOPY TO BE CONSTRUCTED OF NONCOMBUSTIBLE MATERIALS WITH NO STORAGE OF COMBUSTIBLES.
	PER FP-200-20, THE DOOR SHALL POLE PLATE AGAINST ADJACENT WALL AND SHALL NOT REDUCE THE REQUIRED EXITS WIDTH BY MORE THAN 1/4 INCHES IN THE FULLY OPEN POSITION. THE DOOR IN ANY POSITION SHALL NOT REDUCE THE REQUIRED EXITS WIDTH BY MORE THAN HALF.

OCCUPANT LOAD CALCULATIONS

OCCUPANCY	AREA	OCCUPANT LOAD FACTOR	OCCUPANT LOAD	REQ. FIRE RATING	TOTAL FIRE RATING
2ND					
MECHANICAL	752 SF	300 SF	0	0.2	5.6
OUTPATIENT	2903 SF	130 SF	87	0.2	11.4
5th FLOOR TOTAL: 3655 SF			87		17
3RD					
MECHANICAL	1196 SF	300 SF	0	0.2	6.2
OUTPATIENT	3075 SF	130 SF	88	0.2	12.4
5th FLOOR TOTAL: 4271 SF			88		18.6
GRAND TOTAL: 11842 SF			172		44.2

2020 PREC OCCUPANT / AMBULATORY GATE OCCUPANT LOAD FACTOR = 1.150
 2020 PREC 2020 PREC / AMBULATORY GATE OCCUPANT LOAD FACTOR = 1.150
 2020 PREC 2020 PREC / AMBULATORY GATE OCCUPANT LOAD FACTOR = 1.150

EGRESS PATHS- LEVEL 1

PATH	DISTANCE	CURRENT REV
C1	88-11"	
C2	103-8 1/2"	
C3	53-8 1/2"	
E1	113-4"	

LIFE SAFETY SUITES

SUITE	AREA	SUITE TYPE	SUITE'S REQUIRED / PROVIDED	MAX THROTTLE, BY INVENTORY, BY ROOM = 100
LEVEL 1				
SUITEA	1,000 SF	NONMULTIPLYING	2/2	48 x 9'
SUITED	544 SF	NONMULTIPLYING	1/1	52 x 8'

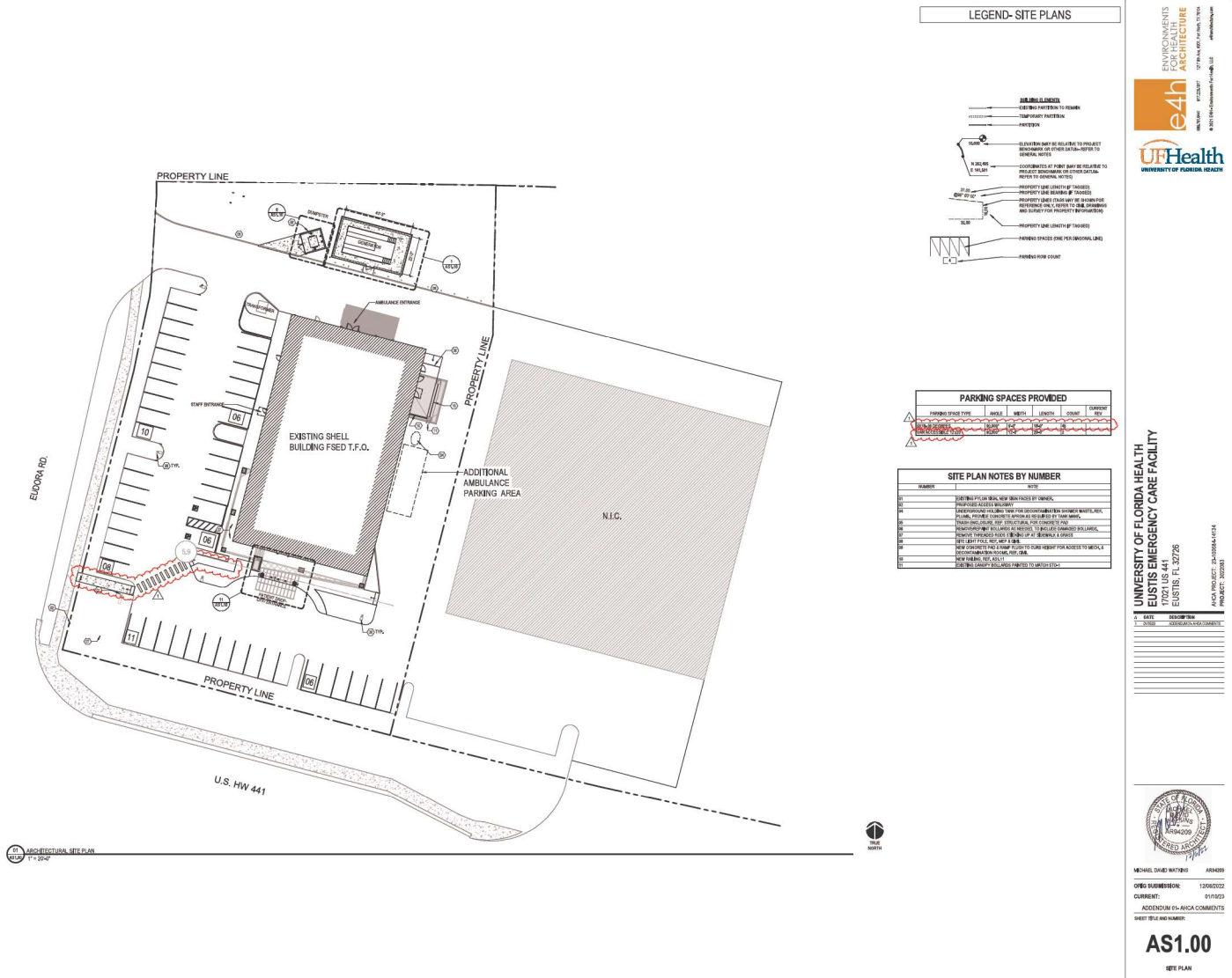
EXITS	
Number	Exit

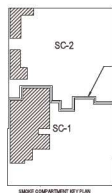
A	40"
B	40"
C	40"
TOTAL WIDTH REQUIRED: 40"	
TOTAL WIDTH REQUIRED: 40"	

FIRE EXTINGUISHER SCHEDULE

Taxi	Driver	Model	Max Price Service	Location
F001	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F002	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F003	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F004	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F005	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F006	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F007	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F008	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F009	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F010	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F011	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F012	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F013	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F014	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F015	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F016	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F017	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F018	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F019	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT
F020	WALSH/ANNE D CONNOR	MAZDA/2009 MAZDA3 SEDAN, THE ULTIMATE	40-45	INDEPENDENT

Eustis

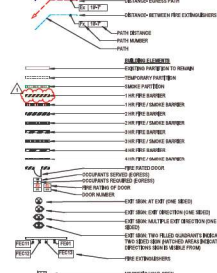




01 LIFE SAFETY PLAN
15L91 10" x 12"

LEGEND- LIFE SAFETY PLANS

DISTANCE - COMMON PATH OF TRAVEL



GENERAL NOTES-LIFE SAFETY PLANS

1. FIRE RESISTANCE RATINGS IN PARTITIONS ARE SHOWN WHERE PARTITIONS ARE NOT CUT BY DOORS, WINDOWS, STOREFRONTS, OR OTHER OBJECTS. RATED PARTITION MAY EXIST ABOVE OBJECTS.

LIFE SAFETY SUITES				
SUITE LEVEL 1	AREA	SUITE TYPE	DAYS REQUIRED / PROVIDED	MAX TRAVEL / INTERVIEW ROOM + 10'
	185 SF		20	27 11"
A	218 SF	MECHANICAL	01	33 2"
B	1,443 SF	OUTPATIENT	30	37 11"
C	222 SF	OUTPATIENT	01	36 0"

EXITS	
Exit Number	Exit Width
A	11'
B	17'
C	18'

LIFE SAFETY NOTES BY NUMBER

FRIDGE CLEAR AGENT TYPE EXTINGUISHER IN U.D. ROOM

EGRESS PATHS- LEVEL 1

	PUSH	DISTANCE	CURRENT REV
21		2004.102	
22		2751.17	
23		98.49	
24		65.107	
25		100.47	
26		102.4.102	

EXITING REQUIREMENTS-LEVEL 1

AREA	OCCUPANTS	SPRINKLERED	EXISTING WIDTH AND EXCEPTION OCCUPANCY	HORZ. EXIT WIDTH PER OCC (SPRINKLERED)	EXIT WIDTHS REQUIRED HORZ. EXITS	DURATION REV
REARLDR ST	107	Y	10'0" MIN. PER IBC 103.10.1.2	10'0"	25'0"	

FIRE EXTINGUISHER SCHEDULE

NO	DESCRIPTION	QUANTITY	CURRENT PRICE
FE01	WALL MOUNTED FIRE EXTINGUISHER	3	
FE02	WALL MOUNTED FIRE EXTINGUISHER CLEAN AGENT TYPE	1	
FE012	SEMI-PROTECTED FIRE EXTINGUISHER CABINET	4	

LIFE SAFETY • OCCUPANCY • LEVEL 1

NAME	AREA	AREA FUNCTION (S)	AREA PER OCCUPANT	OCCUPANTS	CURVES REV
S0-1					
MECHANICAL	11A/10 SF	PRO-2000 MECHANICAL	1000M SF	1	
OUTPATIENT	53/14 SF	PRO-2000 OUTPATIENT	1000M SF	54	
S0-2					
MECHANICAL	10A/6 SF	PRO-2000 MECHANICAL	1000M SF	2	
OUTPATIENT	84B/18 SF	PRO-2000 OUTPATIENT	1000M SF	58	
	100A/14 SF			59	



UNIVERSITY OF FLORIDA HEALTH
EUSTIS EMERGENCY CARE FACILITY

A	DATE	DESCRIPTION
---	------	-------------



MICHAEL DAVID WATKINS ARMO

DATE SUBMITTED: 12/05/20

CURRENT: 01/10/2011

ADDENDUM 01- AHCA COMMENT

TABLE 10-16 AND NUMBER

LS1 01

LO1.01

LIFE SAFETY PLAN-LEVEL 1

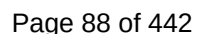
[illegible]

1720338



AS1.00

EXITS	
Exit Number	Exit Width
A	140"
B	94"
C	20"



City of Wildwood, Florida

Planning & Zoning Board/Special Magistrate

The case below was heard on Tuesday, August 5, 2025, 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-story, 14,211 SF medical building (freestanding emergency room) providing for 51 parking spaces including five (5) Florida ADA-accessible parking spaces and two (2) EV charging stations, a generator enclosure, and dumpster enclosure, together with associated infrastructure such as landscaping buffers and site lighting improvements, on 1.40 acres MOL. The property is generally located approximately 0.46 miles south of the intersection of US Hwy 301 and CR 466, fronting US Hwy 301.

Case Number: A25-0583 UF Health Oxford Freestanding Emergency Department

Applicant(s): Boldt c/o Faeq Hussain

Owner(s): SoLiv Wildwood LLC

Parcel(s): Portion of Parcel D17-134

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

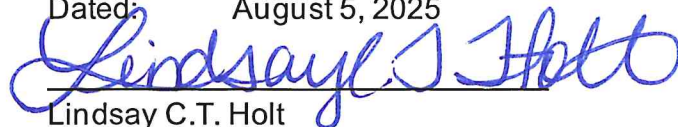
☐ recommends approval.

☒ recommends approval with the following conditions:

Satisfaction of outstanding City attorney comment

☐ recommends denial.

Dated: August 5, 2025



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

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: Swear in City Staff and Public Speakers

REQUESTED ACTION:

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: **FY25 Third Budget Amendment**

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

As discussed at the Commission Workshop on August 18th, 2025, staff recommends a budget amendment for the FY25 budget year. In this budget amendment, several expense accounts will show the following changes.

The transfer amount from the General Fund to the Community Redevelopment Agency Fund was amended as it was originally budgeted using the incorrect millage rate for FY25. Additionally, the excess funds identified for FY25 were included in the transfer from the General Fund to the Utility Capital Projects Fund.

Parks and Recreation was updated to recognize donations received throughout the fiscal year for various events and athletic programs. The Bicycle and Pedestrian Master Plan project, approved by the commission in June 2025, was added to the department's professional services expense account, and the Baker House Fund now includes additional funding for further improvements.

RESOLUTION NO. R2025-26

A RESOLUTION OF THE CITY OF WILDWOOD, SUMTER COUNTY, FLORIDA, AMENDING THE FISCAL YEAR 2024-2025 BUDGET; AUTHORIZING THE CITY MANAGER OR HIS DESIGNEE TO TAKE ALL ACTIONS NECESSARY TO IMPLEMENT THE TERMS AND CONDITIONS OF THIS RESOLUTION; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, at the Final Budget Hearing on September 23, 2024, the City Commission of Wildwood, Sumter County, Florida, adopted Resolution No. R2024-23 approving the annual budget for Fiscal Year 2024-2025; and,

WHEREAS, the 2024-2025 budget was subsequently amended on March 10, 2025 via Resolution No. R2025-6; and,

WHEREAS, the 2024-2025 budget was subsequently amended on April 28, 2025 via Resolution No. R2025-11; and

WHEREAS, it is appropriate to provide for certain transfers, appropriations, and authorizations based upon previous and anticipated expenditures and revenues; and,

WHEREAS, the City Commission has determined that it is necessary to adopt an amendment to the budget to reflect these changes;

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COMMISSION OF THE CITY OF WILDWOOD, FLORIDA, THAT:

Section 1. Budget Amendment. The City Commission of the City of Wildwood, Sumter County, Florida, adopts this amendment to the Fiscal Year 2024-2025 budget as shown on Exhibit "A" attached hereto and incorporated by reference.

Section 2. This Resolution shall take effect immediately upon its adoption.

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: _____
Jessica Barnes, City Clerk

EXHIBIT A

General Fund

Expenditure	FY25 Adopted Bud	Increase/(Decrease)	FY25 Amended Bud
Transfer to CRA	\$231,880.00	\$15,644.97	\$247,524.97
Contingency	\$3,917,539.51	(\$15,644.97)	\$3,901,894.54

Justification for Amendment: In this amendment, the budget transfer from General Fund to CRA needs an amendment. During the FY25 budget cycle, the rolled-back rate was used instead of the adopted millage rate when calculating the transfer amount. Funding for this amendment will come from the reserves.

Expenditure	FY25 Adopted Bud	Increase/(Decrease)	FY25 Amended Bud
Transfer to Util Cap. Projects Fund	\$6,000,000.00	\$1,500,000.00	\$7,500,000.00
Contingency	\$3,901,894.54	(\$1,500,000.00)	\$2,401,894.54

Justification for Amendment: In this amendment, the budget transfer from General Fund to the Utility Capital Projects Fund needs an amendment. An excess has been identified when working on the FY26 budget cycle and projecting the ending balances for FY25. Funding for this amendment will come from the reserves.

Parks and Recreation

Expenditure	FY25 Adopted Bud	Increase/(Decrease)	FY25 Amended Bud
Special Events	\$170,000.00	\$18,000.00	\$188,000.00
Athletic Leagues & Activities	\$109,400.00	\$9,700.00	\$120,000.00

Revenue	FY25 Adopted Bud	Increase/(Decrease)	FY25 Amended Bud
Donations	\$0.00	\$27,700.00	\$27,700.00

Expenditure	FY25 Adopted Bud	Increase/(Decrease)	FY25 Amended Bud
Professional Services	\$14,000.00	\$131,600.00	\$145,600.00
Contingency	\$2,401,894.54	(\$131,600.00)	\$2,270,294.54

Justification for Amendment: In this amendment, the Parks and Recreation department is requesting an amendment for their Special Events and Athletic Leagues and Activities expense accounts. Throughout the fiscal year, donations have been received to help support certain events, i.e. the Eggstravaganza, and Happy Birthday America, to name a few, and athletic programs, like baseball. To help offset some of these expenses, the donation revenues will be utilized to fund this amendment. In addition, their Professional Services expense account needs an amendment for Bicycle Pedestrian Master Plan that was awarded to Kimley-Horn in June 2025. Funding for this amendment will come from the reserves.

Baker House Fund

Expenditure	FY25 Adopted Bud	Increase/(Decrease)	FY25 Amended Bud
Baker House Operations	\$900.00	\$35,000.00	\$35,900.00
Contingency	\$91,000.00	(\$27,000.00)	\$64,000.00

Revenue	FY25 Adopted Bud	Increase/(Decrease)	FY25 Amended Bud
Donations	\$15,000.00	\$8,000.00	\$23,000.00

Justification for Amendment: In this amendment, the Baker House Fund needs an amendment for some improvements needed for the Baker House. A mini-split unit, along with some improvements to interior wiring are being completed before the Baker House re-opens for the season. A portion of this amendment will be funded from the donation revenue, which is expected to exceed budgeted projections. The remainder will be funded by the reserves.

Utility Capital Improvement Fund

Revenue	FY25 Adopted Bud	Increase/(Decrease)	FY25 Amended Bud
Transfer From General	\$6,000,000.00	\$1,500,000.00	\$7,500,000.00

Justification for Amendment: In this budget amendment, the transfer from general fund revenue needs an amendment. An excess has been identified when working on the FY26 budget cycle and projecting the ending balances for FY25. These funds will be utilized towards the new WWTP project.

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: **A25-2689 (AN) South Wildwood Industrial Park West**

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

PARCEL F25-261

The applicant and owner, Harry Harmer, has submitted a voluntary annexation application for parcel F25-261. The property to be annexed totals 27.58 acres MOL and is located north of CR 519A, approximately 0.5 miles east of N US 301.

Annexation into the City is appropriate because the property is contiguous to the City limits and is within the City's Joint Planning Area with Sumter County, which allows for voluntary annexations within the planning area that would otherwise not be permissible under statute due to the creation of a "pocket" or "enclave."

City water is available to the subject property. The applicant would like to construct an expansion to the existing industrial park that exists to the west of the subject property. The applicant will work with the City Utilities department to connect to water services.

Staff recommends approval of Ordinance O2025-36.



McKenna Page
Planner I, Development Services

ORDINANCE NO. O2025-36

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROVIDING FOR THE VOLUNTARY ANNEXATION OF CERTAIN REAL PROPERTY CONSISTING OF APPROXIMATELY 27.14 ACRES LOCATED NORTH OF CR 519A, APPROXIMATELY 0.5 MILES WEST OF N US 301, IN SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST; WHICH IS CONTIGUOUS TO THE CITY LIMITS OF THE CITY OF WILDWOOD AND LOCATED IN THE CITY'S JOINT PLANNING AREA; PROVIDING THAT SECTION 1-14 OF THE CITY OF WILDWOOD CODE OF ORDINANCES IS AMENDED TO INCLUDE THE ANNEXED PROPERTY; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

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

SECTION 1. Based upon the petition of the owner of the following described real property, which is generally located north of CR 519A, approximately 0.5 miles west of N US 301, to be annexed into the City, the property is hereby annexed into the City of Wildwood pursuant to Sections 171.044 and 171.204, Florida Statutes. The City Commission finds that the property is contiguous to the City of Wildwood; is located within the City's Joint Planning Area with Sumter County; and meets all legal requirements for annexation. The annexed property lying in Sumter County, Florida, owned by Harry Harmer, is more particularly described as follows:

Parcel F25-261
Harry Harmer
Acres +/- 27.14

LEGAL DESCRIPTION

THAT PORTION OF THE SOUTHWEST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ OF SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST, SUMTER COUNTY, FLORIDA, DESCRIBED AS FOLLOWS: FOR A POINT OF REFERENCE, COMMENCE AT THE SOUTHEAST CORNER OF SAID SOUTHWEST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$;

THENCE RUN N. $00^{\circ} 05' 45''$ W., ALONG THE EAST LINE OF SAID SOUTHWEST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ A DISTANCE OF 25.00 FEET TO THE POINT OF BEGINNING OF THIS DESCRIPTION; FROM SAID POINT OF BEGINNING CONTINUE N $00^{\circ} 05' 45''$ W. ALONG THE EAST LINE OF SAID SOUTHWEST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ A

DISTANCE OF 638.78 FEET TO THE SOUTHWEST CORNER OF THE NORTH $\frac{1}{2}$ OF THE WEST $\frac{1}{2}$ OF THE SOUTHEAST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ OF SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST, SUMTER COUNTY, FLORIDA;

THENCE S. $89^{\circ} 50' 09''$ W., 90.96 FEET;

THENCE S. $00^{\circ} 10' 42''$ E., 638.35 FEET;

THENCE N. $89^{\circ} 50' 47''$ E., 90.04 FEET, TO THE POINT OF BEGINNING.

AND

THE SOUTH $\frac{1}{2}$ OF THE WEST $\frac{1}{2}$ OF THE SOUTHEAST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ OF SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST, SUMTER COUNTY, FLORIDA;

AND

THE EAST $\frac{1}{2}$ OF THE SOUTHEAST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ OF SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST, SUMTER COUNTY, FLORIDA;

LESS AND EXCEPT THE FOLLOWING:

EXCEPTION NO. 1: THE EAST 168.37 FEET OF THE NORTH 233.72 FEET OF THE SOUTH 258.72 FEET OF THE WEST $\frac{1}{2}$ OF THE SOUTHEAST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ OF SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST, SUMTER COUNTY, FLORIDA;

EXCEPTION NO. 2: THE WEST 168.37 FEET OF THE NORTH 233.72 FEET OF THE SOUTH 258.72 FEET OF THE EAST $\frac{1}{2}$ OF THE SOUTHEAST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ OF SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST, SUMTER COUNTY, FLORIDA;

EXCEPTION NO. 3: THE EAST 400.00 FEET OF THE WEST 568.37 FEET OF THE NORTH 217.80 FEET OF THE SOUTH 242.80 FEET OF THE EAST $\frac{1}{2}$ OF THE SOUTHEAST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ OF SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST, SUMTER COUNTY, FLORIDA;

EXCEPTION NO. 4: THE SOUTH 25.00 FEET OF THE SOUTHEAST $\frac{1}{4}$ OF THE NORTHEAST $\frac{1}{4}$ OF SECTION 25, TOWNSHIP 19 SOUTH, RANGE 22 EAST, SUMTER COUNTY, FLORIDA;

SECTION 2. All of the above described annexed property shall be liable for its proportionate share of the future and existing indebtedness of the City of Wildwood.

SECTION 3. All of the above described annexed property shall be subject to the laws and ordinances of the City of Wildwood as if this territory had been a part of the City of Wildwood at the time of passage and approval of said laws and ordinances.

SECTION 4. Until such time as the City amends its comprehensive plan, the current Sumter County zoning classification and future land use regulations will remain in full force and effect.

SECTION 5. Section 1-14 of the City of Wildwood Code of Ordinances is hereby amended to include the legal description of the annexed parcel pursuant to this Ordinance. The location map identifying the property to be annexed are attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 6. If any portion of this Ordinance is declared invalid for any purpose, the remaining portion shall remain valid and in full force and effect.

SECTION 7. This Ordinance shall take effect upon final approval by the City Commission.

SECTION 8. SCRIVENER'S ERROR. The city attorney may correct scrivener's errors found in this ordinance by filing a corrected copy of this ordinance with the city clerk.

DONE AND ORDAINED this _____ day of _____, 2025, by the City Commission of the City of Wildwood, Florida.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

Ed Wolf, Mayor

ATTEST: _____
Jessica Barnes, City Clerk

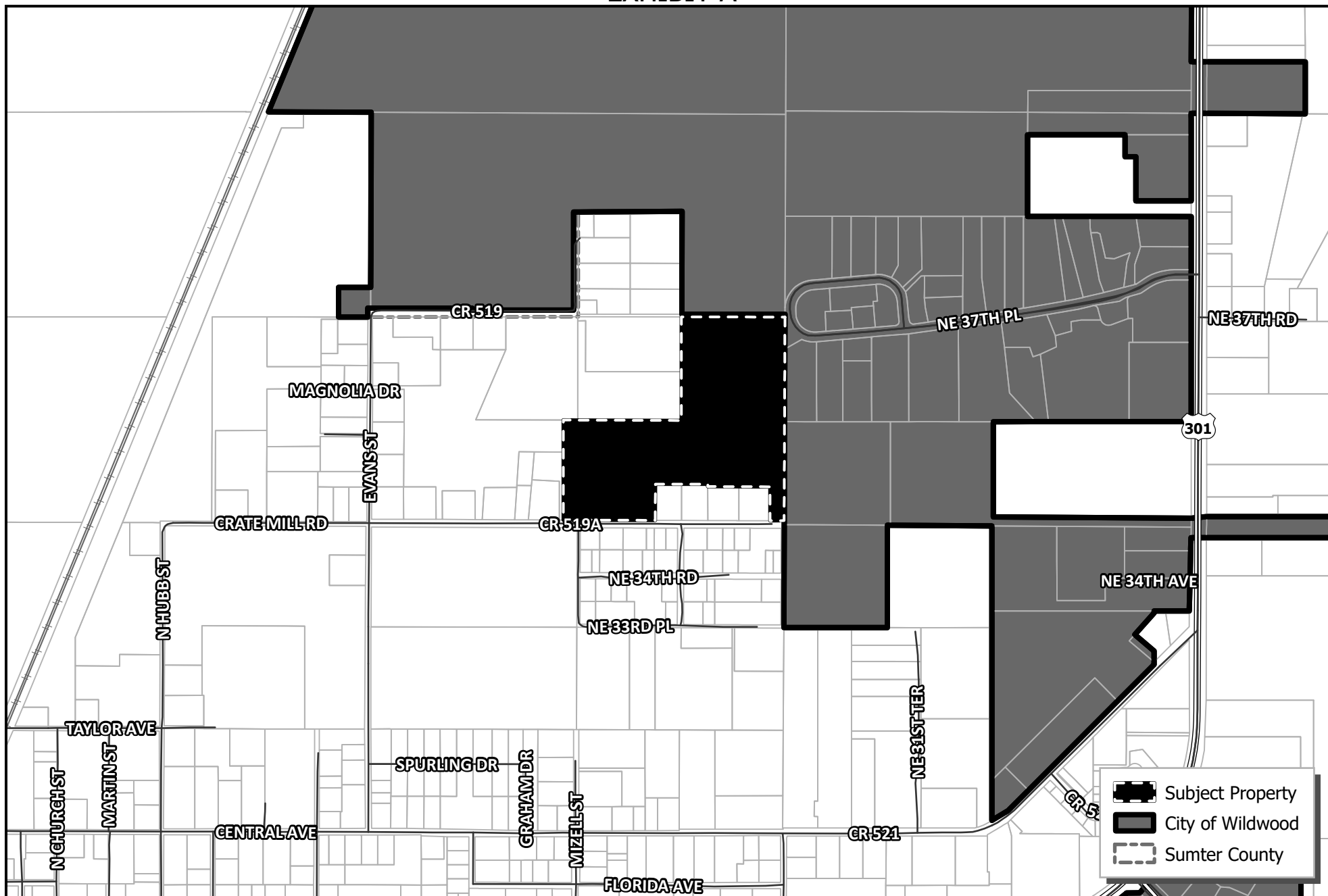
First Reading: _____

Second Reading: _____

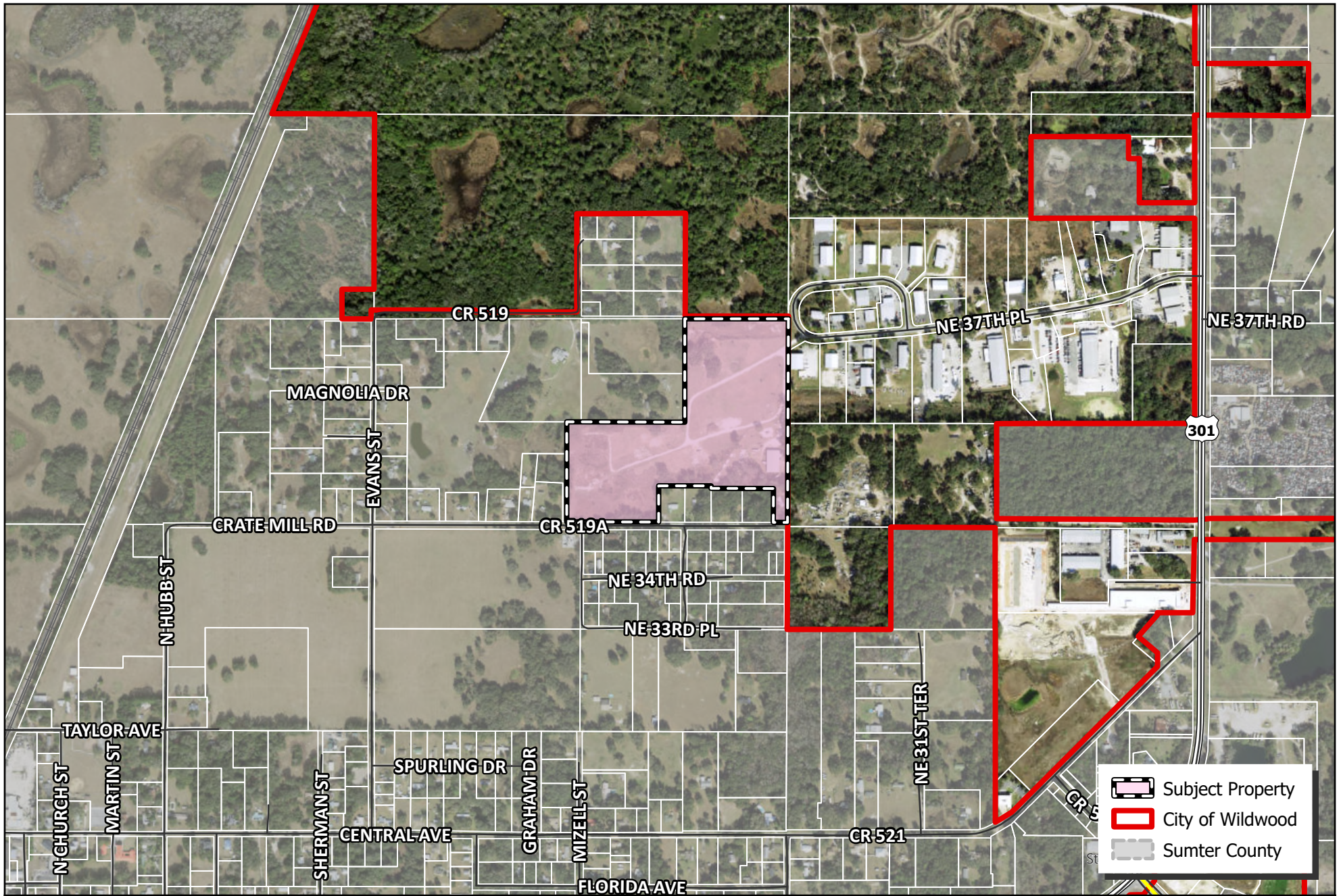
Approved as to form:

City Attorney

EXHIBIT A



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	N US Feet 0 187.5 375 750	#A25-2689 SOUTH WILDWOOD INDUSTRIAL PARK WEST PARCEL F25-261	MAP 1A LOCATION MAP JUL 2025
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 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	N US Feet 0 195 390 780	#A25-2689 SOUTH WILDWOOD INDUSTRIAL PARK WEST PARCEL F25-261	MAP 1B LOCATION MAP JUL 2025
--	--	--	--	--



Business Impact Estimate

This form should be included in the agenda packet for the item under which the proposed ordinance is to be considered and must be posted on the City of Wildwood website by the time notice of the proposed ordinance is published.

Proposed ordinance's title/reference: O2025-36

This Business Impact Estimate is provided in accordance with section 166.041(4), Florida Statutes. If one or more boxes are checked below, a business impact estimate is not required by state law¹ for the proposed ordinance. This Business Impact Estimate may be revised following its initial posting.

- ☐ The proposed ordinance is required for compliance with Federal or State law or regulation;
- ☐ The proposed ordinance relates to the issuance or refinancing of debt;
- ☐ The proposed ordinance relates to the adoption of budgets or budget amendments, including revenue sources necessary to fund the budget;
- ☐ The proposed ordinance is required to implement a contract or an agreement, including, but not limited to, any Federal, State, local, or private grant or other financial assistance accepted by the municipal government;
- ☐ The proposed ordinance is an emergency ordinance;
- ☐ The ordinance relates to procurement; or
- ☒ The proposed ordinance is enacted to implement the following:
 - a. Part II of Chapter 163, Florida Statutes, relating to growth policy, county and municipal planning, and land development regulation, including zoning, development orders, development agreements and development permits;
 - b. Sections 190.005 and 190.046, Florida Statutes, regarding community development districts;
 - c. Section 553.73, Florida Statutes, relating to the Florida Building Code; or
 - d. Section 633.202, Florida Statutes, relating to the Florida Fire Prevention Code.

¹ See Section 166.041(4)(c), Florida Statutes.



City of Wildwood, Florida PUBLIC NOTICE

Development Services Department
www.wildwood-fl.gov

RECEIVED

JUL 31 2025

City Of Wildwood
Development Services Dept

July 22, 2025

GOUGH GEORGE TIMOTHY
9423 LAKE LOTTA CIRCLE
GOTHA, FL 34734

Your Parcel Number(s): F25F137

→ 2814 NE 34TH RD, COLEMAN, FL

THIS LETTER IS TO INFORM YOU OF A PUBLIC HEARING FOR A PROPERTY NEXT TO YOURS.

NO CHANGES WILL BE MADE TO YOUR PROPERTY.

TO: Property owners in the vicinity of a property which is being considered by the City Commission for annexation.

APPLICANT: HARRY HARMER
OWNERS: HARRY HARMER
CASE NUMBER: A25-2689
PARCEL NUMBERS: F25-261

The subject property is generally located [fill in].

North of CP 519A across the 2 lane street from my property.

A first hearing before the City Commission will be held in the City Hall Commission Chamber, 100 North Main Street, Wildwood, FL on **August 11, 2025 at 9:00 a.m.** and a final reading to be held on **August 25, 2025 at 7:00 p.m.**

A25-2689 proposes a voluntary annexation of the above listed parcel.

Written comments submitted will be heard. Hearings may be continued from time to time as found necessary. Please return this form to: City of Wildwood, Development Services Department, 100 N. Main Street, Wildwood, FL 34785. Questions should be directed to the Development Services Department at (352) 330-1334.

The proposed Ordinance may be inspected by the public at the Development Services Department, Wildwood City Hall, between the hours of 8:00 a.m. to 5:00 p.m. weekdays.

APPEAL: NECESSITY OF RECORD. In order to appeal the Commission's decision in this matter, a verbatim record of the proceedings is required. The City Commission and the City of Wildwood assume no responsibility for furnishing said record.

☐ I support this request.

☐ I do not object to this request.

☒ I do not support this request for the following reason(s) We do not want an expansion of the existing industrial park moving closer to quiet country living. Noise, traffic, and impacts of increasing impervious area to an already low lying flood plane area. We need to preserve quiet country living. Build your industrial park somewhere else. The only reason to request annexation is to avoid buffering adjacent residents in accordance with County's Land Development Code and permitting requirements.

2817 C.R. 519-A
P.O. Box 523
Coleman, FL 33521
July 31, 2025

City of Wildwood, FL
108 North Main St.
Wildwood, FL 34785
(Letter dated July 22, 2025) (Case # A25-2689) (Parcel # F25-261)

Dear People,

We are residents across the road from the suggested property. We don't understand what Harry Harmer's intentions are to do with this property. It is swamp land, and has been $2\frac{1}{2}$ to 3 feet under water during heavy rain falls.

I highly suggest that you get S.W.F.W.M.D. involved in this matter.

Any construction on whatever on this property is bound to affect our water supply.

We highly reject this proposal.

Sincerely,
Austin & Ruth Daggett
Austin & Ruth Daggett

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: A25-2723 (AN) 5341 Lexington Cir Annexation

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Applicant Glenn Randy Tryan has submitted a voluntary annexation for parcel G16ED003 on behalf of property owners, Glen R. Tryan and Donna J. Tryan. The property to be annexed totals approximately 0.115 acres of land and is located at 5341 Lexington Circle, Wildwood, FL 34785.

Annexation into the city is appropriate because the property is located within the City's Joint Planning Area with Sumter County, which interlocal agreement allows for voluntary annexations within the planning area that would otherwise not be permissible under statute due to the creation of an "enclave." This application is historic in that this will be the first parcel located within the Heritage Wood and Lakes Estates Subdivision that will be annexed into the City as a result of the Joint Planning Area agreement. Other parcels have come into the City for Water and Sewer services, but have only signed the Covenant to Annex. The applicant purchased a vacant lot within this subdivision and is actively getting permits to place a manufactured home on the lot.

Upon completing the annexation process, the applicant will proceed with the small-scale comprehensive plan amendment and rezoning applications. The applicants have the option to proceed with MHP Zoning Designation, which would allow for the erection of a manufactured home or a single family residence at the home site. City water and sewer connections are currently available at the property.

Staff recommends approval of Ordinance O2025-37.

DATED:08/17/2025



Wendy Then, AICP, CFM
Assistant Director Development Services

ORDINANCE NO. O2025-37

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA, PROVIDING FOR THE VOLUNTARY ANNEXATION OF CERTAIN REAL PROPERTY CONSISTING OF APPROXIMATELY 0.115 ACRES LOCATED AT 5341 LEXINGTON CIR, WILDWOOD, FL 34785, APPROXIMATELY 150 FEET EAST OF THE INTERSECTION OF HERITAGE BLVD. AND LEXINGTON CIRCLE, IN SECTION 16, TOWNSHIP 19 SOUTH, RANGE 23 EAST; WHICH IS LOCATED IN THE CITY'S JOINT PLANNING AREA; PROVIDING THAT SECTION 1-14 OF THE CITY OF WILDWOOD CODE OF ORDINANCES IS AMENDED TO INCLUDE THE ANNEXED PROPERTY; PROVIDING FOR CODIFICATION; PROVIDING FOR CONFLICT; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

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

SECTION 1. Based upon the petition of the owner of the following described real property, which is located at 5341 Lexington Circle, Wildwood, FL 34785, approximately 150 feet east of the intersection of Heritage Blvd. and Lexington Circle, to be annexed into the City, the property is hereby annexed into the City of Wildwood pursuant to Sections 171.044 and 171.204, Florida Statutes. The City Commission finds that the property is located within the City's Joint Planning Area with Sumter County; and meets all legal requirements for annexation. The annexed property lying in Sumter County, Florida, owned by Glen R. Tryan and Donna J. Tryan, is more particularly described as follows:

Parcel G16ED003
Glen R. Tryan and Donna J. Tryan
Acres +/- 0.115

LEGAL DESCRIPTION

LOT 3 BLK D HERITAGE WOOD N LAKES ESTATES PB 4 PG 61-61A, OF THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA

SECTION 2. All of the above described annexed property shall be liable for its proportionate share of the future and existing indebtedness of the City of Wildwood.

SECTION 3. All of the above described annexed property shall be subject to the laws and ordinances of the City of Wildwood as if this territory had been a part of the City of Wildwood at the time of passage and approval of said laws and ordinances.

SECTION 4. Until such time as the City amends its comprehensive plan, the current Sumter County zoning classification and future land use regulations will remain in full force and effect.

SECTION 5. Section 1-14 of the City of Wildwood Code of Ordinances is hereby amended to include the legal description of the annexed parcel pursuant to this Ordinance. The location map identifying the property to be annexed are attached hereto as "Exhibit A" and incorporated herein by reference.

SECTION 6. If any portion of this Ordinance is declared invalid for any purpose, the remaining portion shall remain valid and in full force and effect.

SECTION 7. This Ordinance shall take effect upon final approval by the City Commission.

SECTION 8. SCRIVENER'S ERROR. The city attorney may correct scrivener's errors found in this ordinance by filing a corrected copy of this ordinance with the city clerk.

DONE AND ORDAINED this _____ day of _____, 2025, by the City Commission of the City of Wildwood, Florida.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

Ed Wolf, Mayor

ATTEST: _____
Jessica Barnes, City Clerk

First Reading: _____

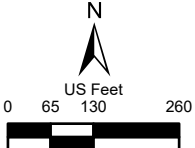
Second Reading: _____

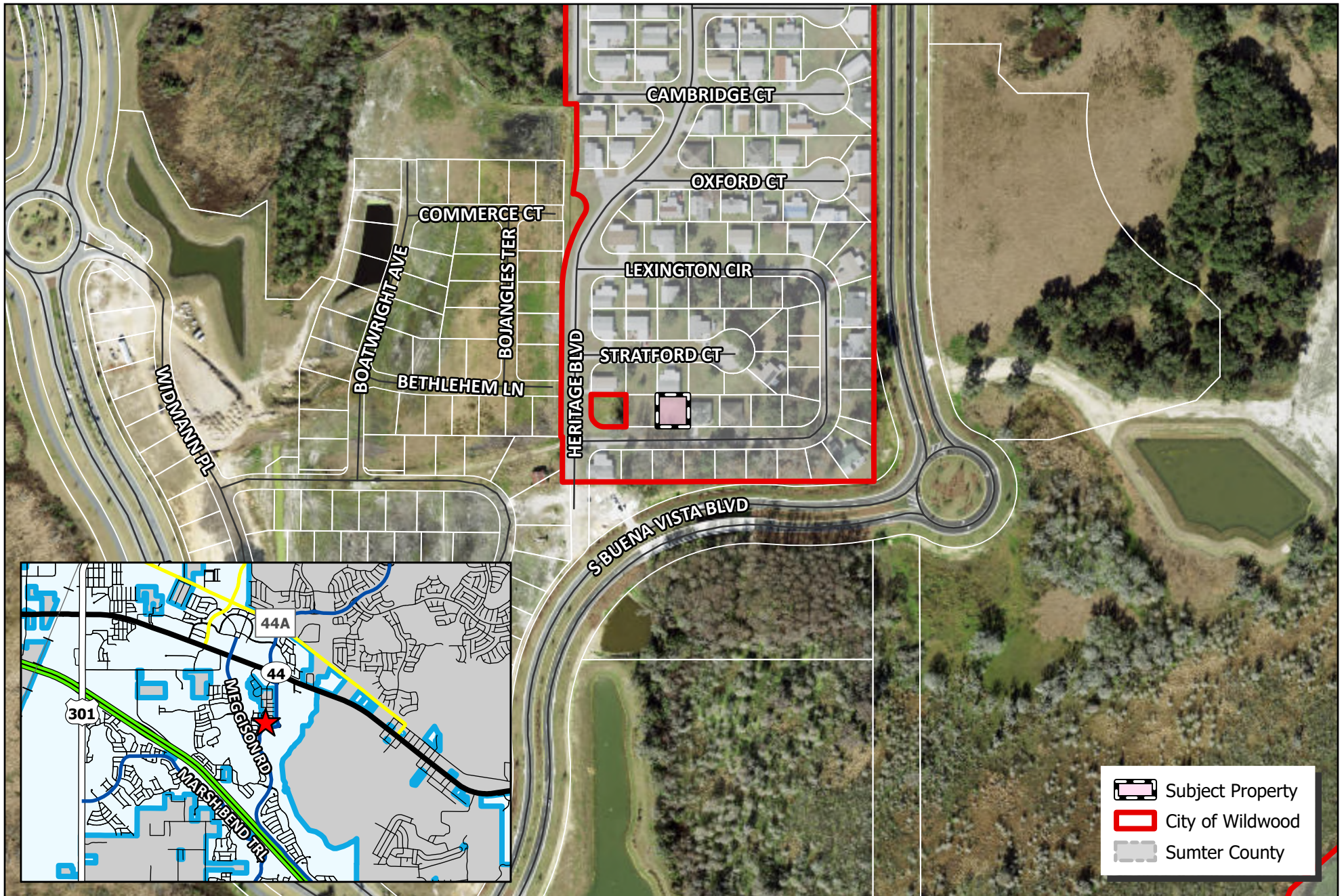
Approved as to form:

City Attorney

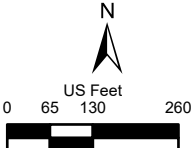
EXHIBIT A



	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov		#A25-2723 5341 LEXINGTON CIRCLE PARCEL G16ED003	MAP 1A LOCATION MAP JUL 2025
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-  Subject Property
-  City of Wildwood
-  Sumter County

 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 US Feet 0 65 130 260	#A25-2723 5341 LEXINGTON CIR PARCEL G16ED003	MAP 1B
				LOCATION
				MAP
				JUL 2025



Business Impact Estimate

This form should be included in the agenda packet for the item under which the proposed ordinance is to be considered and must be posted on the City of Wildwood website by the time notice of the proposed ordinance is published.

Proposed ordinance's title/reference: O2025-37

This Business Impact Estimate is provided in accordance with section 166.041(4), Florida Statutes. If one or more boxes are checked below, a business impact estimate is not required by state law¹ for the proposed ordinance. This Business Impact Estimate may be revised following its initial posting.

- ☐ The proposed ordinance is required for compliance with Federal or State law or regulation;
- ☐ The proposed ordinance relates to the issuance or refinancing of debt;
- ☐ The proposed ordinance relates to the adoption of budgets or budget amendments, including revenue sources necessary to fund the budget;
- ☐ The proposed ordinance is required to implement a contract or an agreement, including, but not limited to, any Federal, State, local, or private grant or other financial assistance accepted by the municipal government;
- ☐ The proposed ordinance is an emergency ordinance;
- ☐ The ordinance relates to procurement; or
- ☒ The proposed ordinance is enacted to implement the following:
 - a. Part II of Chapter 163, Florida Statutes, relating to growth policy, county and municipal planning, and land development regulation, including zoning, development orders, development agreements and development permits;
 - b. Sections 190.005 and 190.046, Florida Statutes, regarding community development districts;
 - c. Section 553.73, Florida Statutes, relating to the Florida Building Code; or
 - d. Section 633.202, Florida Statutes, relating to the Florida Fire Prevention Code.

¹ See Section 166.041(4)(c), Florida Statutes.

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: Clay Drain Road Name Change Ordinance

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

This ordinance is presented for approval following direction from the City Commission to move forward with the request from the Jacobs Family Trust to rename Clay Drain Road / CR 156 to Mike Jacobs Sr Road. The proposed renaming has been reviewed and approved by Sumter County and meets all applicable addressing standards and requirements. Upon final adoption by the City Commission, Sumter County will issue the corresponding 911 addressing notifications.

ORDINANCE NO. O2025-38

AN ORDINANCE OF THE CITY COMMISSION OF THE CITY OF WILDWOOD, FLORIDA, TO EXECUTE THE RENAMING OF CLAY DRAIN ROAD / CR 156 TO MIKE JACOBS SR ROAD; REQUESTING THE SUMTER COUNTY 911 COORDINATOR ISSUE ADDRESSES PURSUANT TO THIS ORDINANCE; AUTHORIZING THE CITY MANAGER OR DESIGNEE TO EXECUTE ANY NECESSARY DOCUMENTATION; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, on June 3, 2025, the City received a request from the Jacobs Family Trust to rename Clay Drain Road / CR 156 to Mike Jacobs Sr Road in honor of the family's long-standing history in Wildwood; and,

WHEREAS, the roadway is owned and maintained by the City of Wildwood; and,

WHEREAS, pursuant to the Interlocal Service Boundary and Joint Planning Agreement, the County shall be responsible for all 911 addressing within the City (Chapter 24, Article XII, section 3, Sumter County Code of Ordinances); and,

WHEREAS, this proposed road name change has been reviewed and approved by Sumter County as meeting all 911 addressing requirements and road naming standards; and,

WHEREAS, this request was presented to the City Commission at its regular meeting on June 23, 2025, where the Commission authorized staff to proceed with the road renaming process; and,

WHEREAS, the City now formally seeks to rename Clay Drain Road / CR 156 to Mike Jacobs Sr Road, as requested by the Jacobs Family Trust.

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

SECTION 1. The roadway described in the attached "Exhibit A" shall be known as Mike Jacobs Sr Road.

SECTION 2. The City Commission hereby requests that the Sumter County 911 Coordinator take all necessary steps to effect this change.

SECTION 3. The City Commission directs and authorizes the City Manager or designee to execute any necessary documentation to effect this change.

SECTION 4. This ordinance shall take effect ninety (90) days after its final reading by the City Commission of the City of Wildwood.

SECTION 5. SCRIVENER'S ERROR. The city attorney may correct scrivener's errors found in this ordinance by filing a corrected copy of this ordinance with the city clerk.

DONE AND ORDAINED this _____ day of _____, 2025, by the City Commission of the City of Wildwood, Florida.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

Ed Wolf, Mayor

ATTEST: _____
Jessica Barnes, City Clerk

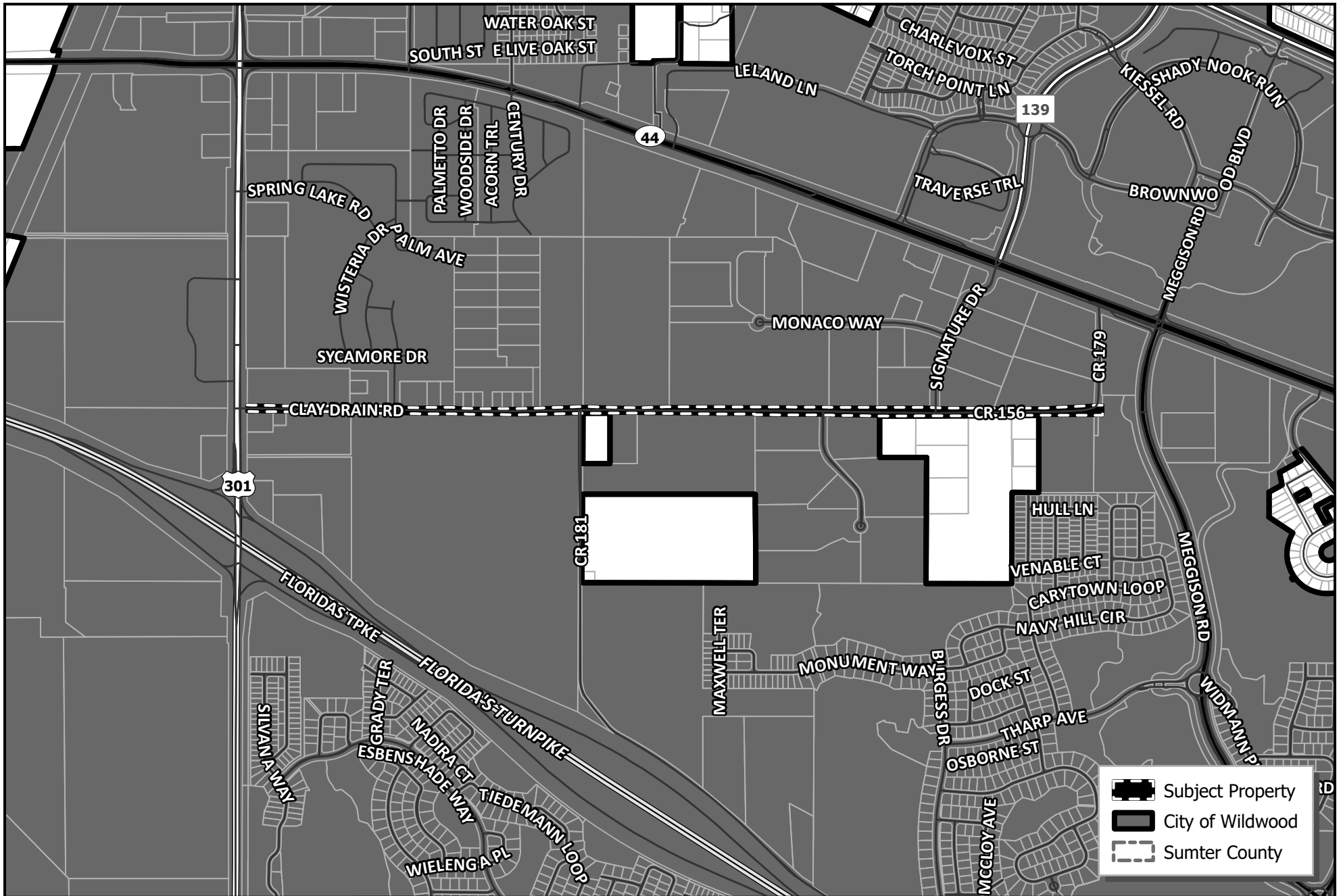
First Reading: _____

Second Reading: _____

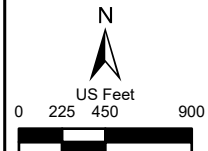
Approved as to form:

City Attorney

EXHIBIT A



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

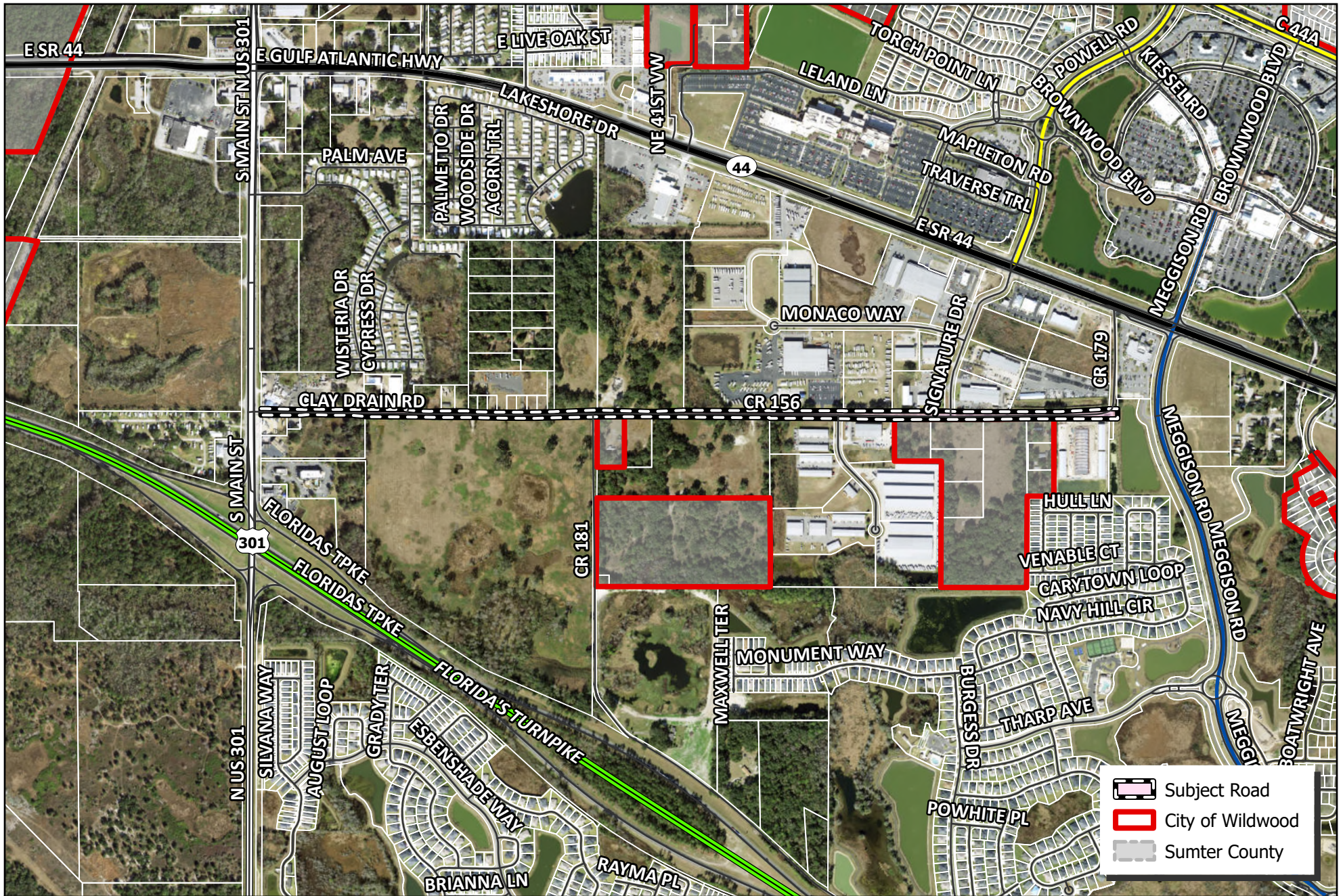


CLAY DRAIN RD AND CR 156 RENAMING

MAP 1A

**LOCATION
MAP**

JUL 2025



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	N US Feet 0 237.5 475 950 	CLAY DRAIN RD AND CR 156 RENAMING	EXHIBIT A LOCATION MAP JUL 2025
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Business Impact Estimate

This form should be included in the agenda packet for the item under which the proposed ordinance is to be considered and must be posted on the City of Wildwood website by the time notice of the proposed ordinance is published.

Proposed ordinance's title/reference: O2025-38

This Business Impact Estimate is provided in accordance with section 166.041(4), Florida Statutes. If one or more boxes are checked below, a business impact estimate is not required by state law¹ for the proposed ordinance. This Business Impact Estimate may be revised following its initial posting.

- ☐ The proposed ordinance is required for compliance with Federal or State law or regulation;
- ☐ The proposed ordinance relates to the issuance or refinancing of debt;
- ☐ The proposed ordinance relates to the adoption of budgets or budget amendments, including revenue sources necessary to fund the budget;
- ☐ The proposed ordinance is required to implement a contract or an agreement, including, but not limited to, any Federal, State, local, or private grant or other financial assistance accepted by the municipal government;
- ☐ The proposed ordinance is an emergency ordinance;
- ☐ The ordinance relates to procurement; or
- ☐ The proposed ordinance is enacted to implement the following:
 - a. Part II of Chapter 163, Florida Statutes, relating to growth policy, county and municipal planning, and land development regulation, including zoning, development orders, development agreements and development permits;
 - b. Sections 190.005 and 190.046, Florida Statutes, regarding community development districts;
 - c. Section 553.73, Florida Statutes, relating to the Florida Building Code; or
 - d. Section 633.202, Florida Statutes, relating to the Florida Fire Prevention Code.

¹ See Section 166.041(4)(c), Florida Statutes.



In accordance with the provisions of controlling law, the City of Wildwood hereby publishes the following information:

1. Summary of the proposed ordinance (must include a statement of the public purpose, such as serving the public health, safety, morals and welfare):

This proposed ordinance authorizes the renaming of Clay Drain Road / CR 156 to Mike Jacobs Sr Road at the request of the Jacobs Family Trust. The ordinance ensures continuity of public safety services by coordinating with the Sumter County 911 Coordinator for proper address updates.

2. An estimate of the direct economic impact of the proposed ordinance on private, for-profit businesses in the City of Wildwood, if any:

- (a) An estimate of direct compliance costs that businesses may reasonably incur;
- (b) Any new charge or fee imposed by the proposed ordinance or for which businesses will be financially responsible; and
- (c) An estimate of the City of Wildwood's regulatory costs, including estimated revenues from any new charges or fees to cover such costs.

As a result of this ordinance, affected businesses may incur costs associated with changing the address on their signage, business materials, licenses, corporation filings, digital materials, or other. While the exact cost that may be imposed on a business as a result of this ordinance is unquantifiable, the ordinance itself includes no compliance costs, no new charges or fees, and no regulatory costs.

3. Good faith estimate of the number of businesses likely to be impacted by the proposed ordinance:

Approximately six businesses.

4. Additional information the governing body deems useful (if any):

N/A

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: A25-1910 - SSCPA - SunKool Office

REQUESTED ACTION: The Planning and Zoning Board/Special Magistrate recommends approval of Ordinance O2025-33.

CONTRACT:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case Number	A25-1910 - SSCPA - SunKool Office
Ordinance Number	O2025-33
Owner/Applicant	Absolute of Sumter County, LLC
Property Location	The property is located at the southeast corner of the intersection of N US 301 and CR 114.
Parcel(s)	D29-050, D29-003, and D29-031
Date	8/19/2025

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 Industrial (Sumter County) to Commercial (City) for the parcels listed above on 5.60 acres MOL. This request is accompanied by a rezoning request A25-1909 RZ (O2025-34).

ANALYSIS:

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

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

Justification has been submitted to the City of Wildwood for the proposed request to change the Future Land Use from Industrial (Sumter County) to Commercial (City), as supported in the 2050 Comprehensive Plan. Policy 1.1.1.c. The proposed land use amendment would allow for the existing 3,000-square-foot residential structure to be converted for office use on 5.60 acres MOL. Policy 1.1.1.c is intended to support a mix of commercial and office uses.

(2) The proposed amendment is consistent with the goals, objectives, and policies of the comprehensive plan;

The proposed amendment is consistent with the goals, objectives, and policies of the

comprehensive plan, with the proposed land use change from Industrial (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 121,968 square feet and the development is proposing to convert the existing 3,000-square-foot single-family home into an office, 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 applicant finds 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 southeast corner of the intersection of N US 301 and CR 114. The existing office at the north end of the parcel is connected to city utilities. However, the single-family residence at the south end is not connected to utilities. Utilities are available to the site on the west side of N US 301 and to the north side of CR 114. 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 Industrial (IND) and Commercial (COM), an addition of Commercial (COM) 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 Clymer Farner Barley in March 2025. Per the survey, the likelihood of protected species is low due to the property's previous development.

(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 CR 114. The applicant has applied for a TIA Exemption which was granted by Sumter County Public Works, due to the site producing less than 50 trips per day.

Potable Water & Sewer: City water and sewer are available on the subject property. A portion of the property is serviced by city utilities. The 3,000-square-foot single-family residence to be converted to offices is not on city utilities at this time. However, prior to any development, the applicant will be required to submit a site plan and will work with the utilities department to connect to city utilities.

Schools: The commercial development will not generate any school-age children.

The applicant seeks favorable approval of Ordinance Number O2025-33.

A handwritten signature in black ink, appearing to read 'Alex Lammers', with a stylized, cursive script.

**Alex Lammers, Planner I
Development Services**

ORDINANCE NO. O2025-33

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:

Parcels D29-050, D29-003, and D29-031
Absolute of Sumter County, LLC
Acres +/- 5.60

LEGAL DESCRIPTION:

PARCEL NUMBER: D29-003

THAT PORTION OF THE NW 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, DESCRIBED AS FOLLOWS:

FROM THE NORTHWEST CORNER OF SAID SECTION 29, RUN SOUTH 89°47'30" EAST ALONG THE NORTH LINE OF THE NW 1/4 OF SECTION 29, A DISTANCE OF 62.69 FEET, MORE OR LESS, TO THE INTERSECTION WITH THE EASTERLY RIGHT-OF-WAY LINE OF U.S. HIGHWAY NO. 301; THENCE DEPARTING SAID NORTH LINE RUN SOUTH 00°18'51" EAST ALONG SAID RIGHT-OF-WAY 9.40 FEET TO THE SOUTHERLY RIGHT-OF-WAY LINE COUNTY ROAD NO. 114 (LAKE MIONA ROAD); THENCE CONTINUE SOUTH 00°18'51" EAST ALONG SAID RIGHT OF WAY 165.00 FEET TO THE POINT OF BEGINNING; THENCE DEPARTING SAID EASTERLY RIGHT-OF-WAY LINE OF U.S. HIGHWAY NO. 301, RUN SOUTH 89°47'30" EAST PARALLEL WITH SAID SOUTHERLY RIGHT-OF-WAY OF COUNTY ROAD NO. 114 AND ALONG THE SOUTH LINES OF THE LANDS DESCRIBED IN O.R. BOOK 314, PAGE 158 AND O.R. BOOK 564, PAGE 88, A DISTANCE OF 387.59 FEET TO A POINT ON THE EASTERLY LINE OF A PARCEL OF LAND DESCRIBED IN O.R. BOOK 124, PAGE 548, IN THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE SOUTH 00°20'20" EAST ALONG SAID LINE 341.00 FEET TO THE SOUTHEAST CORNER THEREOF; THENCE SOUTH 88°20'43" WEST ALONG THE NORTH LINE, AND ITS EASTERLY EXTENSION OF A PARCEL OF LAND DESCRIBED IN O.R. BOOK 124, PAGE 549, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, A DISTANCE OF 387.64 FEET TO A POINT THAT IS SOUTH 00°20'42" EAST 528.00

FEET AND SOUTH 89°47'30" EAST 62.53 FEET FROM THE ABOVE MENTIONED NORTHWEST CORNER OF SECTION 29, SAID POINT ALSO BEING ON THE EASTERLY RIGHT-OF-WAY LINE OF U.S. HIGHWAY NO. 301; THENCE RUN NORTH 00°18'51" WEST ALONG SAID LINE 353.61 FEET TO THE POINT OF BEGINNING.

LESS THAT PORTION OF ROAD RIGHT-OF-WAY FOR U.S. HIGHWAY NO. 301, AS SHOWN ON THE FLORIDA DEPARTMENT OF TRANSPORTATION, RIGHT OF WAY MAP, SECTION 18010, F.P. ID. 411257-3, SHEET 14 OF 25, PARCEL NO. 117, AND DESCRIBED IN O.R. BOOK 2054, PAGE 570, IN THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA.

PARCEL NUMBER: D29-031

FROM THE NORTHWEST CORNER OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, RUN SOUTH 0° 20' 43" EAST FOR 528.0 FEET, THENCE SOUTH 89° 47' 30" EAST TO A CONCRETE MONUMENT, 62.53 FEET, LOCATED ON THE EAST RIGHT OF WAY OF U. S. HIGHWAY NO. 301 AND THE POINT OF BEGINNING OF THIS DESCRIPTION; FROM SAID POINT OF BEGINNING, RUN NORTH 88° 24' 50" EAST 387.64 FEET, THENCE NORTH 0° 20' 20" WEST 270.72 FEET, THENCE SOUTH 87° 39' 50" EAST 127.48 FEET, THENCE SOUTH 01° 20' 10" WEST 393.14 FEET, THENCE SOUTH 89° 32' 10" WEST 84.00 FEET, THENCE SOUTH 02° 18' 34" EAST 86.13 FEET, THENCE NORTH 89° 40' 10" WEST 423.29 FEET TO THE EASTERLY RIGHT OF WAY OF U. S. HIGHWAY 301, THENCE NORTH 0° 15' 10" WEST ALONG SAID EASTERLY RIGHT OF WAY 201.20 FEET TO THE POINT OF BEGINNING.

SUBJECT TO A 10.0 FT. POWER LINE EASEMENT, LOCATED ABOUT 600 FT. SOUTH FROM LAKE MIONA HEIGHTS ROAD.

LESS AND EXCEPT THOSE LANDS AS CONVEYED IN OFFICIAL RECORDS BOOK 2061, PAGES 546 AND 553, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT A RAILROAD SPIKE WITHOUT IDENTIFICATION MARKING THE NORTHEAST CORNER OF NW 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA; THENCE RUN NORTH 89°42'49" WEST ALONG THE NORTH LINE OF SAID NW 1/4 A DISTANCE OF 2643.86 FEET TO A POINT ON THE CENTERLINE OF SURVEY OF STATE ROAD 35 (U.S. 301) AS SHOWN ON THE FLORIDA DEPARTMENT OF TRANSPORTATION RIGHT OF WAY MAP, SECTION 18010, F.P. 411257 3; THENCE DEPARTING SAID NORTH LINE SOUTH 00°28'36" EAST ALONG SAID SURVEY LINE 346.21 FEET; THENCE CONTINUING ALONG SAID SURVEY LINE SOUTH 00°08'06" WEST 391.64 FEET TO A POINT ON THE WESTERLY PROJECTION OF THE SOUTH LINE OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 1008, PAGE 327, PUBLIC RECORDS OF

SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SURVEY LINE SOUTH 89°34'49" EAST ALONG SAID PROJECTION LINE 50.39 FEET TO A POINT ON THE EASTERLY EXISTING RIGHT OF WAY LINE OF SAID STATE ROAD 35 (U.S. 301) AS SHOWN ON SAID RIGHT OF WAY MAP FOR THE POINT OF BEGINNING; THENCE NORTH 00°01'28" EAST ALONG SAID RIGHT OF WAY LINE 201.04 FEET TO A POINT ON THE NORTH LINE OF SAID LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 1008, PAGE 327; THENCE NORTH 88°32'19" EAST ALONG SAID NORTH LINE 82.03 FEET; THENCE DEPARTING SAID NORTH LINE, SOUTH 00°08'06" WEST PARALLEL WITH SAID SURVEY LINE 203.73 FEET TO A POINT ON SAID SOUTH LINE OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 1008, PAGE 327, ALSO BEING A POINT ON THE EXISTING RIGHT OF WAY LINE OF SAID STATE ROAD 35 (U.S. 301); THENCE NORTH 89°34'49" WEST ALONG SAID SOUTH LINE AND SAID EXISTING RIGHT OF WAY LINE 81.61 FEET TO THE POINT OF BEGINNING.

PARCEL NUMBER: D29-050

FROM THE NW CORNER OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA; THENCE PROCEED EASTERLY ALONG THE NORTH LINE OF THE NW 1/4 OF SAID SECTION 29 TO THE EASTERLY RIGHT-OF-WAY OF U.S. HIGHWAY #301, SAID EASTERLY RIGHT-OF-WAY 50.00 FEET MEASURED AT RIGHT ANGLES TO THE CENTERLINE OF SAID U.S. HIGHWAY #301; THENCE SOUTHERLY AND ALONG SAID EASTERLY RIGHT-OF-WAY 9.4 FEET, MORE OR LESS, TO THE SOUTHERLY RIGHT-OF-WAY OF COUNTY ROAD #114 (LAKE MIONA ROAD) FOR A POINT OF BEGINNING; THENCE CONTINUE SOUTHERLY ALONG SAID EASTERLY RIGHT-OF-WAY A DISTANCE OF 165.00 FEET; THENCE EASTERLY AND PARALLEL TO SAID SOUTHERLY RIGHT-OF-WAY OF COUNTY ROAD #114 (LAKE MIONA ROAD) A DISTANCE OF 225.00 FEET; THENCE NORTHERLY AND PARALLEL TO SAID EASTERLY RIGHT-OF-WAY OF U.S. HIGHWAY #301 A DISTANCE OF 165.00 FEET TO A POINT ON SAID SOUTHERLY RIGHT-OF-WAY OF COUNTY ROAD #114 (LAKE MIONA ROAD) SAID POINT BEING 9.4 FEET, MORE OR LESS, MEASURED AT RIGHT ANGLES FROM SAID NORTH LINE OF THE NW 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST; THENCE WESTERLY ALONG THE SOUTHERLY RIGHT-OF-WAY OF SAID COUNTY ROAD #114 (LAKE MIONA ROAD) A DISTANCE OF 225.00 FEET TO THE POINT OF BEGINNING.

LESS AND EXCEPT PORTION TAKEN FOR RIGHT OF WAY DESCRIBED AS FOLLOWS:

COMMENCE AT A RAILROAD SPIKE WITHOUT IDENTIFICATION MARKING THE NORTHEAST CORNER OF NW 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA; THENCE RUN NORTH 89°42'49" WEST ALONG THE NORTH LINE OF SAID NW 1/4 A DISTANCE OF 2643.86 FEET TO A

POINT ON THE CENTERLINE OF SURVEY OF STATE ROAD 35 (U.S. 301) AS SHOWN ON THE FLORIDA DEPARTMENT OF TRANSPORTATION RIGHT OF WAY MAP, SECTION 18010, F.P. 411257 3; THENCE DEPARTING SAID NORTH LINE SOUTH 00°28'36" EAST ALONG SAID SURVEY LINE 9.24 FEET TO A POINT ON THE WESTERLY PROJECTION OF THE SOUTH LINE OF MIONA LAKE DRIVE AS DESCRIBED IN OFFICIAL RECORDS BOOK 752, PAGE 155, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SURVEY LINE SOUTH 89°42'49"EAST ALONG SAID PROJECTION 50.00 FEET TO A POINT ON THE EASTERLY EXISTING RIGHT OF WAY LINE OF SAID STATE ROAD 35 (U.S. 301) AS SHOWN ON SAID RIGHT OF WAY MAP FOR THE POINT OF BEGINNING; THENCE CONTINUE SOUTH 89°42'49" EAST ALONG SAID SOUTH LINE OF MIONA LAKE DRIVE 82.01 FEET; THENCE DEPARTING SAID SOUTH LINE, SOUTH 00°28'36" EAST 165.02 FEET TO THE SOUTH LINE OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 752, PAGE 155. SAID PUBLIC RECORDS; THENCE NORTH 89°42'49"WEST ALONG SAID SOUTH LINE 82.01 FEET TO A POINT ON SAID EASTERLY EXISTING RIGHT OF WAY LINE OF STATE ROAD 35 (U.S. 301); THENCE NORTH 00°28'36" WEST ALONG SAID RIGHT OF WAY LINE 165.02 FEET TO THE POINT OF BEGINNING.

NEITHER THE GRANTOR NOR GRANTOR'S SPOUSE, NOR ANYONE DEPENDENT UPON SAID GRANTOR, RESIDES ON THE ABOVE DESCRIBED PROPERTY, AND THE SAME DOES NOT CONSTITUTE THE HOMESTEAD OF SAID GRANTOR AS THE SAME IS DEFINED BY THE LAWS AND THE CONSTITUTION OF THE STATE OF FLORIDA.

SUBJECT TO EASEMENTS, RESTRICTIONS AND RESERVATIONS OF RECORD, IF ANY, BUT THIS INSTRUMENT SHALL NOT OPERATE TO REIMPOSE THE SAME.

This property is to be reclassified from Industrial (Sumter County) 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 affect 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.

SECTION 5. SCRIVENER'S ERROR. The city attorney may correct scrivener's errors found in this ordinance by filing a corrected copy of this ordinance with the city clerk.

DONE AND ORDAINED this _____ day of _____, 2025, by the City Commission of the City of Wildwood, Florida.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

Ed Wolf, Mayor

ATTEST: _____
Jessica Barnes, City Clerk

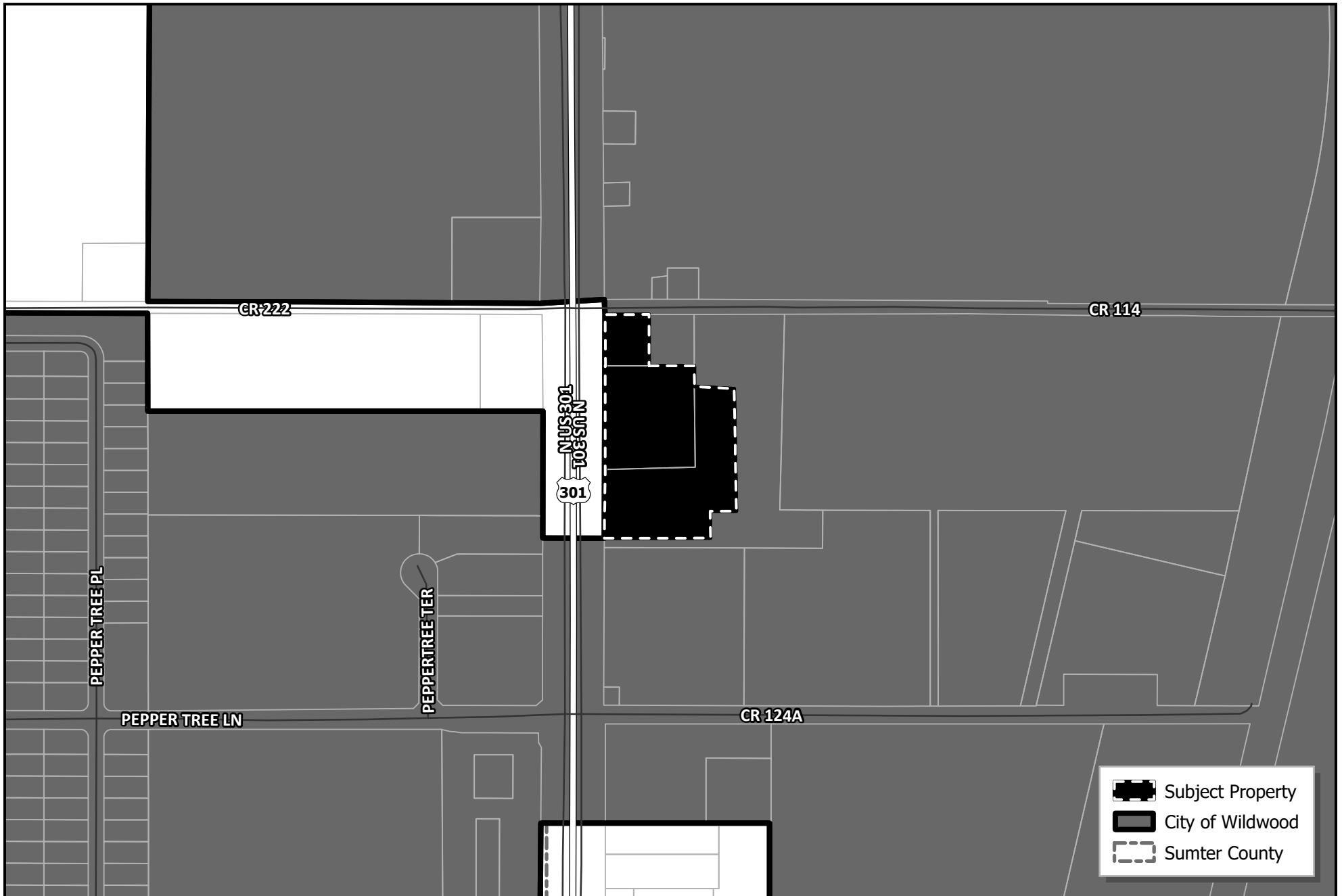
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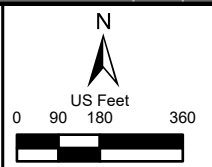
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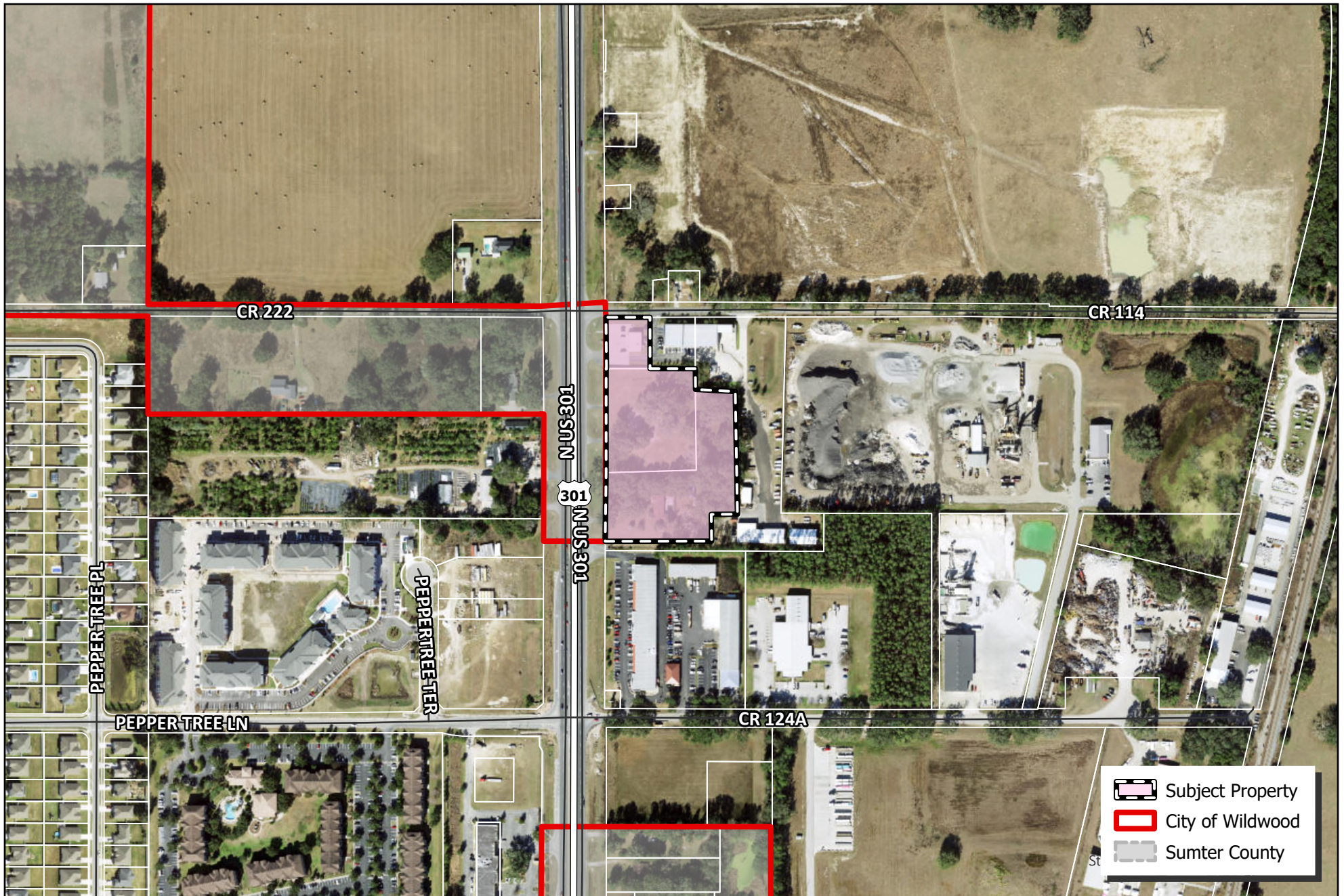
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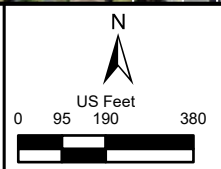
City Attorney

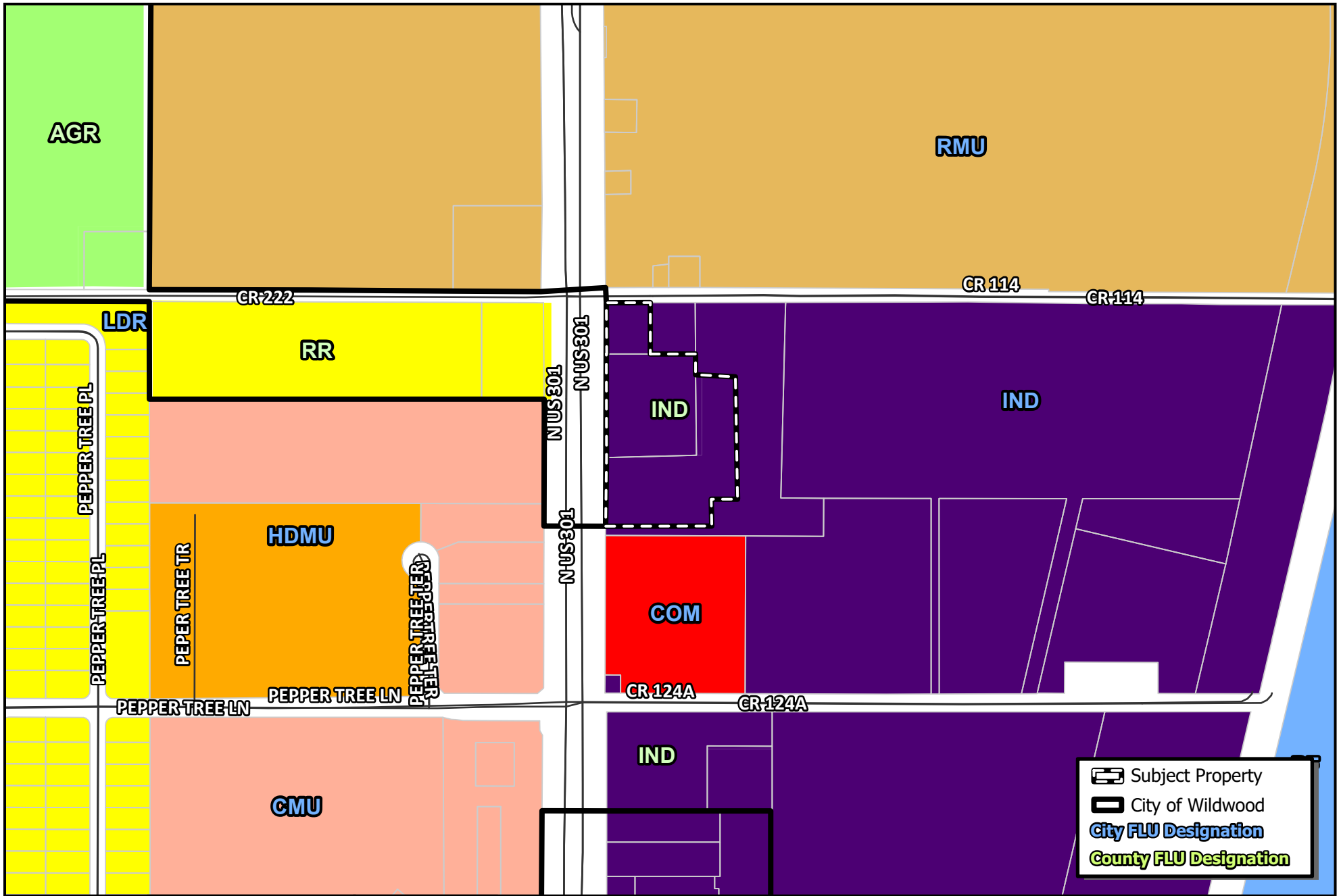
EXHIBIT A

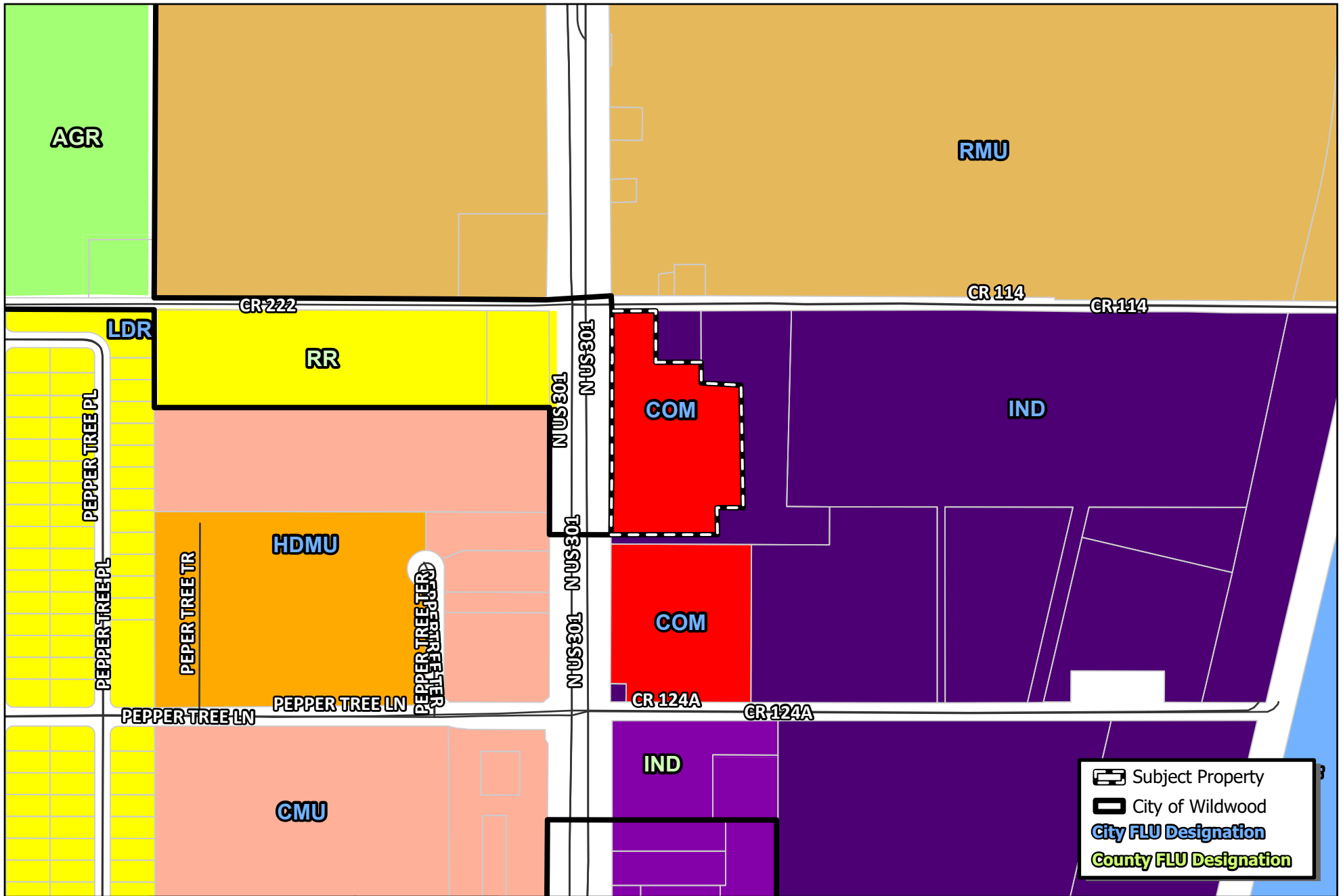


 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 US Feet 0 90 180 360	#A25-1910 SUNKOOL OFFICE PARCELS D29-003, D29-031 & D29-050	MAP 1A LOCATION MAP MAY 2025
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 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 US Feet 0 95 190 380	#A25-1910 SUNKOOL OFFICE PARCELS D29-003, D29-031 & D29-050	MAP 1B LOCATION MAP MAY 2025
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City of Wildwood, Florida
Planning & Zoning Board/Special Magistrate
as Local Planning Agency

The case below was heard on Tuesday, August 5th, 2025, 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 5.60 acres MOL. The subject property is generally located at the southeast corner of the intersection of N US 301 and CR 114.

Case Number: A25-1910 SSCPA
Owner/Applicant: Absolute of Sumter County, LLC
Parcel(s): D29-050, D29-003, and D29-031

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.

☐ recommends approval with the following conditions:

☐ recommends denial.

☐ recommends other: _____

Dated: August 5th, 2025


Lindsay C.T. Holt
Special Magistrate City of Wildwood



Business Impact Estimate

This form should be included in the agenda packet for the item under which the proposed ordinance is to be considered and must be posted on the City of Wildwood website by the time notice of the proposed ordinance is published.

Proposed ordinance's title/reference: O2025-33

This Business Impact Estimate is provided in accordance with section 166.041(4), Florida Statutes. If one or more boxes are checked below, a business impact estimate is not required by state law¹ for the proposed ordinance. This Business Impact Estimate may be revised following its initial posting.

- ☐ The proposed ordinance is required for compliance with Federal or State law or regulation;
- ☐ The proposed ordinance relates to the issuance or refinancing of debt;
- ☐ The proposed ordinance relates to the adoption of budgets or budget amendments, including revenue sources necessary to fund the budget;
- ☐ The proposed ordinance is required to implement a contract or an agreement, including, but not limited to, any Federal, State, local, or private grant or other financial assistance accepted by the municipal government;
- ☐ The proposed ordinance is an emergency ordinance;
- ☐ The ordinance relates to procurement; or
- ☒ The proposed ordinance is enacted to implement the following:
 - a. Part II of Chapter 163, Florida Statutes, relating to growth policy, county and municipal planning, and land development regulation, including zoning, development orders, development agreements and development permits;
 - b. Sections 190.005 and 190.046, Florida Statutes, regarding community development districts;
 - c. Section 553.73, Florida Statutes, relating to the Florida Building Code; or
 - d. Section 633.202, Florida Statutes, relating to the Florida Fire Prevention Code.

¹ See Section 166.041(4)(c), Florida Statutes.

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: A25-1909 - Rezoning - SunKool Office

REQUESTED ACTION: The Planning and Zoning Board/Special Magistrate recommends approval of Ordinance O2025-34.

CONTRACT:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Case Number	A25-1909 - Rezoning - SunKool Office
Ordinance Number	O2025-34
Owner/Applicant	Absolute of Sumter County, LLC
Property Location	The property is located at the southeast corner of the intersection of N US 301 and CR 114.
Parcel(s)	D29-050, D29-003, and D29-031
Date	8/15/2025

The applicant is seeking approval from the City Commission for a Zoning Map Amendment to change the zoning district from CL and RR1C (County) to C-3 (City) for the parcel listed above on 5.60 acres MOL. This request is accompanied by a concurrent Small Scale Comprehensive Plan amendment A25-1910 (O2025-33).

ANALYSIS: The applicant is proposing to convert the existing single-family residence on the south end of the property into an office.

Pursuant to Land Development Regulation (LDR) § 3.3(C)(4), the applicant 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.

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

The land use pattern of the surrounding area is commercial and industrial. 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. Therefore, no impact to Sumter County Schools will take place with the proposed zoning change.

Potable Water & Sewer: City water and sewer are available to the subject property. A portion of the property is serviced by city utilities. The 3,000-square-foot single-family residence to be converted to offices is not on city utilities at this time; however, prior to any development the applicant will be required to submit a site plan and will work with the utilities department to connect to city utilities.

Streets: The property has access off of N US 301 and CR 114. The applicant has applied for a TIA Exemption 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;

Development pressure has been increasing in the city as a result of the growth of The Villages®. A mix of development is necessary for the local community.

(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 a TIA Exemption which was granted by Sumter County Public Works, due to the site producing less than 50 trips per day.

(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	RMU-10 & M-1(City)
SOUTH	M-1 (City)
EAST	M-1 (City)
WEST	CMU (City) & RR5C (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.

The applicant seeks approval for Ordinance O2025-34, subject to the approval of O2025-33, which establishes a future land use appropriate for the proposed zoning.



**Alex Lammers, Planner I
Development Services**

ORDINANCE NO. O2025-34

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:

Parcels D29-050, D29-003, and D29-031
Absolute of Sumter County, LLC
Acres +/- 5.60

LEGAL DESCRIPTION:

PARCEL NUMBER: D29-003

THAT PORTION OF THE NW 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, DESCRIBED AS FOLLOWS:

FROM THE NORTHWEST CORNER OF SAID SECTION 29, RUN SOUTH 89°47'30" EAST ALONG THE NORTH LINE OF THE NW 1/4 OF SECTION 29, A DISTANCE OF 62.69 FEET, MORE OR LESS, TO THE INTERSECTION WITH THE EASTERLY RIGHT-OF-WAY LINE OF U.S. HIGHWAY NO. 301; THENCE DEPARTING SAID NORTH LINE RUN SOUTH 00°18'51" EAST ALONG SAID RIGHT-OF-WAY 9.40 FEET TO THE SOUTHERLY RIGHT-OF-WAY LINE COUNTY ROAD NO. 114 (LAKE MIONA ROAD); THENCE CONTINUE SOUTH 00°18'51" EAST ALONG SAID RIGHT OF WAY 165.00 FEET TO THE POINT OF BEGINNING; THENCE DEPARTING SAID EASTERLY RIGHT-OF-WAY LINE OF U.S. HIGHWAY NO. 301, RUN SOUTH 89°47'30" EAST PARALLEL WITH SAID SOUTHERLY RIGHT-OF-WAY OF COUNTY ROAD NO. 114 AND ALONG THE SOUTH LINES OF THE LANDS DESCRIBED IN O.R. BOOK 314, PAGE 158 AND O.R. BOOK 564, PAGE 88, A DISTANCE OF 387.59 FEET TO A POINT ON THE EASTERLY LINE OF A PARCEL OF LAND DESCRIBED IN O.R. BOOK 124, PAGE 548, IN THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE SOUTH 00°20'20" EAST ALONG SAID LINE 341.00 FEET TO THE SOUTHEAST CORNER THEREOF; THENCE SOUTH 88°20'43" WEST ALONG THE NORTH LINE, AND ITS EASTERLY EXTENSION OF A PARCEL OF LAND DESCRIBED IN O.R. BOOK 124, PAGE 549, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, A DISTANCE OF 387.64 FEET TO A POINT THAT IS SOUTH 00°20'42" EAST 528.00

FEET AND SOUTH 89°47'30" EAST 62.53 FEET FROM THE ABOVE MENTIONED NORTHWEST CORNER OF SECTION 29, SAID POINT ALSO BEING ON THE EASTERLY RIGHT-OF-WAY LINE OF U.S. HIGHWAY NO. 301; THENCE RUN NORTH 00°18'51" WEST ALONG SAID LINE 353.61 FEET TO THE POINT OF BEGINNING.

LESS THAT PORTION OF ROAD RIGHT-OF-WAY FOR U.S. HIGHWAY NO. 301, AS SHOWN ON THE FLORIDA DEPARTMENT OF TRANSPORTATION, RIGHT OF WAY MAP, SECTION 18010, F.P. ID. 411257-3, SHEET 14 OF 25, PARCEL NO. 117, AND DESCRIBED IN O.R. BOOK 2054, PAGE 570, IN THE PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA.

PARCEL NUMBER: D29-031

FROM THE NORTHWEST CORNER OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA, RUN SOUTH 0° 20' 43" EAST FOR 528.0 FEET, THENCE SOUTH 89° 47' 30" EAST TO A CONCRETE MONUMENT, 62.53 FEET, LOCATED ON THE EAST RIGHT OF WAY OF U. S. HIGHWAY NO. 301 AND THE POINT OF BEGINNING OF THIS DESCRIPTION; FROM SAID POINT OF BEGINNING, RUN NORTH 88° 24' 50" EAST 387.64 FEET, THENCE NORTH 0° 20' 20" WEST 270.72 FEET, THENCE SOUTH 87° 39' 50" EAST 127.48 FEET, THENCE SOUTH 01° 20' 10" WEST 393.14 FEET, THENCE SOUTH 89° 32' 10" WEST 84.00 FEET, THENCE SOUTH 02° 18' 34" EAST 86.13 FEET, THENCE NORTH 89° 40' 10" WEST 423.29 FEET TO THE EASTERLY RIGHT OF WAY OF U. S. HIGHWAY 301, THENCE NORTH 0° 15' 10" WEST ALONG SAID EASTERLY RIGHT OF WAY 201.20 FEET TO THE POINT OF BEGINNING.

SUBJECT TO A 10.0 FT. POWER LINE EASEMENT, LOCATED ABOUT 600 FT. SOUTH FROM LAKE MIONA HEIGHTS ROAD.

LESS AND EXCEPT THOSE LANDS AS CONVEYED IN OFFICIAL RECORDS BOOK 2061, PAGES 546 AND 553, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA, MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT A RAILROAD SPIKE WITHOUT IDENTIFICATION MARKING THE NORTHEAST CORNER OF NW 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA; THENCE RUN NORTH 89°42'49" WEST ALONG THE NORTH LINE OF SAID NW 1/4 A DISTANCE OF 2643.86 FEET TO A POINT ON THE CENTERLINE OF SURVEY OF STATE ROAD 35 (U.S. 301) AS SHOWN ON THE FLORIDA DEPARTMENT OF TRANSPORTATION RIGHT OF WAY MAP, SECTION 18010, F.P. 411257 3; THENCE DEPARTING SAID NORTH LINE SOUTH 00°28'36" EAST ALONG SAID SURVEY LINE 346.21 FEET; THENCE CONTINUING ALONG SAID SURVEY LINE SOUTH 00°08'06" WEST 391.64 FEET TO A POINT ON THE WESTERLY PROJECTION OF THE SOUTH LINE OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 1008, PAGE 327, PUBLIC RECORDS OF

SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SURVEY LINE SOUTH 89°34'49" EAST ALONG SAID PROJECTION LINE 50.39 FEET TO A POINT ON THE EASTERLY EXISTING RIGHT OF WAY LINE OF SAID STATE ROAD 35 (U.S. 301) AS SHOWN ON SAID RIGHT OF WAY MAP FOR THE POINT OF BEGINNING; THENCE NORTH 00°01'28" EAST ALONG SAID RIGHT OF WAY LINE 201.04 FEET TO A POINT ON THE NORTH LINE OF SAID LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 1008, PAGE 327; THENCE NORTH 88°32'19" EAST ALONG SAID NORTH LINE 82.03 FEET; THENCE DEPARTING SAID NORTH LINE, SOUTH 00°08'06" WEST PARALLEL WITH SAID SURVEY LINE 203.73 FEET TO A POINT ON SAID SOUTH LINE OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 1008, PAGE 327, ALSO BEING A POINT ON THE EXISTING RIGHT OF WAY LINE OF SAID STATE ROAD 35 (U.S. 301); THENCE NORTH 89°34'49" WEST ALONG SAID SOUTH LINE AND SAID EXISTING RIGHT OF WAY LINE 81.61 FEET TO THE POINT OF BEGINNING.

PARCEL NUMBER: D29-050

FROM THE NW CORNER OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA; THENCE PROCEED EASTERLY ALONG THE NORTH LINE OF THE NW 1/4 OF SAID SECTION 29 TO THE EASTERLY RIGHT-OF-WAY OF U.S. HIGHWAY #301, SAID EASTERLY RIGHT-OF-WAY 50.00 FEET MEASURED AT RIGHT ANGLES TO THE CENTERLINE OF SAID U.S. HIGHWAY #301; THENCE SOUTHERLY AND ALONG SAID EASTERLY RIGHT-OF-WAY 9.4 FEET, MORE OR LESS, TO THE SOUTHERLY RIGHT-OF-WAY OF COUNTY ROAD #114 (LAKE MIONA ROAD) FOR A POINT OF BEGINNING; THENCE CONTINUE SOUTHERLY ALONG SAID EASTERLY RIGHT-OF-WAY A DISTANCE OF 165.00 FEET; THENCE EASTERLY AND PARALLEL TO SAID SOUTHERLY RIGHT-OF-WAY OF COUNTY ROAD #114 (LAKE MIONA ROAD) A DISTANCE OF 225.00 FEET; THENCE NORTHERLY AND PARALLEL TO SAID EASTERLY RIGHT-OF-WAY OF U.S. HIGHWAY #301 A DISTANCE OF 165.00 FEET TO A POINT ON SAID SOUTHERLY RIGHT-OF-WAY OF COUNTY ROAD #114 (LAKE MIONA ROAD) SAID POINT BEING 9.4 FEET, MORE OR LESS, MEASURED AT RIGHT ANGLES FROM SAID NORTH LINE OF THE NW 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST; THENCE WESTERLY ALONG THE SOUTHERLY RIGHT-OF-WAY OF SAID COUNTY ROAD #114 (LAKE MIONA ROAD) A DISTANCE OF 225.00 FEET TO THE POINT OF BEGINNING.

LESS AND EXCEPT PORTION TAKEN FOR RIGHT OF WAY DESCRIBED AS FOLLOWS:

COMMENCE AT A RAILROAD SPIKE WITHOUT IDENTIFICATION MARKING THE NORTHEAST CORNER OF NW 1/4 OF SECTION 29, TOWNSHIP 18 SOUTH, RANGE 23 EAST, SUMTER COUNTY, FLORIDA; THENCE RUN NORTH 89°42'49" WEST ALONG THE NORTH LINE OF SAID NW 1/4 A DISTANCE OF 2643.86 FEET TO A

POINT ON THE CENTERLINE OF SURVEY OF STATE ROAD 35 (U.S. 301) AS SHOWN ON THE FLORIDA DEPARTMENT OF TRANSPORTATION RIGHT OF WAY MAP, SECTION 18010, F.P. 411257 3; THENCE DEPARTING SAID NORTH LINE SOUTH 00°28'36" EAST ALONG SAID SURVEY LINE 9.24 FEET TO A POINT ON THE WESTERLY PROJECTION OF THE SOUTH LINE OF MIONA LAKE DRIVE AS DESCRIBED IN OFFICIAL RECORDS BOOK 752, PAGE 155, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE DEPARTING SAID SURVEY LINE SOUTH 89°42'49"EAST ALONG SAID PROJECTION 50.00 FEET TO A POINT ON THE EASTERLY EXISTING RIGHT OF WAY LINE OF SAID STATE ROAD 35 (U.S. 301) AS SHOWN ON SAID RIGHT OF WAY MAP FOR THE POINT OF BEGINNING; THENCE CONTINUE SOUTH 89°42'49" EAST ALONG SAID SOUTH LINE OF MIONA LAKE DRIVE 82.01 FEET; THENCE DEPARTING SAID SOUTH LINE, SOUTH 00°28'36" EAST 165.02 FEET TO THE SOUTH LINE OF LANDS DESCRIBED IN OFFICIAL RECORDS BOOK 752, PAGE 155. SAID PUBLIC RECORDS; THENCE NORTH 89°42'49"WEST ALONG SAID SOUTH LINE 82.01 FEET TO A POINT ON SAID EASTERLY EXISTING RIGHT OF WAY LINE OF STATE ROAD 35 (U.S. 301); THENCE NORTH 00°28'36" WEST ALONG SAID RIGHT OF WAY LINE 165.02 FEET TO THE POINT OF BEGINNING.

NEITHER THE GRANTOR NOR GRANTOR'S SPOUSE, NOR ANYONE DEPENDENT UPON SAID GRANTOR, RESIDES ON THE ABOVE DESCRIBED PROPERTY, AND THE SAME DOES NOT CONSTITUTE THE HOMESTEAD OF SAID GRANTOR AS THE SAME IS DEFINED BY THE LAWS AND THE CONSTITUTION OF THE STATE OF FLORIDA.

SUBJECT TO EASEMENTS, RESTRICTIONS AND RESERVATIONS OF RECORD, IF ANY, BUT THIS INSTRUMENT SHALL NOT OPERATE TO REIMPOSE THE SAME.

This property is to be reclassified from CL and RR1C (Sumter County) 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 affect 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.

SECTION 5. SCRIVENER'S ERROR. The city attorney may correct scrivener's errors found in this ordinance by filing a corrected copy of this ordinance with the city clerk.

DONE AND ORDAINED this _____ day of _____, 2025, by the City Commission of the City of Wildwood, Florida.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

Ed Wolf, Mayor

ATTEST: _____
Jessica Barnes, City Clerk

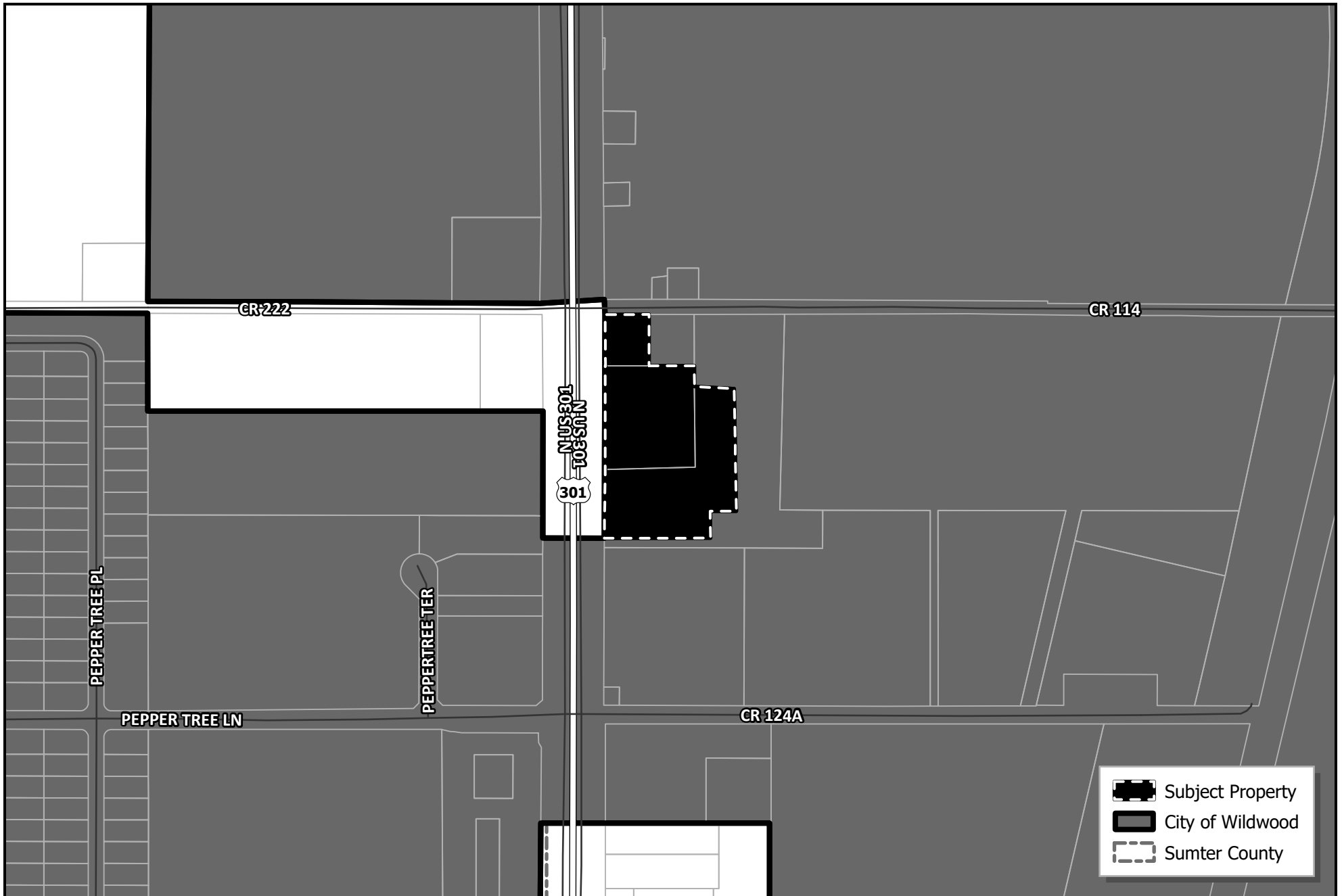
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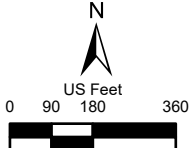
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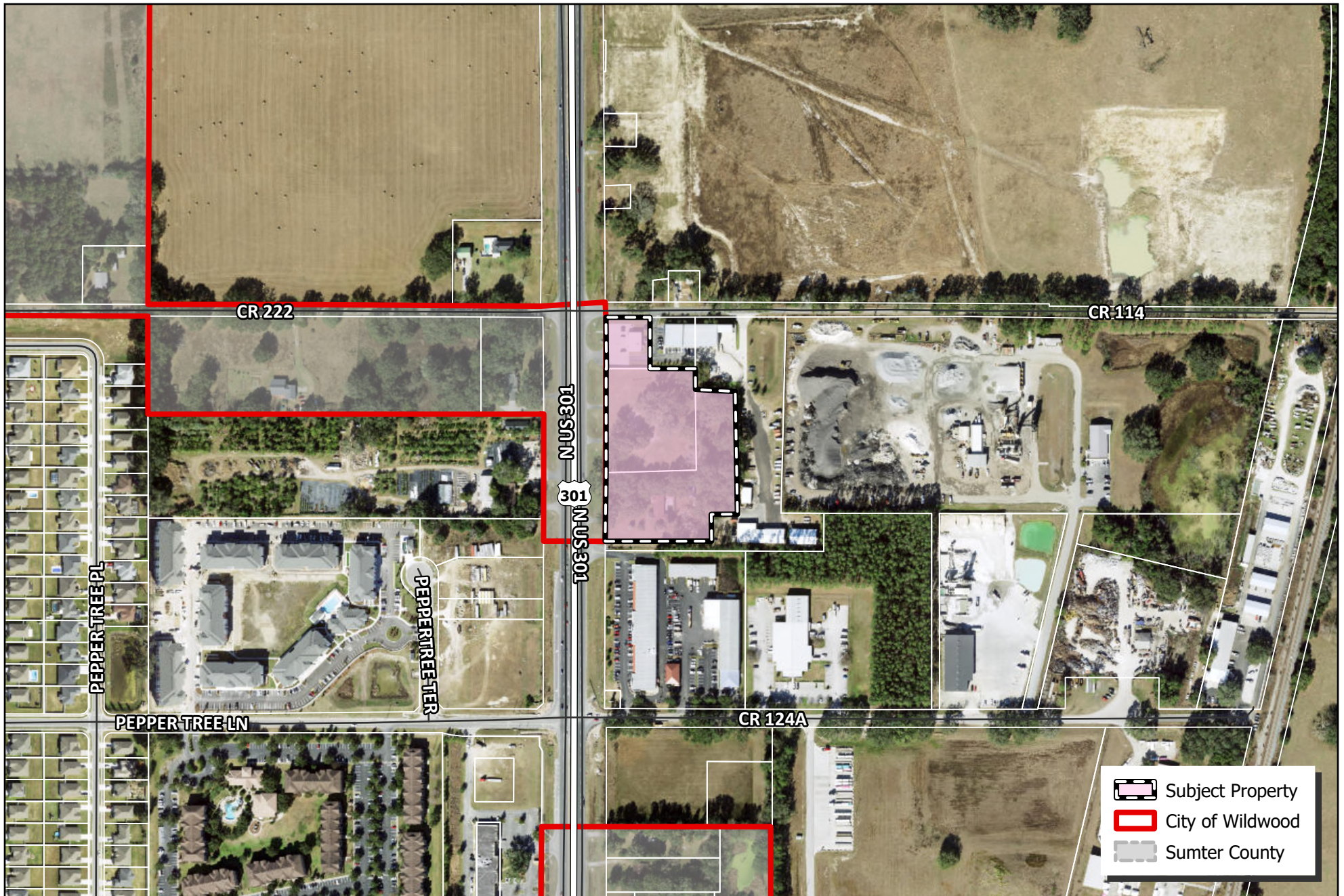
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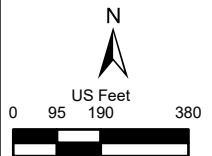
City Attorney

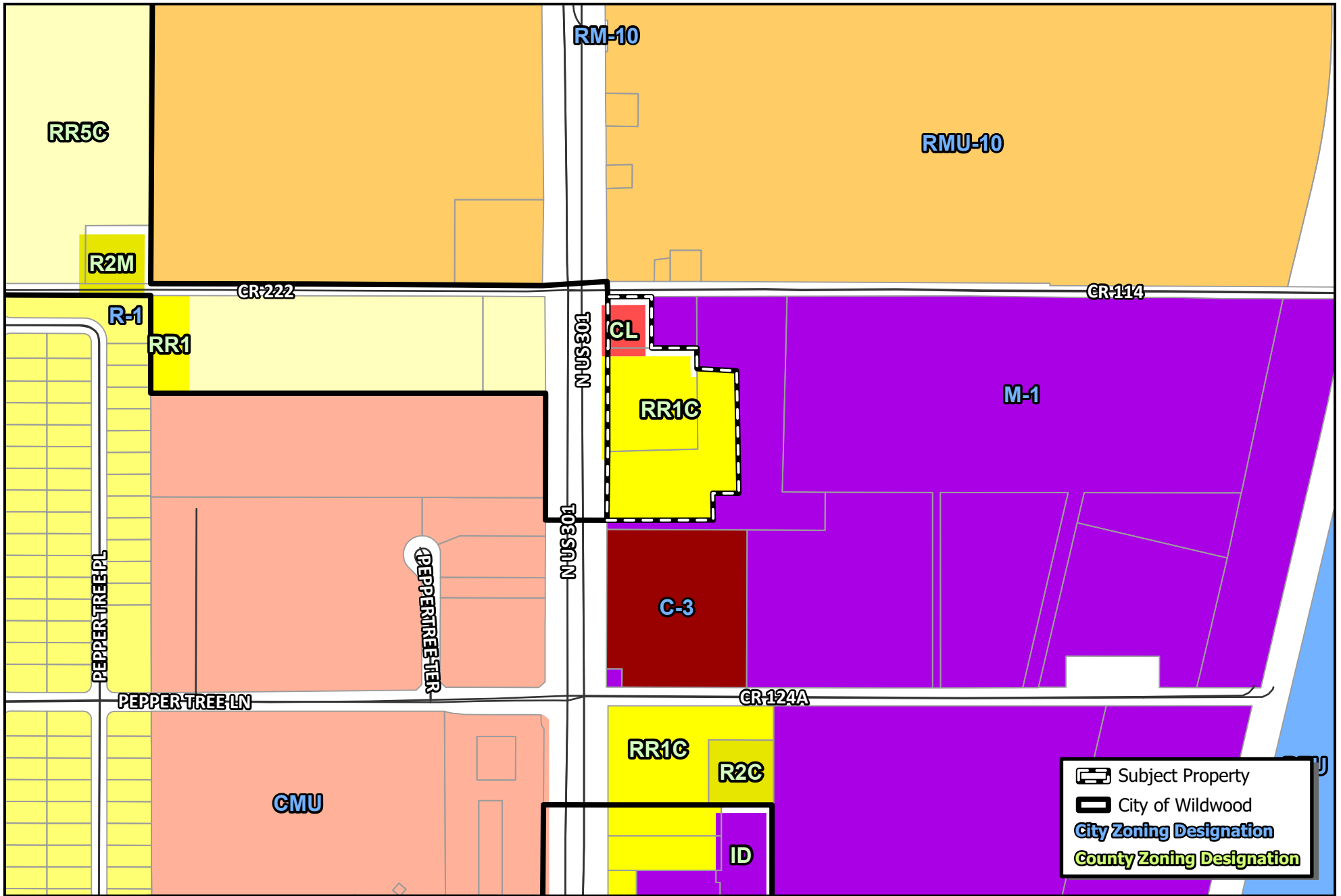
EXHIBIT A

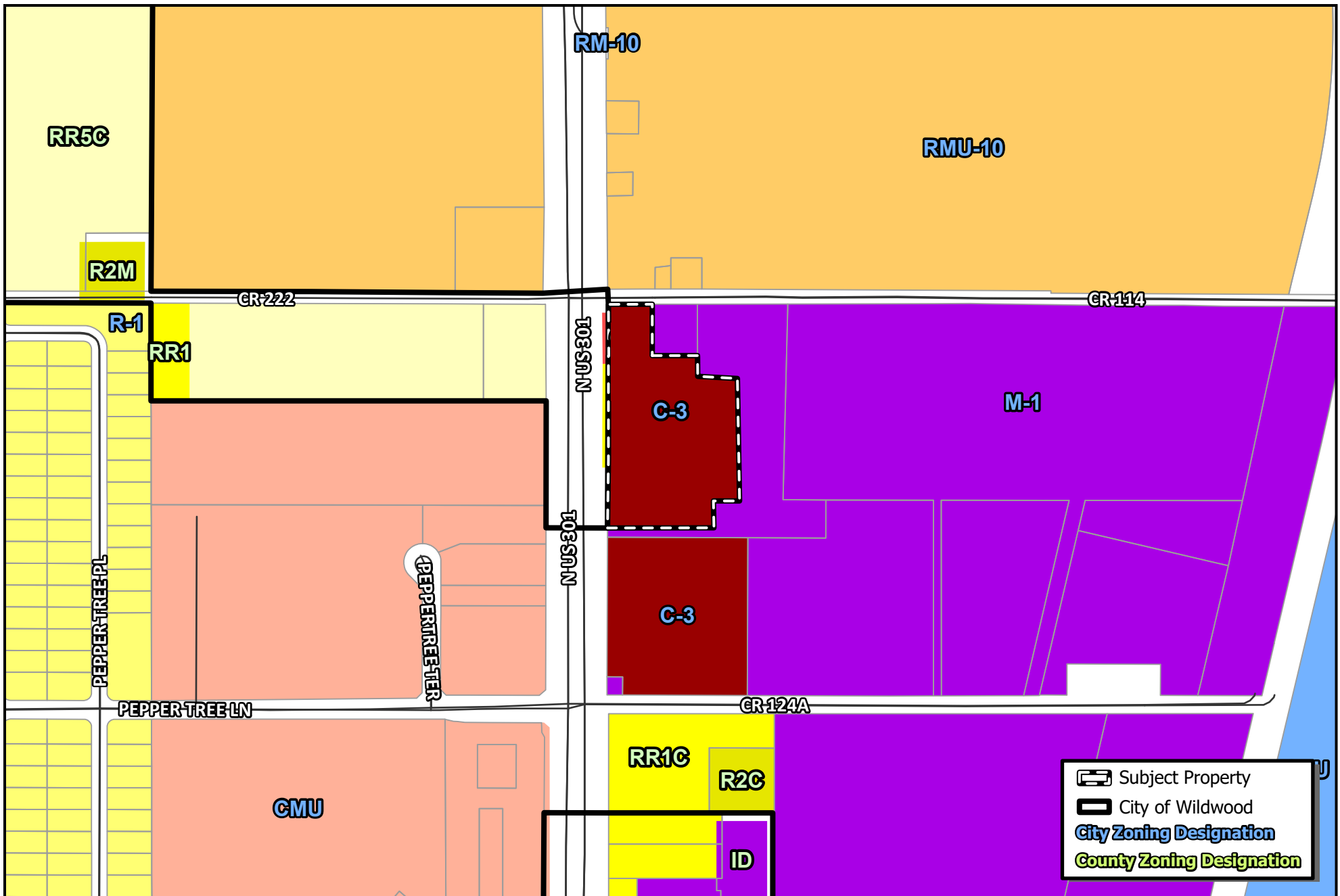


 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 US Feet 0 90 180 360	#A25-1909 SUNKOOL OFFICE PARCELS D29-003, D29-031 & D29-050	MAP 1A
				LOCATION MAP
				MAY 2025



 WILDWOOD FLORIDA	CITY OF WILDWOOD 100 North Main Street Wildwood, FL 34785 Phone: (352) 330-1330 www.wildwood-fl.gov	 US Feet 0 95 190 380	#A25-1909 SUNKOOL OFFICE PARCELS D29-003, D29-031 & D29-050	MAP 1B
				LOCATION MAP
				MAY 2025





Subject Property
 City of Wildwood
City Zoning Designation
County Zoning Designation

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

The case below was heard on Tuesday, August 5, 2025 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 and CL (Sumter County) to C-3 (City) on 5.60 acres MOL. The subject property is generally located at the southeast corner of the intersection of N US 301 and CR 114.

Case Number: A25-1909 RZ
Owner/Applicant: Absolute of Sumter County, LLC
Parcel(s): D29-050, D29-003, and D29-031

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 § 3.3(C)(4), the Special Magistrate

☒ recommends approval.

☐ recommends approval with the following conditions:

☐ recommends denial.

Dated: August 5, 2025


Lindsay C.T. Holt
Special Magistrate City of Wildwood



Business Impact Estimate

This form should be included in the agenda packet for the item under which the proposed ordinance is to be considered and must be posted on the City of Wildwood website by the time notice of the proposed ordinance is published.

Proposed ordinance's title/reference: O2025-34

This Business Impact Estimate is provided in accordance with section 166.041(4), Florida Statutes. If one or more boxes are checked below, a business impact estimate is not required by state law¹ for the proposed ordinance. This Business Impact Estimate may be revised following its initial posting.

- ☐ The proposed ordinance is required for compliance with Federal or State law or regulation;
- ☐ The proposed ordinance relates to the issuance or refinancing of debt;
- ☐ The proposed ordinance relates to the adoption of budgets or budget amendments, including revenue sources necessary to fund the budget;
- ☐ The proposed ordinance is required to implement a contract or an agreement, including, but not limited to, any Federal, State, local, or private grant or other financial assistance accepted by the municipal government;
- ☐ The proposed ordinance is an emergency ordinance;
- ☐ The ordinance relates to procurement; or
- ☒ The proposed ordinance is enacted to implement the following:
 - a. Part II of Chapter 163, Florida Statutes, relating to growth policy, county and municipal planning, and land development regulation, including zoning, development orders, development agreements and development permits;
 - b. Sections 190.005 and 190.046, Florida Statutes, regarding community development districts;
 - c. Section 553.73, Florida Statutes, relating to the Florida Building Code; or
 - d. Section 633.202, Florida Statutes, relating to the Florida Fire Prevention Code.

¹ See Section 166.041(4)(c), Florida Statutes.

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: Approval of Fifth Amendment to City of Wildwood - Waste Management Contract

REQUESTED ACTION: Staff recommends approval.

CONTRACT: Vendor/Entity: Waste Management
Effective Date: 10/01/25 Termination Date: 10/01/29 Unless extended
Managing Division/Department: Executive

BUDGET IMPACT: No budget impact. Fees are passed along to residents and businesses.

HISTORY/FACTS/ISSUES:

The City has a contract with Waste Management to provide solid waste and recycling services. Waste Management has requested a fifth amendment to the agreement. The proposed amendment clarifies section 4.D. regarding exclusive rights pertaining to construction debris management. It also updates the service rates for FY26, including a new rate for vertical compactors. The City has had an exceptional working relationship with Waste Management since the company took over the municipal solid waste services from the City.

ORDINANCE NUMBER O2025-41

AN ORDINANCE OF THE CITY OF WILDWOOD, FLORIDA; ADOPTING AND APPROVING THE FIFTH AMENDMENT TO CONTRACT FOR SOLID WASTE AND RECYCLING SERVICES; AMENDING SECTION 4.D. EXCLUSIVE RIGHTS; AMENDING EXHIBIT "A" (CITY OF WILDWOOD RATES EFFECTIVE 10/01/25 THROUGH 09/30/26); PROVIDING FINDINGS AND INTENT; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE.

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

SECTION 1. FINDINGS AND INTENT. The City Commission makes the following findings and intent:

(1) The City of Wildwood, Florida (hereafter "City") exercises control over all publicly dedicated rights-of-way, streets, alleys, bridges, easements and other public places located within the limits of the City.

(2) The City entered into the Contract for Solid Waste and Recycling Services on October 10, 2010 ("Waste Management Contract") with Waste Management Inc. of Florida.

(3) The City and Waste Management have previously entered into a First, Second, Third, and Fourth Amendment to the Waste Management Contract.

(4) The City and Waste Management have agreed to additional changes to the Waste Management Contract.

(5) The changes and modifications to the Waste Management Contract are in the best interest of the City and its residents.

SECTION 2. AMENDMENT. The Waste Management Contract is amended as set forth in the attached Exhibit "1" – Fifth Amendment to Contract for Solid Waste and Recycling Services.

SECTION 3. Except as amended on the attached Exhibit "1", the Contract for Solid Waste and Recycling Services shall remain unchanged and in full force and effect.

SECTION 4. SEVERABILITY. Should any section or provision of the Fifth Amendment to Contract for Solid Waste and Recycling Services or any portion thereof, the deletion of which would not adversely affect (in the general sense) the receipt of any material benefits or, substantially increase the burden of any party hereunder, be declared by a judicial or administrative tribunal of competent jurisdiction to be invalid, such decision shall not affect the validity of the remainder of said Amendment, as a whole or any part thereof, other than the part declared to be invalid. In the event of any such partial invalidity, the City and Franchisee shall meet and negotiate in good faith to obtain a replacement provision that is in compliance with the judicial or administrative authority's decisions and consistent with the original intent of the parties as contained herein.

SECTION 5. EFFECTIVE DATE. This Ordinance shall take effect immediately upon adoption and execution of the attached Exhibit "1" by the parties.

DONE AND ORDAINED this _____ day of September, 2025, by the City Commission of the City of Wildwood, Florida.

**CITY COMMISSION
CITY OF WILDWOOD, FLORIDA**

Ed Wolf, Mayor

ATTEST: _____
Jessica Barnes, City Clerk

First Reading: _____

Second Reading: _____

Approved as to form:

City Attorney

EXHIBIT “1”

Exhibit "A"

City of Wildwood Rates Effective 10/01/25 through 09/30/26

Container Size (Dumpster)	Extra Dump	1 Dumps Per week	2 Dumps Per week	3 Dumps Per week	4 Dumps Per week	5 Dumps Per week	6 Dumps Per week
2 cubic yds	\$44.59	\$66.81	\$133.63	\$200.44	\$267.26	\$334.07	\$400.89
Total Rate	\$44.59	\$66.81	\$133.63	\$200.44	\$267.26	\$334.07	\$400.89
3 cubic yds	\$66.89	\$100.22	\$200.44	\$300.67	\$400.89	\$501.11	\$601.33
Total Rate	\$66.89	\$100.22	\$200.44	\$300.67	\$400.89	\$501.11	\$601.33
4 cubic yds	\$89.20	\$133.63	\$267.26	\$400.89	\$534.52	\$668.15	\$801.78
Total Rate	\$89.20	\$133.63	\$267.26	\$400.89	\$534.52	\$668.15	\$801.78
6 cubic yds	\$133.79	\$200.44	\$400.89	\$601.33	\$801.78	\$1,002.22	\$1,202.66
Total Rate	\$133.79	\$200.44	\$400.89	\$601.33	\$801.78	\$1,002.22	\$1,202.66
8 cubic yds	\$178.39	\$267.26	\$534.52	\$801.78	\$1,069.04	\$1,336.30	\$1,603.56
Total Rate	\$178.39	\$267.26	\$534.52	\$801.78	\$1,069.04	\$1,336.30	\$1,603.56
Container Size Vertical Comp	Extra Dump	1 Dumps Per week	2 Dumps Per week	3 Dumps Per week	4 Dumps Per week	5 Dumps Per week	6 Dumps Per week
2 cubic yds	\$107.67	\$161.31	\$322.62	\$483.93	\$645.24	\$806.55	\$967.86
Total Rate	\$107.67	\$161.31	\$322.62	\$483.93	\$645.24	\$806.55	\$967.86
3 cubic yds	\$161.50	\$241.96	\$483.93	\$725.89	\$967.86	\$1,209.82	\$1,451.79
Total Rate	\$161.50	\$241.96	\$483.93	\$725.89	\$967.86	\$1,209.82	\$1,451.79
4 cubic yds	\$215.34	\$322.62	\$645.24	\$967.86	\$1,290.48	\$1,613.10	\$1,935.72
Total Rate	\$215.34	\$322.62	\$645.24	\$967.86	\$1,290.48	\$1,613.10	\$1,935.72
6 cubic yds	\$323.01	\$483.93	\$967.86	\$1,451.79	\$1,935.72	\$2,419.65	\$2,903.58
Total Rate	\$323.01	\$483.93	\$967.86	\$1,451.79	\$1,935.72	\$2,419.65	\$2,903.58
8 cubic yds	\$430.68	\$645.24	\$1,290.48	\$1,935.72	\$2,580.96	\$3,226.20	\$3,871.43
Total Rate	\$430.68	\$645.24	\$1,290.48	\$1,935.72	\$2,580.96	\$3,226.20	\$3,871.43
Container Size	Per Pull Charges on Open Top Containers						
Roll-Offs	Total Rate						
20 yd	\$ 257.50	\$ 257.50	plus tipping fees				
30 yd	\$ 280.23	\$ 280.23	plus tipping fees				
40 yd	\$ 302.95	\$ 302.95	plus tipping fees				

Compactor Size Rolloff	Per Pull Charges		
	Total Rate		
20 yd	\$ 371.10	\$ 371.10	plus tipping fees
30 yd	\$ 446.79	\$ 446.79	plus tipping fees
34 yd	\$ 485.51	\$ 485.51	plus tipping fees
35 yd	\$ 499.79	\$ 499.79	plus tipping fees
40 yd	\$ 560.37	\$ 560.37	plus tipping fees

Service Type	1st Cart Monthly	Limb Debris Pickup/Disposal	Monthly Fee	2nd Cart Monthly	3rd Cart Monthly
Residential/ Inside City	\$19.27	\$3.53	\$22.80	\$13.68	\$13.68
Fuel Surcharge	\$0.00		\$0.00	\$0.00	\$0.00
Total Rate	\$19.27	\$3.53	\$22.80	\$13.68	\$13.68
Residential/ Outside City	\$28.73	NA	\$28.73	\$17.47	\$17.47
Fuel Surcharge	\$0.00		\$0.00	\$0.00	\$0.00
Total Rate	\$28.73	\$0.00	\$28.73	\$17.47	\$17.47
Commercial/ Inside City	\$29.14	\$9.46	\$29.14	\$13.68	\$13.68
Fuel Surcharge	\$0.00	per CY	+\$9.46 per CY	\$0.00	\$0.00
Total Rate	\$29.14	\$9.46	\$29.14	\$13.68	\$13.68
Commercial/ Outside City	\$36.25	\$ 11.89	\$36.25	\$17.47	\$17.47
Fuel Surcharge	\$0.00	per CY	+\$11.34 per CY	\$0.00	\$0.00
Total Rate	\$36.25	\$11.89	\$36.25	\$17.47	\$17.47

Consumer Price Index for All Urban Consumers (CPI-U)
Original Data Value

For the City of Wildwood

Series Id: CUUR0000SEHG02,CUUS0000SEHG02

Not Seasonally Adjusted

Series Title: Garbage and trash collection in U.S. city average, all urban consumers, not seasonally adjusted

Area: U.S. city average

Item: Garbage and trash collection

Base Period: DECEMBER 1983=100

Years: 2015 to 2025

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	HALF1	HALF2	HALF2
2015	427.734	429.248	429.235	429.807	431.234	430.813	431.229	432.967	433.843	434.829	436.428	436.996			232.635
2016	437.205	438.296	437.699	437.676	438.317	437.858	438.607	439.358	439.707	440.311	443.343	444.745			236.336
2017	446.266	447.699	446.987	447.129	447.272	448.046	448.328	448.717	449.008	452.196	453.820	453.596			239.745
2018	453.354	454.915	455.230	458.722	462.887	465.041	465.579	470.457	471.026	472.535	486.650	485.935	458.358	475.364	244.166
2019	475.687	477.474	478.569	479.449	480.865	480.984	482.138	483.987	484.346	486.133	486.485	486.708	478.838	484.966	248.830
2020	491.003	494.429	495.288	494.432	494.946	496.679	498.564	500.882	501.756	503.315	504.970	508.190	494.463	502.946	254.176
2021	512.722	517.270	518.505	518.579	516.440	517.202	521.185	524.408	529.934	530.114	529.053	532.538	516.786	527.872	267.232
2022	533.078	538.313	540.719	542.564	544.546	547.554	548.187	548.706	558.254	561.090	563.816	565.185	541.129	557.540	287.180
2023	570.412	575.697	576.773	580.124	587.431	589.812	596.167	597.347	596.997	597.569	601.631	602.164	580.042	598.646	299.880
2024	606.773	610.551	610.015	611.073	609.538	611.946	614.089	615.880	619.640	621.632	627.127	627.807	609.983	621.029	308.271
2025	629.803	641.938	642.053	643.063	646.507										

Index Change = 31.990

CPI Change = 5.24%

2%<=CPI<=6% 5.24%

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: Resolution to Adopt the Stantec Impact Fee Study

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

The attached resolution formally adopts the Impact Fee Study completed by Stantec on August 19, 2025. Upon adoption of this resolution, updated impact fees consistent with the findings and recommendations of the Stantec report will be brought to the City Commission for public hearing and to consider implementing the new fees pursuant to Section 163.31801, Florida Statutes.

RESOLUTION NO. R2025-29

A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF WILDWOOD, FLORIDA; ADOPTING THE LAW ENFORCEMENT, PARKS AND RECREATION, AND WATER AND SEWER IMPACT FEE STUDY COMPLETED BY STANTEC; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City of Wildwood ("City") is a provider of law enforcement, parks and recreation, water, sewer and other municipal services to residents, businesses, and property owners within the municipal limits; and,

WHEREAS, the City assesses Law Enforcement, Parks and Recreation, Water, and Sewer impact fees on certain new development to mitigate the impacts of new development on existing taxpayers in accordance with Florida law; and,

WHEREAS, the City engaged Stantec to perform a new impact fee study to update the Law Enforcement, Parks and Recreation, and Water and Sewer Impact Fees in accordance with Florida law; and,

WHEREAS, Stantec submitted its report to the City titled "Impact Fee Study: Law Enforcement, Parks, and Water & Sewer" dated August 19, 2025; and,

WHEREAS, the City finds it is in the best interest of the public to adopt the Law Enforcement, Parks and Recreation, and Water and Sewer Impact Fee study completed by Stantec; and,

WHEREAS, the City intends to propose an ordinance and hold a public hearing updating its impact fees.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COMMISSION OF THE CITY OF WILDWOOD, FLORIDA, THAT:

SECTION 1. The foregoing recitals are deemed true and material parts of this Resolution and are fully incorporated herein by reference.

SECTION 2. This Resolution formally adopts the Impact Fee Study titled "Impact Fee Study: Law Enforcement, Parks, and Water & Sewer" dated August 19, 2025.

SECTION 3. Upon adoption of this Resolution, updated Impact Fees consistent with the findings and recommendations of the Stantec report will be brought to the City Commission for public hearing and to consider implementing the new fees pursuant to Section 163.31801, Florida Statutes.

SECTION 4. The City Manager is hereby authorized to initiate the process.

SECTION 5. Effective Date. This Resolution shall become effective immediately upon passage and adoption by City Commission.

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: _____
Jessica Barnes, City Clerk



City of Wildwood, FL

Impact Fee Study: Law Enforcement, Park, and Water & Sewer

August 19, 2025





August 19, 2025

Jason McHugh
City Manager
100 N Main St
Wildwood, Florida 34785

Re: Law Enforcement and Park
Impact Fees, and Water &
Sewer System Development
Charges Study –Final Report

Dear Mr. McHugh,

Stantec Consulting Services Inc. is pleased to present this Final Report of the Law Enforcement Impact Fees, & Park Impact Fees and Water & Sewer System Development Charges Study performed for the City of Wildwood, Florida. We appreciate the fine assistance provided by you and all the members of the City staff who participated in the Study.

If you or others at the City have any questions, please do not hesitate to call me at (904) 671-0117 or email me at peter.napoli@stantec.com.

A handwritten signature in black ink, appearing to read "Peter Napoli".

Sincerely,

Peter Napoli
Manager

777 S Harbour Island Boulevard Suite 600
Tampa FL 33602-5729
(904) 671-0117
peter.napoli@stantec.com

Enclosure

IMPACT FEES STUDY

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IMPACT FEES STUDY

Introduction

1. INTRODUCTION

Stantec Consulting Services Inc. (Stantec) was retained by the City of Wildwood, Florida (hereafter referred to as the “City”) to conduct an Impact Fee Study (Study). This report presents the results of the Study, including background information, legal considerations, an explanation of the calculation methodology employed, results of the analysis, as well as comparative impact fee surveys.

The principal objectives or components of the Study are as follows:

Law Enforcement Impact Fee – Identify the appropriate methodology for and associated calculation of updated law enforcement impact fees for new residential units and businesses.

Park Impact Fee – Identify the appropriate methodology for and associated calculation of an updated park impact fee applicable to new residential units.

Utility System Development Charges (SDCs) – Identify the appropriate methodology for and associated calculation of updated water and sewer system development charges.

1.1 BACKGROUND

Impact fees are assessed against new development to recover the cost of providing capital facilities (infrastructure) needed to serve new development. Such charges are the mechanism by which new growth can “pay its own way” and minimize the extent to which existing residents must bear the cost of new or expanded facilities, which are necessary to serve new development. Impact fees are capital cost recovery fees and are often referred to as connection fees, capacity fees, and system development charges. For the purposes of this report and analysis, the term system development charges refers to water and sewer fees, while impact fees are associated with law enforcement and parks.

If impact fees are not assessed, either:

1. The facilities and capital equipment to serve new growth will not be constructed or acquired, and the level of service provided to current properties will degrade as growth occurs; or
2. The facilities and equipment to serve new growth will be constructed or acquired but will be funded mostly by current properties for the benefit of new growth.

The City currently charges impact fees for law enforcement, parks, and water & sewer. The current law enforcement and park impact fees were adopted in 2021, and the current water & sewer system development charges were adopted in 2017. It is recommended that impact fees be updated approximately



IMPACT FEES STUDY

Introduction

every four years to accurately reflect changes in a City's property mix, cost of facilities and equipment, and level of service. As such, the City requested that Stantec update its existing fees with the most current data available. The current fees charged by the City are summarized in Table 1 below.

Table 1 - Current Impact Fees

	Current Residential Fee	Current Non-Residential Fee
Law Enforcement	\$271.42 Per Equivalent Dwelling Unit	\$0.19 per Square Foot
Parks	\$366.30 Per Equivalent Dwelling Unit	Not Applicable
Water SDC	\$1,888.00 Per Equivalent Residential Unit	\$1,888.00 Per Equivalent Residential Unit
Sewer SDC	\$3,298.00 Per Equivalent Residential Unit	\$3,298.00 Per Equivalent Residential Unit

1.2 LEGAL CONSIDERATIONS

Many of the legal precedents and requirements for impact fees in Florida date back to a Florida Supreme Court decision in the case of the Contractors and Builders Association of Pinellas County versus the City of Dunedin, Florida. This case identified certain conditions to support a valid impact fee that were ultimately embodied in statutory guidelines enacted by the Growth Management Legislation passed in 1985. These legal standards require that impact fees must 1) bear a reasonable relationship to the benefit received by those who pay it, 2) must not exceed the proportional share of the cost of new facilities or services needed to serve new development and must include credits for contributions the development will make toward that cost, and 3) must be earmarked and expended in such a way as to ensure that those paying the fee receive benefit from that payment.

Also, in 2006 Florida Legislature passed Senate Bill 1194 that created Section 163.31801, Florida Statutes, which has also come to be known as the "Florida Impact Fee Act". This legislation outlined additional requirements regarding the calculation of and accounting for impact fees. Most notably, this legislation requires 1) that the calculation of impact fees be based upon the most recent, localized data, 2) separate reporting/accounting of impact fee revenues and expenditures in a distinct fund, 3) that the administrative charges collected in impact fees be based upon actual costs, and 4) that 90 days' notice be given prior to the effective date of an ordinance imposing or amending an impact fee.

In summary, the courts and subsequent legislation have addressed three areas associated with the development of impact fees. These areas include: 1) "fair share" allocation rules dealing with payment of impact fees by the affected property owners, 2) "rational nexus" standards, which focus on the expenditure or purpose of impact fees, and 3) "credit" allowances, which recognize offsets in the calculation of impact fees.



IMPACT FEES STUDY

Introduction

The “fair share” allocation rules require that an impact fee only be used for capital expenditures that are attributable to new growth. Additionally, the “fair share” allocation rules recognize that the cost of facilities used by both existing customers and new development must be apportioned between the two user groups, such that the user groups are treated equally, and one group does not subsidize the other.

The “rational nexus” standards require that there is a reasonable relationship between the need for capital facilities and the benefits received by new customers for which the impact fee will be expended.

There are two conditions that limit where and when impact fees can be collected and used. With respect to the first condition, although there is no specific limit as to distance between an applicant paying the impact fee and the capital expenditure to be constructed by the fee, there should be a general geographical relationship between fee collection and use. The second nexus condition recognizes that the property must receive a benefit from the service for which the impact fee is being applied. With respect to the impact fees considered in this Study, the facilities and equipment included are used by and constructed or purchased on behalf of all properties within the City service area, and they benefit both residential and non-residential customers, except for park facilities which only serves residential customers. Consequently, all new growth requesting capacity from the City will be subject to these impact fees.

The “credit” allowance requirements recognize that if a public agency has received property in the form of cost-free capital or if there is another revenue source that will be or was used for the capital expenditures necessitated by new growth, a credit should be included within the determination of the impact fees. Specifically, “credits” should be reflected as part of calculating impact fees to recognize any grants, contributions by developers, assessments, and other sources that provide funds for the same capital expenditures included in the basis of impact fees to avoid a double recovery of cost.



IMPACT FEES STUDY

Introduction

1.3 METHODOLOGIES

There are three primary approaches for the calculation of impact fees within the industry:

Buy-In – This approach uses the value of the utility's existing assets as the basis for the fee calculation. This approach is most appropriate for a system with considerable excess capacity such that most new connections to the system will be served by that existing available capacity or when a utility does not have substantial or representative growth and expansion related projects planned in its capital improvement plan (CIP).

Incremental – This approach uses a utility's planned multi-year CIP to determine projects that are associated with the provision of additional system capacity as the cost basis for the fee. This approach is most appropriate where 1) the existing system has limited excess capacity to accommodate growth, and 2) the CIP has a substantial number of projects that provide additional system capacity for each functional system component to be representative of the cost of capacity for an entire system.

Combined – This approach uses the system's existing assets as well as the growth-related CIP as the cost basis for the fee calculation. This approach is most appropriate to use when 1) there is excess capacity in the existing system that will accommodate some growth, but additional capacity is needed in the relative short-term as reflected in the CIP, and 2) the CIP includes significant projects that will provide additional system capacity but does not necessarily have sufficient projects in each functional component to be reflective of a total system.



IMPACT FEES STUDY

Law Enforcement Impact Fee

2. LAW ENFORCEMENT IMPACT FEE

The buy-in approach was used for calculating the law enforcement impact fee because growth can be accommodated by the current capacity of the service levels, and the City is not planning a significant number of capital projects related to serving growth. The objective of the buy-in approach is to determine the costs of facilities and capital equipment necessary to serve new growth through an analysis of existing assets and existing units served.

2.1 COST BASIS

City staff has provided the specific costs for original land purchase, as well as the original costs for all vehicles, equipment and building construction within the law enforcement function. Vehicle, equipment and building costs were escalated using the Engineering News Record Construction Cost Index (ENR-CCI) to 2025 costs to identify the estimated replacement cost of each asset in current day dollars. Based upon Staff's documentation of the funding source for each purchase, existing assets funded with debt were deducted from the cost basis.¹ The current replacement costs of all law enforcement assets are presented at a summary level in Table 2 and Schedule 1 of the Appendix.

Table 2 - Law Enforcement Asset Summary

Asset Category	Description	Cost
Buildings	Replacement Cost New	\$ 8,150,914
Vehicles/Equipment	Replacement Cost New	\$ 5,265,581
Land	Original Cost	\$ 710,599
Total Existing Law Enforcement Fixed Asset Cost		\$ 14,127,094
Less : Outstanding Principal on Debt Funded Assets		\$ (4,338,249)
Net Existing Asset Cost for Fee Calculation		\$ 9,788,845

2.2 EQUIVALENT DWELLING UNITS

Different types of developments must be translated into a common unit of measurement that reflects the impact of new development on the demand for services. The law enforcement impact fee calculated in this Study utilizes a common service unit based on an "equivalent dwelling unit" or EDU, which represents the impact of a typical single-family detached dwelling.

¹ Debt funded assets are excluded from the cost basis to avoid double charging new developments (rates pay for debt funded assets).



IMPACT FEES STUDY

Law Enforcement Impact Fee

2.2.1 Functional Population

In order to assign the appropriate EDUs to properties within each land use category, EDU multipliers are utilized, based on a concept called “functional population”. Similar to the concept of full-time equivalent employees, functional population represents the number of “full-time equivalent” people present at the site of each particular land use category, in terms of the average number of equivalent persons present for an entire 24-hour day. For residential development, functional population is simply average household size times the percent of time people spend at home. For non-residential development, functional population is based on a formula that includes square foot per employee ratios, trip generation rates, average vehicle occupancy and average number of hours spent by employees and visitors at each respective land use category. These all tend to be stable characteristics that do not change significantly over time. Functional population multipliers by land use are calculated in Table 3 and 4 and include notations as to the source data and assumptions being relied upon.

Table 3 - Functional Population

Land Use	Unit	Average HH Size ¹	Daily Occupancy ²	Functional Pop./Unit ³
Residential	Dwelling	2.53	67.0%	1.69

¹ U.S. Census Bureau's American Community Survey (ACS), Public Use Microdata

² The Daily Occupancy was estimated by assuming 15 hours a day at home on weekdays (15 hrs x 5 days = 75 hrs at home) and 19 hrs a day at home on weekends (19 hrs x 2 days = 38 hrs at home).

³ For residential development, functional population is the average household size times the percent of time people are assumed to spend at home.

Table 4 - Functional Population Multipliers

Land Use	ITE Trip ¹	Trip Rate ÷ 2	Persons/ Trip ²	Employees/ Unit ³	Visitors/ Unit ⁴	Functional Pop./ Unit ⁵	Weight ⁶	Weighted Functional Pop./ Unit
Retail	37.01	18.51	1.960	0.83	35.44	1.753	28%	0.499
Office	10.84	5.42	1.210	2.08	4.48	0.879	15%	0.133
Institutional	3.06	1.53	1.740	0.97	1.70	0.393	25%	0.097
Industrial	4.75	2.38	1.210	0.80	2.07	0.311	15%	0.045
Warehouse	1.71	0.86	1.210	0.49	0.55	0.174	17%	0.030
Non Residential (Weighted Avg.)	11.47	5.74	1.47	1.03	8.85	0.70		0.804

¹ Trip rate is average daily trip ends during a weekday from Institute of Transportation Engineers (ITE), Trip Generation, 10th ed.,

² Persons/trip is average vehicle occupancy from Federal Highway Administration, Nationwide Household Travel Survey, 2017.

³ Employees/Unit is from the U.S. Department of Energy, Commercial Buildings Energy Consumption Survey, 2012

⁴ Visitors/Unit is trips times persons/trip minus employees/unit.

⁵ Functional population is estimated employee hours divided by 24hrs in a day (8 hrs times employees / unit plus visitor hours / Unit. Visitor hours / unit reflect 1 hr for Retail, Office, and Institutional and 0.5 hr for Industrial and Warehouse).

⁶ The weight for each non residential land use category represents the current distribution of developed square feet in the City calculated using the Sumter County Property Database.



IMPACT FEES STUDY

Law Enforcement Impact Fee

2.2.2 Existing Equivalent Dwelling Units

The functional population multipliers calculated in the previous section were used to establish an EDU for each land use. Since one EDU represents the impact of one average household, the residential land use category's functional population is represented by 1 EDU and the non-residential category is assigned EDUs based on their proportional relationship to the residential land use category's functional population per unit Table 5 presents this calculation.

Table 5 - EDU Assignments by Land Use Based on Functional Population Multipliers

Land Use	Functional Population / Unit	EDUs / Unit ¹	Total EDUs ²	Unit
Residential	1.692	1.00	21,561	Dwelling Unit
Non-Residential	0.804	0.47	2,768	1,000 Square Feet

¹ EDUs/Unit is calculated for the Non-Residential Land Use categories by dividing each Functional Population/Unit by the Residential Functional Population/Unit, or 1.692, since the Residential Land Use category represents 1 EDU, rounded to the nearest 2 decimal places.

² The Total EDUs for each Land Use are derived from the Sumter County Property Database. This is shown in greater detail in Schedule 6 of the Appendix.

Utilizing the Sumter County Property Appraiser's databases, the EDUs/Unit multipliers are applied to all the units contained within each land use category and added together in order to establish the total existing EDUs utilized in the impact fee calculations in the next sections. The law enforcement service area encompasses the entire City, therefore all the properties within the City were included in the analysis.

2.3 ALLOCATED COST AND IMPACT FEE PER UNIT

Once the law enforcement costs are determined and the total existing EDUs per land use category are established, the cost is allocated between residential and non-residential land uses based on their proportional share of EDUs. The allocated cost is then applied on a per-unit basis by dividing the Allocated Existing Asset Cost (shown in Table 6) by the existing units within the City for each land use category. Residential units are expressed in dwelling units (DUs), and non-residential units are expressed in square feet (Sq Ft). Table 6 presents both the allocation of law enforcement costs across land use categories and the resulting impact fee per unit.



IMPACT FEES STUDY

Law Enforcement Impact Fee

Table 6 – Impact Fee by Land Use

Buy-In Method				
	Residential		Non-Residential	
Net Existing Asset Cost	\$	9,788,845	\$	9,788,845
Total Asset Cost for Allocation	\$	9,788,845	\$	9,788,845
Existing EDU Allocation		88.6%		11.4%
Allocated Existing Asset Cost	\$	8,675,022	\$	1,113,823
Existing Units		21,561 <i>DUs</i>		5,890,019 <i>Sq Ft</i>
Projected Units		- <i>DUs</i>		- <i>Sq Ft</i>
Total Units for Cost Apportionment		21,561 <i>DUs</i>		5,890,019 <i>Sq Ft</i>
Law Enforcement Impact Fee per Unit	\$	402.35 <i>per DU</i>	\$	0.19 <i>Per Sq Ft</i>
Current Fee	\$	271.42	\$	0.19
Change %		48%		0%

¹ The Net Asset Cost was allocated amongst the Residential (88.6%) and Non-Residential (11.4%) customer classes based upon the existing proportionate share of Equivalent Dwelling Units (EDUs) in the City.

2.4 RECOMMENDED IMPACT FEE

Impact fees may be adopted at any level up to the 100% cost recovery calculated herein and shown in Table 6. Our recommendation for the City is to consider adopting the calculated law enforcement impact fees at 100% cost recovery and phase-in the increase over the next four years. The recommended increase amounts to approximately 48% for residential and 0% for non-residential. Table 7 shows the recommended law enforcement impact fees phase in schedule at 100% cost recovery.

Table 7 - Recommended Law Enforcement Impact Fees Phase-in

Land Use	Calculated Change	Phase-In Time	Current Fee	Year 1	Year 2	Year 3	Year 4
Residential	48%	4 Year	\$ 271.42	\$ 304.15	\$ 336.88	\$ 369.62	\$ 402.35
Non-Residential	0%	N/A	\$ 0.19	\$ 0.19	\$ 0.19	\$ 0.19	\$ 0.19



IMPACT FEES STUDY

Park Impact Fee

3. PARK IMPACT FEE

The buy-in approach was used for calculating the recreation fee because growth can be accommodated by the current capacity of the system and the City is not planning for a significant amount of capital projects related to serving growth. The objective of the buy-in approach is to determine the costs of facilities and capital equipment necessary to serve new growth through an analysis of the existing assets and existing units served.

3.1 COST BASIS

Under the buy-in approach, only the value of existing assets is included in the cost basis, such as vehicles, equipment and building construction within the parks function. Asset costs were escalated using the Engineering News Record Construction Cost Index (ENR-CCI) to 2025 costs to identify the estimated replacement cost of each asset in current day dollars. Equipment and vehicle costs were removed from the analysis, as they are not eligible to be included in the cost basis for park impact fees according to the Florida state statutes governing impact fees. With assistance from City staff, any assets that were donated, or paid for using debt have been also excluded from the cost basis. A summary of the cost basis for the park facilities is shown in Table 8 and Schedule 2 of the Appendix.

Table 8 - Cost Basis for Park Facilities

Asset Category	Description	Cost
Building	Replacement Cost New	\$ 5,255,153
Equipment/Vehicles	Replacement Cost New	\$ 2,059,869
Land	Original Cost	\$ 652,850
Total Existing Park Fixed Asset Cost		\$ 7,967,871
Less : Outstanding Principal on Debt Funded Assets		\$ (223,623)
Less: Equipment/Vehicles		\$ (2,059,869)
Net Cost Basis for Fee Calculation		\$ 5,684,379

3.2 EQUIVALENT DWELLING UNITS

The park impact fee calculated in this Study utilizes equivalent dwelling units, consistent with the buy in approach. Utilizing the Sumter County Property Appraiser's databases, all residential EDUs are added together in order to establish the total existing EDUs utilized in the impact fee calculations. It is noteworthy that the combined EDUs exclude the residential dwelling units associated with The Villages retirement community. This is because, The Villages community is exempt from park impact fee and excluded from the service area, as part of an agreement with the City. The combined equivalent dwelling units used as the basis for the City's current capacity equals 5,657.



IMPACT FEES STUDY

Park Impact Fee

3.3 IMPACT FEE PER UNIT

Once the park cost basis is determined and the allocable units are established, the park impact fee per dwelling unit is calculated. The details of the calculation of the impact fee are shown in Table 9.

Table 9 – Calculation of Park Impact Fee

	Residential
Net Existing Asset Cost	\$ 5,684,379
Total Asset Cost for Fee Calculation	\$ 5,684,379
Existing Units	5,657 <i>DUs</i>
Projected Dwelling Units	0
Total Units for Cost Apportionment	5,657 <i>Dwelling Units</i>
Park Impact Fee per Unit	\$ 1,004.84
Cost Recovery %	54.7%
Park Impact Fee per Unit (Recommended)	\$ 549.45
Current Fee	\$ 366.30
Change %	50%

3.4 RECOMMENDED IMPACT FEE

Florida state statutes dictates that under normal circumstances impact fees may not be adopted at full cost recovery if the calculated fee amount represents more than 50% increase as compared to current fees. Table 8 presents the full cost recovery calculated fee, which is higher than the 50% increase allowed by Florida Statute. To maintain compliance with Florida statutes, it is recommended that the City adopt the park impact fee at a 54.7% cost recovery level. The recommended impact fee represents a 50% increase from the current impact fee as shown in Table 10.

Table 10 - Recommended Park Impact Fee

Park Impact Fee per Unit	\$ 1,004.84
Cost Recovery %	54.7%
Park Impact Fee per Unit (Recommended)	\$ 549.45
Current Fee	\$ 366.30
Change %	50%



IMPACT FEES STUDY

Park Impact Fee

A phased implementation plan is necessary to achieve the recommended increase over a four-year period. Table 11 illustrates the recommended park impact fees phase in schedule, alongside the City's current park impact fee

Table 11 - Recommended Park Impact Fees Phase-in Schedule

Land Use	Calculated Change	Phase-In Time	Current Fee	Year 1	Year 2	Year 3	Year 4
Residential	50%	4 Year	\$ 366.30	\$ 412.09	\$ 457.88	\$ 503.66	\$ 549.45



IMPACT FEES STUDY

Water and Sewer System Development Charges

4. WATER AND SEWER SYSTEM DEVELOPMENT CHARGES

The Study used the buy-in approach as the cost basis for the water system development charge because the Water Utility can accommodate near-term growth with the current capacity, and it does not have significant expansion projects identified in the near-term to be able to serve new growth or redevelopment. However, for the sewer system development charge, the combined approach was used because the Sewer System has identified a combination of major expansion projects, aggregated into the Wastewater Treatment Facility Expansion, in the City's CIP, in order to serve future development.

The first step in calculating the fees was to determine the cost basis for each major system (water and sewer) function (i.e., transmission, treatment, supply, disposal), and identify any expansionary CIP that could be included. The second step was to determine each system's capacities by functional cost component as stated in terms of Equivalent Residential Units (ERUs).

4.1 SYSTEM VALUE – COST BASIS

The asset listing for the Utility's existing and in-service assets serves as part of the basis to determine the water and sewer system's existing value. Stantec evaluated the Utility's fixed asset listing, accounting records of assets, which included an asset number and description, location description, purchase date or year in service, useful life, and net book value of each asset.

Stantec removed assets contributed by a developer or received at no cost such as grants. Stantec then allocated each fixed asset to its corresponding system and functional cost components; Stantec provided that allocation list to Utility staff for review. Water assets were functionalized by supply/treatment and transmission, whereas sewer assets were functionalized by treatment and conveyance. General and Administrative assets were split amongst each functional component based on their share of the direct asset allocation.

To determine the current system value, FY 2025 replacement cost, for the water and sewer systems, Stantec escalated the net book value of each asset utilizing the Engineering News Record (ENR) Construction Cost Index and the year the City placed each asset in service. In this way, Stantec identified the value of the water and sewer systems stated in terms of replacement cost new less depreciation (RCNLD). Table 12 and Schedule 3 of the Appendix provides the Utility's fixed assets in service, RCNLD, and applicable allocations for calculation of the water and sewer impact fees under the buy-in approach.



IMPACT FEES STUDY

Water and Sewer System Development Charges

Once the RCNLD was determined for the water and sewer systems, a credit was applied to the respective system value in recognition of outstanding debt incurred to fund the existing system in service. Upon connection to the system, new customers will pay recurring monthly rates which recover the cost of existing debt service. Therefore, to avoid a double recovery a credit is given within the impact fee calculation.

The approach for establishing the sewer system cost basis also included the Utility's planned Wastewater Treatment Facility Expansion (WWTF Expansion). The total WWTF Expansion cost is estimated at \$156 million with offsetting funding from general contributions and grants resulting in a net total cost of approximately \$132 million for inclusion in the combined cost basis.

Table 12 - Fixed Assets in Service

Function		Gross RCN Asset Value	Net RCN Asset Value	% of Total	Net Asset Value + Allocated Admin
Water	Transmission	\$ 6,826,752	\$ 6,826,752	5.28%	\$ 6,826,752
Water	Treatment/Supply	\$ 50,134,462	\$ 50,134,462	38.77%	\$ 50,134,462
Sewer	Conveyance	\$ 17,540,301	\$ 17,540,301	13.56%	\$ 17,540,301
Sewer	Treatment	\$ 54,812,206	\$ 54,812,206	42.39%	\$ 54,812,206
Total		\$ 129,313,721	\$ 129,313,721	100%	\$ 129,313,721

The total cost basis for the water system is summarized in Table 13 below.

Table 13 – Water Buy-In Cost Basis

Functional Component:	Transmission		Treatment/Supply		Total
Gross Plant in Service Value	\$	6,826,752	\$	50,134,462	\$ 56,961,214
Capital Improvement Cost		-		-	-
Gross System Value	\$	6,826,752	\$	50,134,462	\$ 56,961,214
Less:					
Principal Credit	\$	481,702	\$	3,537,533	\$ 4,019,234
Net System Value	\$	6,345,051	\$	46,596,929	\$ 52,941,980

The total cost basis for the sewer system is summarized in Table 14 below.

Table 14 – Sewer Combined Cost Basis

Functional Component:	Conveyance		Treatment		Total
Gross Plant in Service Value	\$	17,540,301	\$	54,812,206	\$ 72,352,507
Capital Improvement Cost		-		156,813,500	156,813,500
Gross System Value	\$	17,540,301	\$	211,625,706	\$ 229,166,007
Less:					
Principal Credit	\$	664,607	\$	2,076,851	\$ 2,741,458
Contributions from Other Sources			\$	15,500,000	\$ 15,500,000
Grants	\$	-	\$	9,250,000	\$ 9,250,000
Net System Value	\$	16,875,694	\$	184,798,855	\$ 201,674,549

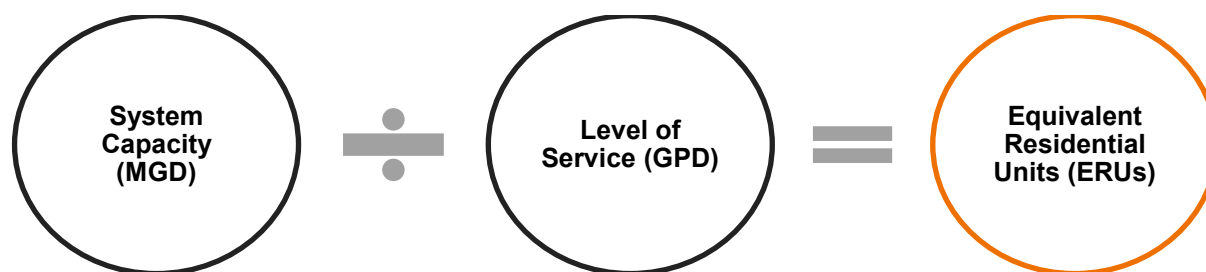


4.2 SYSTEM CAPACITY – EQUIVALENT RESIDENTIAL UNITS (ERUS)

Once the total cost basis of each system by functional cost component was determined, the next step was to determine the system capacities as stated in terms of equivalent residential units (ERUs).

Expressing the system capacities in terms of ERUs allows for the development of the unit pricing of capacity which is essential for the determination of water and sewer impact fees. The total system capacity stated in MGD for each system divided by the level of service stated in terms of gallons per day (GPD) per ERU is equal to the total number of ERUs that the Utility can serve with the identified infrastructure outlined herein. Figure 1 provides a summary of the conversion calculation from system capacity stated in terms of flow to capacity in ERUs.

Figure 1 - Equivalent Residential Units Calculation



The City's water and sewer systems consist of numerous functional components such as water treatment, source of supply, transmission, and storage. Each of the functional components have a physical or regulatory permitted capacity. While treatment, supply, and disposal capacities are generally accepted to be either the physical or regulatory permitted capacity of such facilities and are readily available, transmission system capacities are more difficult to quantify.

Therefore, it is common to define the capacity for all functional components (including the transmission facilities) based on the system's total treatment capacity. This approach was utilized for the determination of the Utility's system capacities. The rationale is that even if the transmission and pumping portion of either system is larger than that system's treatment capacity, the only capacity the system can offer to its users is its total treatment capacity.

The approach to establishing the sewer system's capacity included the projected additional capacity from the planned wastewater treatment facility project. The project is projected to add 2.95 MGD to the Utility's current 3.55 MGD for a total projected capacity of 6.5 MGD.



IMPACT FEES STUDY

Water and Sewer System Development Charges

Table 15 summarizes the capacity by function used in the fee calculation. The water and sewer system capacities reflect existing assets in service rather than future capacities.

Table 15 - System Capacities: Million Gallons per Day

System	Supply / Treatment	Transmission / Conveyance
Water	7.90	7.90
Sewer	6.50	6.50

4.3 LEVEL OF SERVICE

In the evaluation of the capital facility needs for providing water and sewer utility services, it is critical to define a level of service. The “level of service” means an indicator of the extent or degrees of service provided by, or proposed by a facility, based on, and related to the operational characteristics of the facility. Utilities establish level of service standards to ensure provision of adequate facility capacity for future development and for purposes of issuing development orders or permits.

For water and sewer systems, the level of service is the amount of capacity allocable to an ERU expressed as the amount of usage in gallons. This reflects the amount of capacity allowable per ERU represented by a 5/8” or 3/4” meter equivalent for a single-family residence, whether they use such capacity or not. The Utility’s level of service was defined by the City’s most recent Comprehensive Plan, which is 300 gallons per day (gpd) per capita for water and 250(gpd) for sewer service, as summarized in Table 16.

Table 16 - Level of Service

Description	Water	Wastewater	Notes
Demand per Capita (GPD)	300	250	City’s Comprehensive Plan

4.4 RESULTS

After determining the cost basis (net RCNLD) of each system and the number of ERUs each system can serve, unit costs of capacity are calculated by dividing the cost basis by the total number of ERUs a system can serve. Figure 5 presents the calculated unit costs of capacity by system (water and sewer) at full (100%) cost recovery and compares them to the City’s current impact fees. The comparison illustrates

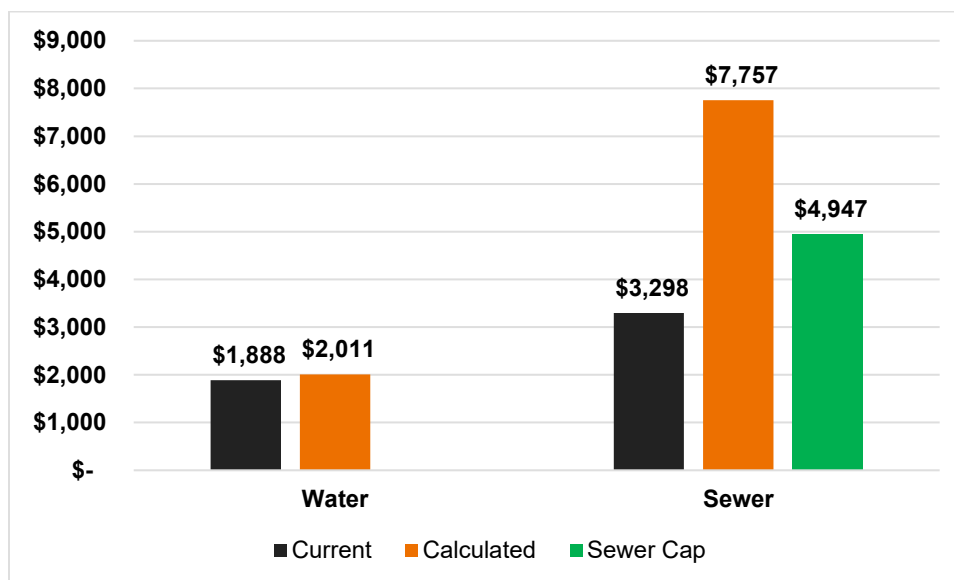


IMPACT FEES STUDY

Water and Sewer System Development Charges

that the calculated water system development charge represents a modest increase of 7% over the existing charge and should be phased-in over two years in accordance with state guidelines.

Figure 2 - Current and Calculated Water and Sewer System Development Charge Per ERU



The comparison illustrates sewer system development charges are significantly lower than the Utility's actual cost of providing capacity. In accordance with state guidelines on impact fees, the increase to the sewer fee is capped at 50% (or \$4,947) and phased in over a four-year period as shown in Table 18.

Table 17 – Phase in Schedule

System Development Charge	Calculated Charge	Phase-in Time	Current Fee	Year 1	Year 2	Year 3	Year 4
Water	7%	2 Year	\$1,888.00	\$1,949.50	\$2,011.00	\$2,011.00	\$2,011.00
Sewer	50%	4 Year	\$3,298.00	\$3,710.25	\$4,122.50	\$4,534.75	\$4,947.00



5. BENCHMARKING

To provide additional context to the City regarding the calculated impact fees and system development charges, we prepared comparisons of the City's existing and calculated law enforcement and park impact fees, as well as water and sewer system development charges, to those of neighboring and generally comparable municipalities and utilities. These comparisons are presented in Figure 6.

The reader should view these comparisons with caution. No in-depth analysis was performed to determine the specific methodologies used by other jurisdictions in developing their fees, nor whether the fees are designed to recover 100% of costs. Additionally, no analysis was conducted to identify the types of capital facilities currently in service or planned by the agencies surveyed.

Water and sewer impact fees may differ among utilities for a variety of reasons including the following:

- Source of supply and proximity thereto
- Type and complexity of treatment
- Effluent disposal method
- Density of service area
- Availability of grant funding to finance Capital Improvement Projects (CIP)
- Age of system
- Utility life cycle (i.e., growth-oriented vs. mature)
- Level of service standards
- Methodology used and date or period of last fee update.

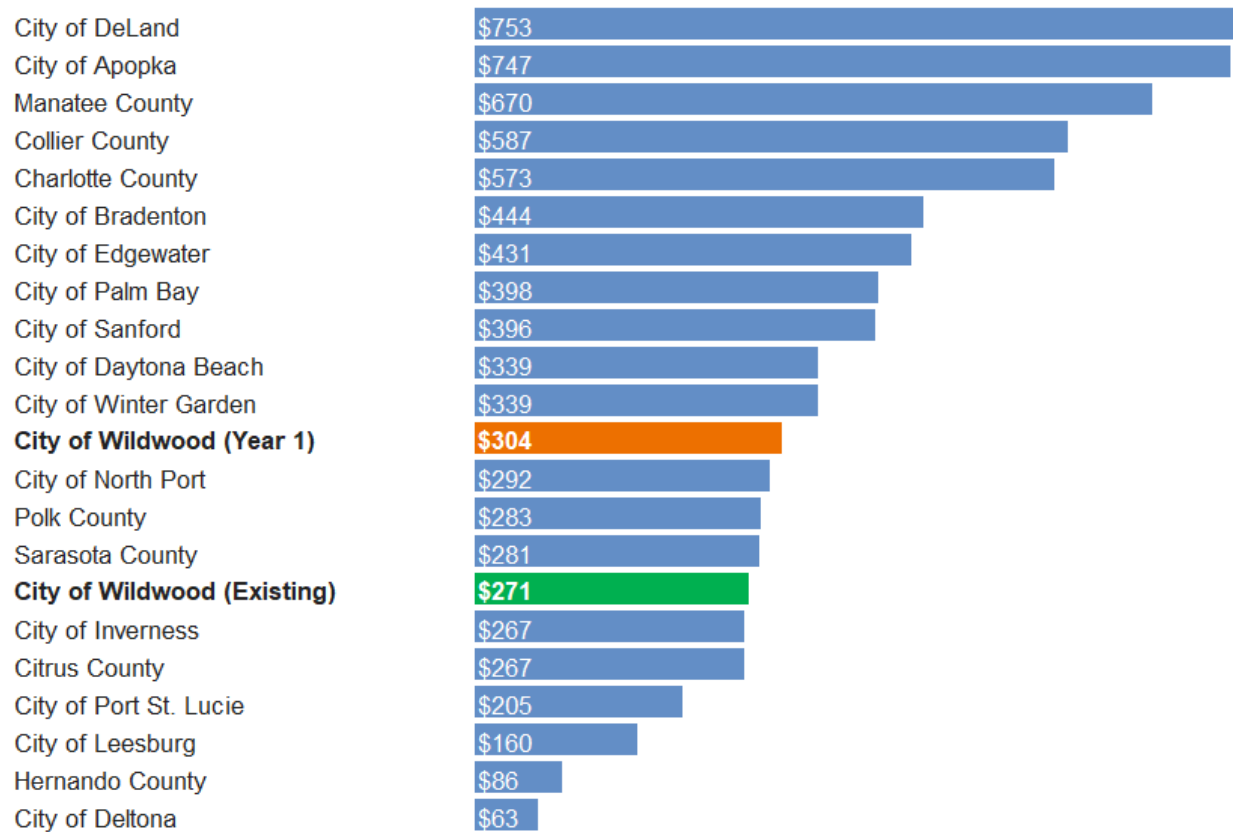


IMPACT FEES STUDY

Benchmarking

Figure 3

Law Enforcement Impact Fee Survey - Residential (per Dwelling Unit)

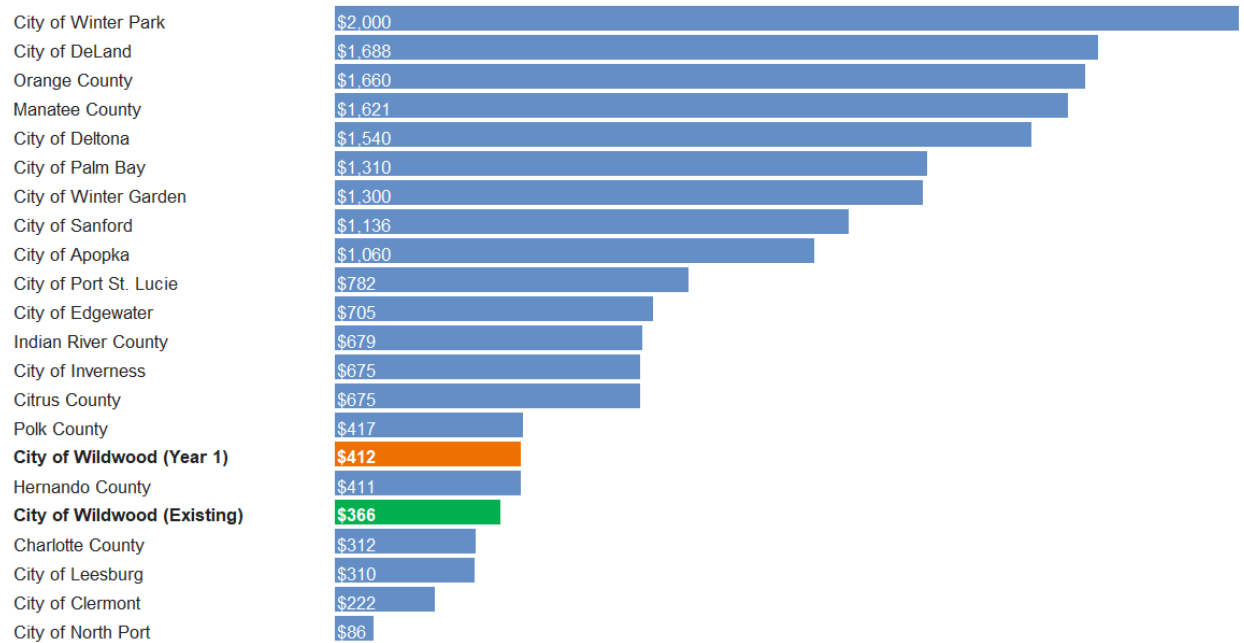


IMPACT FEES STUDY

Benchmarking

Figure 4

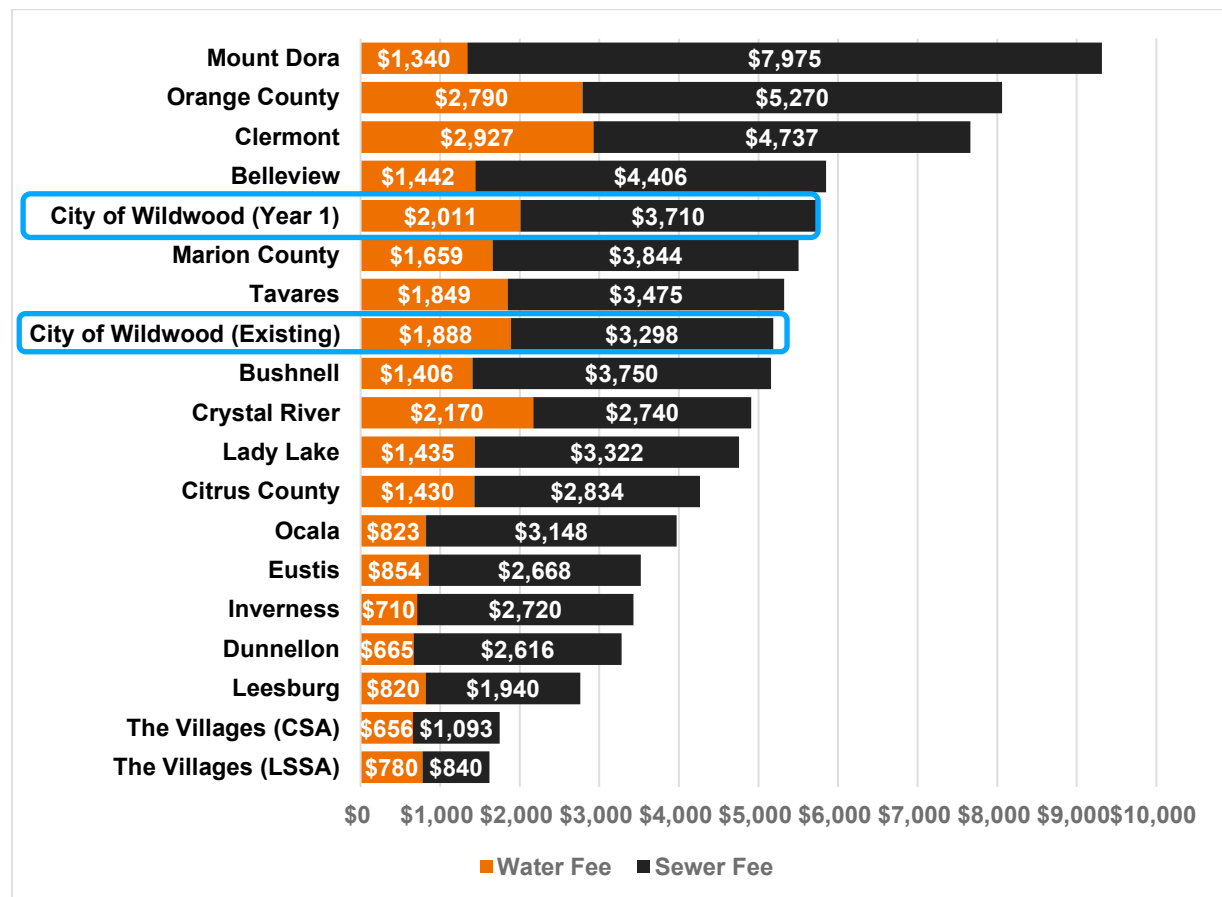
Recreation Impact Fee Survey - Residential (per Dwelling Unit)



IMPACT FEES STUDY

Benchmarking

Figure 5 - Water and Sewer Comparison



IMPACT FEES STUDY

Recommended Fees and Implementation

6. RECOMMENDED FEES AND IMPLEMENTATION

A recent update to the Florida Impact Fee legislation limits impact fee increases to 50%. Also, the legislation requires that any fee increase between 0% and 25% should be implemented in two equal increments and a fee increase greater than 25% but equal to or less than 50% should be implemented in four equal increments. Furthermore, impact fees may not increase more than once every 4 years. In accordance with these guidelines, Stantec developed a phased-in approach to implement increases to the City's impact fees. The phased in approach for one equivalent residential unit is outlined in Table 18.

Table 18 - Recommended Law Enforcement and Park Impact Fees and Water and Sewer, System Development Charges

	Current Fee	Increase	Year 1	Year 2	Year 3	Year 4
Law Enforcement	\$271.42	48%	\$304.15	\$336.88	\$369.62	\$402.35
Recreation	\$366.30	50%	\$412.09	\$457.88	\$503.66	\$549.45
Water	\$1,888	7%	\$1,950	\$2,011	\$2,011	\$2,011
Sewer	\$3,298	50%	\$3,710	\$4,123	\$4,535	\$4,947
Total	\$5,824		\$6,437	\$6,929	\$7,419	\$7,910

The recommended increases result in impact fees that are closer to the actual cost of the infrastructure to support new growth and will minimize the impact to existing customers to fund future expansion costs. Additionally, Stantec recommends that the City review these fees every four years to ensure that they remain fair and equitable and continue to reflect the current cost of capacity.



Appendix: Fixed Asset Schedules



Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	RCN	Notes
Land						
3939 E C-462 - New Police Station	Land	2016	\$ 575,000	1.3127	\$ 575,000	34% of the Cost Included (% of New Facility Providing Existing Service)
610 Jackson Street - PD Sub Station	Land	1962	\$ 3,250	15.5634	\$ 3,250	
100 Huey Street - Police Department	Land	1965	\$ 13,000	13.9766	\$ 13,000	
400 Roy Street - Impound/Communication Tower	Land	2004	\$ 119,349	1.9074	\$ 119,349	
Roof At Police Station	Buildings	2007	\$ 53,519	1.7034	\$ 91,166	
Wall Mount Cooling System for Radio Tower	Buildings	2016	\$ 6,400	1.3127	\$ 8,401	
New Police Station Headquarters	Buildings	2021	\$ 7,198,469	1.1185	\$ 8,051,347	
Generator	Vehicles/Equipment	1994	\$ 30,000	2.5095	\$ 75,285	
Tri Bar Industries Speed Radar Trailer	Vehicles/Equipment	1998	\$ 6,251	2.2924	\$ 14,330	
Radar Unit	Vehicles/Equipment	2003	\$ 6,251	2.0271	\$ 12,671	
Radar Unit	Vehicles/Equipment	2003	\$ 1,697	2.0271	\$ 3,439	
Radar Tower	Vehicles/Equipment	2003	\$ 1,350	2.0271	\$ 2,737	
Radio Base Station	Vehicles/Equipment	2003	\$ 1,350	2.0271	\$ 2,737	
Radio Base Station	Vehicles/Equipment	2003	\$ 1,350	2.0271	\$ 2,737	
Eagle Radar - LAS465	Vehicles/Equipment	2004	\$ 1,350	1.9074	\$ 2,575	
Kustom Eagle II Radar	Vehicles/Equipment	2005	\$ 1,992	1.8226	\$ 3,631	
Kustom Eagle II Radar	Vehicles/Equipment	2005	\$ 774	1.8226	\$ 1,411	
Kustom Eagle II Radar	Vehicles/Equipment	2005	\$ 10,690	1.8226	\$ 19,484	
Kustom Eagle II Radar	Vehicles/Equipment	2005	\$ 1,378	1.8226	\$ 2,512	
SHIELD	Excluded	2005	\$ 99,971	1.8226	\$ 182,210	
Portable Radio	Excluded	2007	\$ 1,498	1.7034	\$ 2,552	
video System and Console	Vehicles/Equipment	2007	\$ 2,066	1.7034	\$ 3,519	
DIGITAL CAMERAS	Vehicles/Equipment	2008	\$ 1,098	1.6331	\$ 1,794	
NEW RADIO TOWER	Vehicles/Equipment	2008	\$ 8,782	1.6331	\$ 14,341	
Traffic Counter	Vehicles/Equipment	2008	\$ 796	1.6331	\$ 1,300	
Crossmatch Livescan Scanner Model ID500M	Vehicles/Equipment	2009	\$ 1,000	1.5836	\$ 1,584	
Crossmatch Xerox Printer for Livescan Scanner	Vehicles/Equipment	2009	\$ 865	1.5836	\$ 1,369	
Dell Latitude E5400 Laptop Computer for Livescan	Vehicles/Equipment	2009	\$ 797	1.5836	\$ 1,262	
Vertex VX-824 Portable Radio w/Charger	Vehicles/Equipment	2009	\$ 774	1.5836	\$ 1,225	
Canon Photolithography Inkjet Printer	Excluded	2009	\$ 1,000	1.5836	\$ 1,584	
Honeywell Portable Generator 5500 w/Electric Start	Vehicles/Equipment	2009	\$ 802	1.5836	\$ 1,270	
Advanced Protection - Through the Glass Comm Mic	Vehicles/Equipment	2009	\$ 4,500	1.5836	\$ 7,126	
Vertex Standard VX824D05 Portable Radio w/Charger	Vehicles/Equipment	2010	\$ 1,495	1.5418	\$ 2,305	
Dell Optiplex 380 Desktop w/20" Monitor	Vehicles/Equipment	2010	\$ 918	1.5418	\$ 1,415	
Vertex Standard VX824 Portable Radio w/Charger	Vehicles/Equipment	2010	\$ 1,284	1.5418	\$ 1,980	
(5) GRIP PLATES W/TEKLOCK HOLSTERS	Vehicles/Equipment	2010	\$ 4,500	1.5418	\$ 6,938	
DIGITALCOP MUGSHOT SOFTWARE	Vehicles/Equipment	2010	\$ 1,495	1.5418	\$ 2,305	
VERTEX VX-2200 RADIO	Vehicles/Equipment	2010	\$ 918	1.5418	\$ 1,415	
BlueTree 5600 Verizon EVDO Sierra	Vehicles/Equipment	2010	\$ 1,284	1.5418	\$ 1,980	
BlueTree 5600 Verizon EVDO Sierra	Vehicles/Equipment	2010	\$ 630	1.5418	\$ 971	

Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	RCN	Notes
Super Circuits CS Mount Camera's	Vehicles/Equipment	2011	\$ 605	1.4963	\$ 905	
Super Circuit Wide Angle Color Camera	Vehicles/Equipment	2011	\$ 292	1.4963	\$ 437	
Gun Racks	Excluded	2011	\$ 528	1.4963	\$ 790	
Gamma Tech C-SM2300 Laptop w/Windows 7 Pro	Vehicles/Equipment	2011	\$ 1,172	1.4963	\$ 1,753	
Law Enforcement Supply-Cones,Mag Lite	Excluded	2011	\$ 468	1.4963	\$ 701	
BlueTree Modems	Excluded	2011	\$ 483	1.4963	\$ 723	
Portable Radio	Excluded	2011	\$ 601	1.4963	\$ 899	
Portable Radio	Excluded	2011	\$ 601	1.4963	\$ 899	
Synthetic/Blk 14" 12 Modified Bead	Excluded	2011	\$ 760	1.4963	\$ 1,137	
Patrolmans Carbine	Excluded	2011	\$ 785	1.4963	\$ 1,175	
Patrolmans Carbine	Excluded	2011	\$ 785	1.4963	\$ 1,175	
Bushmaster XM15-E25 Custom AR 15 Automatic Rifle	Excluded	2011	\$ 90	1.4963	\$ 135	
Bushmaster XM15-E25 Custom AR 15 Automatic Rifle	Excluded	2011	\$ 90	1.4963	\$ 135	
Vertex VX-824D-05 Portable Radio w/Charger	Vehicles/Equipment	2012	\$ 844	1.4580	\$ 1,231	
Vertex VX-824D-05 Portable Radio w/Charger	Vehicles/Equipment	2012	\$ 844	1.4580	\$ 1,231	
Taser International X-26 Yellow ERD Taser	Excluded	2012	\$ 812	1.4580	\$ 1,184	
Taser International X-26 Yellow ERD Taser	Excluded	2012	\$ 812	1.4580	\$ 1,184	
Durabook D14RM-WKE Laptop w/Windows 7 Pro	Vehicles/Equipment	2012	\$ 1,135	1.4580	\$ 1,655	
Durabook D14RM-WKE Laptop w/Windows 7 Pro	Vehicles/Equipment	2012	\$ 1,135	1.4580	\$ 1,655	
Mitel 3000 Phone System	Excluded	2012	\$ 8,643	1.4580	\$ 12,601	
Smartvue S9X1 Camera/Video Recorder Wireless	Vehicles/Equipment	2012	\$ 1,170	1.4580	\$ 1,706	
Bushmaster XM15E2S Short BBL 223 A3 Rifle	Excluded	2012	\$ 860	1.4580	\$ 1,254	
Bushmaster XM15E2S Short BBL 223 A3 Rifle	Excluded	2012	\$ 860	1.4580	\$ 1,254	
2013 Ford Police Interceptor	Vehicles/Equipment	2012	\$ 29,835	1.4580	\$ 43,500	
2013 Ford Police Interceptor	Vehicles/Equipment	2012	\$ 29,835	1.4580	\$ 43,500	
Bravo 4101 XRP Disc Publisher Burner	Vehicles/Equipment	2012	\$ 2,278	1.4580	\$ 3,321	
Eagle IIX Radar Gun	Vehicles/Equipment	2012	\$ 1,535	1.4580	\$ 2,238	
Southern Custom Creations	Excluded	2013	\$ 1,950	1.4216	\$ 2,772	
Stoptech LTD	Excluded	2013	\$ 3,074	1.4216	\$ 4,370	
DSG Sands Corp	Vehicles/Equipment	2013	\$ 3,462	1.4216	\$ 4,921	
Kustom Signals Eagle IIX Radar Gun	Excluded	2013	\$ 1,465	1.4216	\$ 2,083	
Kustom Signals Eagle IIX Radar Gun	Excluded	2013	\$ 1,465	1.4216	\$ 2,083	
Kustom Signals Eagle IIX Radar Gun	Excluded	2013	\$ 1,465	1.4216	\$ 2,083	
Kustom Signals Eagle IIX Radar Gun	Excluded	2013	\$ 1,465	1.4216	\$ 2,083	
Durabook G15C-HD Laptop w/Windows 7 Pro	Vehicles/Equipment	2013	\$ 1,125	1.4216	\$ 1,599	
Durabook G15C-HD Laptop w/Windows 7 Pro	Vehicles/Equipment	2013	\$ 1,125	1.4216	\$ 1,599	
Vehicle 2014 Ford Explorer	Vehicles/Equipment	2014	\$ 34,388	1.3839	\$ 47,590	
Vehicle 2014 Ford Explorer	Vehicles/Equipment	2014	\$ 34,388	1.3839	\$ 47,590	
Vehicle 2014 Ford Explorer	Vehicles/Equipment	2014	\$ 34,388	1.3839	\$ 47,590	
Vehicle 2014 Ford Explorer	Vehicles/Equipment	2014	\$ 34,388	1.3839	\$ 47,590	
Vehicle 2014 Ford Explorer	Vehicles/Equipment	2014	\$ 32,563	1.3839	\$ 45,064	
Vehicle 2014 Ford Explorer	Vehicles/Equipment	2014	\$ 32,563	1.3839	\$ 45,064	
American Aluminum E/Z Kennel - Portable	Vehicles/Equipment	2014	\$ 2,000	1.3839	\$ 2,768	
American Aluminum E/Z Kennel - Portable	Vehicles/Equipment	2014	\$ 1,779	1.3839	\$ 2,462	
Dell E5430 Laptop w/Windows 7 Pro	Vehicles/Equipment	2014	\$ 844	1.3839	\$ 1,168	
Ultra Kimono RS65-XL K9 Training Bite Suit	Excluded	2014	\$ 1,530	1.3839	\$ 2,117	
2014 Ford Explorer	Vehicles/Equipment	2014	\$ 37,956	1.3839	\$ 52,528	

Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	RCN	Notes
Raptor RP-1 Radar	Excluded	2014	\$ 1,535	1.3839	\$ 2,124	
Dell 5000 Series Lapto w/Windows 7 Pro	Vehicles/Equipment	2014	\$ 882	1.3839	\$ 1,221	
Dell 5000 Series Lapto w/Windows 7 Pro	Vehicles/Equipment	2014	\$ 882	1.3839	\$ 1,221	
Dell 5000 Series Lapto w/Windows 7 Pro	Vehicles/Equipment	2014	\$ 882	1.3839	\$ 1,221	
IEI Max 3 Access Control System-Keyless Door Entry	Excluded	2014	\$ 4,690	1.3839	\$ 6,491	
Carolina Carports - Metal Framed Covered Canopy	Vehicles/Equipment	2014	\$ 845	1.3839	\$ 1,169	
Falcon BC2u FDLE Rapid ID Scanner for Fingerprints	Excluded	2014	\$ 2,039	1.3839	\$ 2,822	
Falcon BC2u FDLE Rapid ID Scanner for Fingerprints	Excluded	2014	\$ 2,039	1.3839	\$ 2,822	
Eagle IIX Radar Gun	Vehicles/Equipment	2014	\$ 1,535	1.3839	\$ 2,124	
2015 Ford Truck - Police Interceptor	Vehicles/Equipment	2014	\$ 34,604	1.3839	\$ 47,889	
Microsoft Core i3 4020Y MS Surface Pro 3 Tablet	Vehicles/Equipment	2014	\$ 788	1.3839	\$ 1,091	
Dell Optiplex 7020 Desktop Computer	Vehicles/Equipment	2014	\$ 1,360	1.3839	\$ 1,882	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2014	\$ 1,389	1.3839	\$ 1,922	
Presidio AIO 2.0 Map Agent	Vehicles/Equipment	2014	\$ 1,995	1.3839	\$ 2,761	
Taser International X-26P Yellow ERD Taser	Excluded	2014	\$ 874	1.3839	\$ 1,210	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2015	\$ 900	1.3530	\$ 1,218	
Taser International X-26P Yellow ERD Taser w/cam	Excluded	2015	\$ 900	1.3530	\$ 1,218	
2015 Ford Interceptor	Vehicles/Equipment	2015	\$ 32,736	1.3530	\$ 44,290	
Dell 5000 Series Laptop w/Windows 7 Pro	Vehicles/Equipment	2015	\$ 902	1.3530	\$ 1,220	
2015 Kawasaki Mule Pro FXT	Vehicles/Equipment	2016	\$ 12,900	1.3127	\$ 16,933	
2015 Ford Police Interceptor AWD	Vehicles/Equipment	2015	\$ 32,996	1.3530	\$ 44,642	
2015 Ford Police Interceptor AWD	Vehicles/Equipment	2015	\$ 32,996	1.3530	\$ 44,642	
Dell Latitude 5000 Laptop w/Windows 7 Pro	Vehicles/Equipment	2015	\$ 830	1.3530	\$ 1,123	
Dell Latitude 5000 Laptop w/Windows 7 Pro	Vehicles/Equipment	2015	\$ 830	1.3530	\$ 1,123	
Guardian/Dell LiveScan Laptop and Scanner	Vehicles/Equipment	2015	\$ 9,800	1.3530	\$ 13,259	

Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	RCN	Notes
Axon 6 Bay Docking Station & Desk Plate	Vehicles/Equipment	2015	\$ 1,500	1.3530	\$ 2,029	
Axon 6 Bay Docking Station & Desk Plate	Vehicles/Equipment	2015	\$ 1,500	1.3530	\$ 2,029	
AR-15 Rifle 223 Cal	Excluded	2015	\$ 549	1.3530	\$ 743	
AR-15 Rifle 223 Cal	Excluded	2015	\$ 549	1.3530	\$ 743	
AR-15 Rifle 223 Cal	Excluded	2015	\$ 549	1.3530	\$ 743	
AR-15 Rifle 223 Cal	Excluded	2015	\$ 549	1.3530	\$ 743	
AR-15 Rifle 223 Cal	Excluded	2015	\$ 549	1.3530	\$ 743	
AR-15 Rifle 223 Cal	Excluded	2015	\$ 549	1.3530	\$ 743	
Mark 10 Safety Restraint Chair	Excluded	2016	\$ 1,899	1.3127	\$ 2,493	
Keyless Evidence Locker (2)	Excluded	2015	\$ 4,722	1.3530	\$ 6,389	
Evidence Refrigerator	Excluded	2015	\$ 5,555	1.3530	\$ 7,516	
Falcon BC2u FDLE Rapid ID Scanner for Fingerprints	Excluded	2016	\$ 1,995	1.3127	\$ 2,619	
2015 Ford Explorer	Vehicles/Equipment	2016	\$ 27,024	1.3127	\$ 35,473	
2015 Ford Explorer	Vehicles/Equipment	2016	\$ 34,002	1.3127	\$ 44,633	
2015 Ford Explorer	Vehicles/Equipment	2016	\$ 34,002	1.3127	\$ 44,633	
2015 Ford Explorer	Vehicles/Equipment	2016	\$ 35,264	1.3127	\$ 46,290	
2015 Ford Explorer	Vehicles/Equipment	2016	\$ 26,000	1.3127	\$ 34,129	
Taser International X-26P Yellow ERD Taser w/cam	Vehicles/Equipment	2016	\$ 931	1.3127	\$ 1,222	
Taser International X-26P Yellow ERD Taser w/cam	Vehicles/Equipment	2016	\$ 931	1.3127	\$ 1,222	
Taser International X-26P Yellow ERD Taser w/cam	Vehicles/Equipment	2016	\$ 931	1.3127	\$ 1,222	
Falcon HR Radar Gun	Vehicles/Equipment	2017	\$ 1,407	1.2640	\$ 1,778	
Falcon HR Radar Gun	Vehicles/Equipment	2017	\$ 1,407	1.2640	\$ 1,778	
Casella Cel-242 Sound Level Meter Kit	Vehicles/Equipment	2017	\$ 1,295	1.2640	\$ 1,637	
Casella Cel-242 Sound Level Meter Kit	Vehicles/Equipment	2017	\$ 1,295	1.2640	\$ 1,637	
Taser International X-26P Yellow ERD Taser	Excluded	2017	\$ 964	1.2640	\$ 1,219	
Taser International X-26P Yellow ERD Taser	Excluded	2017	\$ 964	1.2640	\$ 1,219	
Taser International X-26P Yellow ERD Taser	Excluded	2017	\$ 964	1.2640	\$ 1,219	
2015 Ford Explorer	Vehicles/Equipment	2017	\$ 30,209	1.2640	\$ 38,185	
Dell E5430 Laptop w/Windows 7 Pro	Vehicles/Equipment	2017	\$ 818	1.2640	\$ 1,034	
Dell E5430 Laptop w/Windows 7 Pro	Vehicles/Equipment	2017	\$ 818	1.2640	\$ 1,034	
2015 Ford Explorer	Vehicles/Equipment	2017	\$ 26,798	1.2640	\$ 33,873	
Taser International X-26P Yellow ERD Taser	Excluded	2017	\$ 964	1.2640	\$ 1,219	
Taser International X-26P Yellow ERD Taser	Excluded	2017	\$ 964	1.2640	\$ 1,219	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Taser International X-26P Yellow ERD Taser	Excluded	2017	\$ 964	1.2640	\$ 1,219	
Dell Latitude 5480 Laptop w/Windows 10	Vehicles/Equipment	2017	\$ 894	1.2640	\$ 1,130	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
Dell Latitude 5480 Laptop	Vehicles/Equipment	2017	\$ 835	1.2640	\$ 1,055	

Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	RCN	Notes
Dell Latitude 5480 Laptop w/Windows 10	Vehicles/Equipment	2017	\$ 835	1.2640	\$ 1,055	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2017	\$ 850	1.2640	\$ 1,074	
2017 Ford Explorer - PD Interceptor	Vehicles/Equipment	2017	\$ 40,404	1.2640	\$ 51,072	
Axon 6 Bay Docking Station & Desk Plate	Vehicles/Equipment	2017	\$ 1,495	1.2640	\$ 1,890	
Dell Latitude 5480 Laptop	Vehicles/Equipment	2018	\$ 814	1.2265	\$ 998	
2018 Quality Cargo Enclosed Trailer 8.5 x 18	Vehicles/Equipment	2018	\$ 1,298	1.2265	\$ 1,592	
Dell Latitude 5490 Laptop	Vehicles/Equipment	2018	\$ 882	1.2265	\$ 1,082	
Dell Latitude 5490 Laptop	Vehicles/Equipment	2018	\$ 882	1.2265	\$ 1,082	
Dell Latitude 5490 Laptop	Vehicles/Equipment	2018	\$ 882	1.2265	\$ 1,082	
2017 Ford Explorer	Vehicles/Equipment	2018	\$ 40,517	1.2265	\$ 49,693	
2017 Ford Explorer	Vehicles/Equipment	2018	\$ 40,517	1.2265	\$ 49,693	
2018 Ford Explorer	Vehicles/Equipment	2018	\$ 44,225	1.2265	\$ 54,241	
2018 Ford Explorer	Vehicles/Equipment	2018	\$ 44,225	1.2265	\$ 54,241	
2018 Ford Explorer	Vehicles/Equipment	2018	\$ 44,225	1.2265	\$ 54,241	
Wanco Speed Trailer WSDT3-S-PD	Vehicles/Equipment	2018	\$ 11,635	1.2265	\$ 14,270	
Dell Latitude 5480	Vehicles/Equipment	2018	\$ 814	1.2265	\$ 998	
Storage Unit SUV	Vehicles/Equipment	2018	\$ 1,310	1.2265	\$ 1,606	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2019	\$ 850	1.2030	\$ 1,023	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2019	\$ 850	1.2030	\$ 1,023	
2019 Ford Police Interceptor	Vehicles/Equipment	2019	\$ 45,847	1.2030	\$ 55,153	
2019 Ford Police Interceptor	Vehicles/Equipment	2019	\$ 45,847	1.2030	\$ 55,153	
2019 Ford Police Interceptor	Vehicles/Equipment	2019	\$ 45,847	1.2030	\$ 55,153	
2019 Ford Police Interceptor	Vehicles/Equipment	2019	\$ 45,847	1.2030	\$ 55,153	
2019 Ford Police Interceptor	Vehicles/Equipment	2019	\$ 41,031	1.2030	\$ 49,359	
PowerEdge T440 Server	Vehicles/Equipment	2019	\$ 9,632	1.2030	\$ 11,587	
PowerEdge T440 Server	Vehicles/Equipment	2019	\$ 9,632	1.2030	\$ 11,587	
Wheen Justice LED Full Light Bar	Vehicles/Equipment	2019	\$ 1,168	1.2030	\$ 1,405	
Radarsign TC-400 11" LED Modular Battery Power Radar Sign	Vehicles/Equipment	2019	\$ 2,895	1.2030	\$ 3,483	
Radarsign TC-400 11" LED Modular Battery Power Radar Sign	Vehicles/Equipment	2019	\$ 2,895	1.2030	\$ 3,483	
Gen2 Radar Recorder Kit w/Software	Vehicles/Equipment	2019	\$ 3,430	1.2030	\$ 4,126	
TASKalfa 3501i MFP Copy Machine	Excluded	2019	\$ 1,987	1.2030	\$ 2,390	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 850	1.1833	\$ 1,006	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 850	1.1833	\$ 1,006	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 850	1.1833	\$ 1,006	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 850	1.1833	\$ 1,006	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 850	1.1833	\$ 1,006	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	

Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	RCN	Notes
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Safariland HW-2015-10-SB Body Armor Vest	Excluded	2020	\$ 907	1.1833	\$ 1,073	
Ford 2020 Transit Van	Vehicles/Equipment	2020	\$ 42,423	1.1833	\$ 50,199	
Ford 2020 Explorer	Vehicles/Equipment	2020	\$ 49,747	1.1833	\$ 58,865	
22KW Standby Generator	Vehicles/Equipment	2020	\$ 4,795	1.1833	\$ 5,673	
HP Elitebook 840 G6	Vehicles/Equipment	2020	\$ 915	1.1833	\$ 1,082	
Nautilus Barbell Rack	Vehicles/Equipment	2020	\$ 829	1.1833	\$ 981	
Endurance T150 Commercial Treadmill	Vehicles/Equipment	2020	\$ 2,075	1.1833	\$ 2,455	
PCL Counter Balanced Smith Fitness Equipment	Vehicles/Equipment	2020	\$ 1,761	1.1833	\$ 2,084	
PC2 - Assist Chin Dip Fitness Equipment	Vehicles/Equipment	2020	\$ 2,290	1.1833	\$ 2,710	
PRO Clubline SPR1000 w/Rear Extension Fitness Equip	Vehicles/Equipment	2020	\$ 1,135	1.1833	\$ 1,343	
Body-Solid GDCC200 Functional Trainer Fitness Equip	Vehicles/Equipment	2020	\$ 1,650	1.1833	\$ 1,952	
PC2-Pec Fly/Rear Delts Fitness Equipment	Vehicles/Equipment	2020	\$ 1,891	1.1833	\$ 2,238	
PC2-Lat Pull/Row	Vehicles/Equipment	2020	\$ 1,891	1.1833	\$ 2,238	
Camera System - Impound Yard	Vehicles/Equipment	2021	\$ 1,068	1.1185	\$ 1,195	
ZOLL AED Plus w/PASS Cover	Vehicles/Equipment	2021	\$ 1,295	1.1185	\$ 1,448	
ZOLL AED Plus w/PASS Cover	Vehicles/Equipment	2021	\$ 1,295	1.1185	\$ 1,448	
ZOLL AED Plus w/PASS Cover	Vehicles/Equipment	2021	\$ 1,295	1.1185	\$ 1,448	
ZOLL AED Plus w/PASS Cover	Vehicles/Equipment	2021	\$ 1,295	1.1185	\$ 1,448	
ZOLL AED Plus w/PASS Cover	Vehicles/Equipment	2021	\$ 1,295	1.1185	\$ 1,448	
ZOLL AED Plus w/PASS Cover	Vehicles/Equipment	2021	\$ 1,295	1.1185	\$ 1,448	
ZOLL AED Plus w/PASS Cover	Vehicles/Equipment	2021	\$ 1,295	1.1185	\$ 1,448	
Dell Latitude 3551 Laptop	Vehicles/Equipment	2021	\$ 1,087	1.1185	\$ 1,215	
Ver-mac Speed Trailer	Vehicles/Equipment	2021	\$ 20,400	1.1185	\$ 22,817	
2021 Ford Explorer	Vehicles/Equipment	2021	\$ 40,606	1.1185	\$ 45,417	
2021 Ford Explorer	Vehicles/Equipment	2021	\$ 41,644	1.1185	\$ 46,578	
2021 Ford Police Interceptor	Vehicles/Equipment	2021	\$ 48,532	1.1185	\$ 54,282	
Camera System - patrol vehicle	Vehicles/Equipment	2022	\$ 6,340	1.0434	\$ 6,615	
Camera System - patrol vehicle	Vehicles/Equipment	2022	\$ 6,340	1.0434	\$ 6,615	
Camera System - patrol vehicle	Vehicles/Equipment	2022	\$ 6,340	1.0434	\$ 6,615	
Camera System - patrol vehicle	Vehicles/Equipment	2022	\$ 6,340	1.0434	\$ 6,615	
Camera System - patrol vehicle	Vehicles/Equipment	2022	\$ 6,340	1.0434	\$ 6,615	
Camera System - patrol vehicle	Vehicles/Equipment	2022	\$ 6,340	1.0434	\$ 6,615	
Camera System - patrol vehicle	Vehicles/Equipment	2022	\$ 6,340	1.0434	\$ 6,615	
2022 Ford Explorer	Vehicles/Equipment	2022	\$ 39,776	1.0434	\$ 41,502	
2022 Ford Explorer	Vehicles/Equipment	2022	\$ 48,471	1.0434	\$ 50,574	
2022 Ford Explorer	Vehicles/Equipment	2022	\$ 48,471	1.0434	\$ 50,574	
2022 Ford Explorer	Vehicles/Equipment	2022	\$ 48,471	1.0434	\$ 50,574	
2022 Ford Explorer	Vehicles/Equipment	2022	\$ 48,471	1.0434	\$ 50,574	
2022 Ford Explorer	Vehicles/Equipment	2022	\$ 48,307	1.0434	\$ 50,403	
2022 Ford Explorer	Vehicles/Equipment	2022	\$ 48,307	1.0434	\$ 50,403	
2022 Ford Explorer	Vehicles/Equipment	2022	\$ 48,162	1.0434	\$ 50,252	
2022 Gas EFI Quietech	Vehicles/Equipment	2022	\$ 14,995	1.0434	\$ 15,646	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	

Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition	ENR			Notes
		Year	Original Cost	Factor	RCN	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107	1.0160	\$ 2,141	
Dell Latitude 5430 Rugged Laptop	Vehicles/Equipment	2023	\$ 2,107			

Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	RCN	Notes
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 805	1.0000	\$ 805	
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 805	1.0000	\$ 805	
16 Bay Rackstation Synology	Vehicles/Equipment	2024	\$ 8,506	1.0000	\$ 8,506	
In-Car Video System	Vehicles/Equipment	2024	\$ 26,880	1.0000	\$ 26,880	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 50,340	1.0000	\$ 50,340	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 68,047	1.0000	\$ 68,047	
2024 Ford Explorer	Vehicles/Equipment	2024	\$ 40,872	1.0000	\$ 40,872	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2024 Ford Explorer	Vehicles/Equipment	2024	\$ 40,872	1.0000	\$ 40,872	
2024 Ford Explorer	Vehicles/Equipment	2024	\$ 40,872	1.0000	\$ 40,872	
In-Car Video System (5 add'l units)	Vehicles/Equipment	2024	\$ 8,561	1.0000	\$ 8,561	
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 1,011	1.0000	\$ 1,011	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor 7010	Vehicles/Equipment	2024	\$ 741	1.0000	\$ 741	
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 805	1.0000	\$ 805	
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 805	1.0000	\$ 805	
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 805	1.0000	\$ 805	
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 805	1.0000	\$ 805	
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 805	1.0000	\$ 805	
OptiPlex Small Form Factor Plus 7010	Vehicles/Equipment	2024	\$ 805	1.0000	\$ 805	
16 Bay Rackstation Synology	Vehicles/Equipment	2024	\$ 8,506	1.0000	\$ 8,506	
In-Car Video System	Vehicles/Equipment	2024	\$ 26,880	1.0000	\$ 26,880	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	

Law Enforcement Fixed Assets

Schedule 1

Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	RCN	Notes
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 61,831	1.0000	\$ 61,831	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 50,340	1.0000	\$ 50,340	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 68,047	1.0000	\$ 68,047	
2024 Ford Explorer	Vehicles/Equipment	2024	\$ 40,872	1.0000	\$ 40,872	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2023 Ford Explorer	Vehicles/Equipment	2024	\$ 60,547	1.0000	\$ 60,547	
2024 Ford Explorer	Vehicles/Equipment	2024	\$ 40,872	1.0000	\$ 40,872	
2024 Ford Explorer	Vehicles/Equipment	2024	\$ 40,872	1.0000	\$ 40,872	
In-Car Video System (5 add'l units)	Vehicles/Equipment	2024	\$ 8,561	1.0000	\$ 8,561	
			\$ 12,929,272		\$ 14,486,548	

Recreation Fixed Assets Listing

Schedule 2

Asset #	Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	Current Year Cost	Notes
	LAND						
G06C092	Vacant Lot & Playground - Off of Maddox Street	Land	1971	\$ 1,000	8.5840	\$ 1,000	
G06D126	605 Wilson Street - Clarke Park Playground - Meadowlane	Land	0	\$ 250	0.0000	\$ 250	
G06F027	101 Martin Luther King Jr Ave - Lot	Land	2002	\$ 42,500	2.0758	\$ 42,500	
G07-043	Martin Luther King Park	Land	0	\$ 100	0.0000	\$ 100	
G07-044	700 Walker Road - King Park Court	Land	2010	\$ 150,000	1.5418	\$ 150,000	
G08-004	6844 Powell Road - Millenium Park	Land	2002	\$ 125,000	2.0758	\$ 125,000	
G08-00S	6844 Powell Road - Millenium Park	Land	2000	\$ -	2.1815	\$ -	
G08-018	6500 Powell Road - Parks & Recreation Community Center	Land	2001	\$ -	2.1426	\$ -	
G08-039	4947 CR 144 - Dog Park	Land	2001	\$ 15,000	2.1426	\$ 15,000	
G08-047	ROW - Off of Huey Street and Powell Road	Land	2001	\$ 1,000	2.1426	\$ 1,000	
G08-087	Vacant Lot - Millenium Park	Land	2002	\$ 125,000	2.0758	\$ 125,000	
G08A008	Parks & Recreation Barn off of Coburn Street	Land	2000	\$ 37,500	2.1815	\$ 37,500	
G08A009	1103 Coburn Street - ROW and Easement	Land	2017	\$ 100	1.2640	\$ 100	
G08A100	1202 Coburn Street - Parks & Rec Barn Area	Land	2000	\$ 155,000	2.1815	\$ 155,000	
G15-002	6106 C-44A, Wildwood (Baker House)	Land	2012	\$ 100	1.4580	\$ 100	
G15-009	5300 CR 155 - Lake Deaton Boat Ramp Area	Land	2009	\$ 100	1.5836	\$ 100	
G15-035	5103 CR 155, Wildwood - Lake Deaton	Land	2009	\$ 100	1.5836	\$ 100	
G15-045	Off of Wesleyan Way - Lake Deaton	Land	2009	\$ 100	1.5836	\$ 100	
	Buildings						
Bldg. 18	Concession Stand	Building	1996	\$ 9,381	2.4148	\$ 22,653	
Bldg. 31	Dugouts	Building	1991	\$ 1,890	2.8069	\$ 5,305	
Bldg. 37	Gazebo	Building	1995	\$ 28,941	2.4806	\$ 71,791	
Bldg. 19	Dugouts	Building	1989	\$ 1,890	2.9407	\$ 5,558	
Bldg.. 20	Community Center (new Library)	Building	1992	\$ 162,750	2.7224	\$ -	Not related to Park/Rec
0	Library (New Renovations)	Building	2004	\$ 99,666	1.9074	\$ -	Not related to Park/Rec
Bldg. 23	Senior Citizens Building	Building	1984	\$ 68,250	3.2718	\$ 223,298	
Bldg. 25	Day Care Center - Jackson St. Police	Building	1986	\$ 89,250	3.1598	\$ 282,011	Not related to Park/Rec
Bldg. 62	Emergency Shelter/Community Center	Building	2003	\$ 2,992,992	2.0271	\$ -	Not related to Park/Rec
Bldg. 63	Steel Building (Emergency Shelter)	Building	2004	\$ 21,417	1.9074	\$ -	Not related to Park/Rec
BLDG72	Press Box - Millennium Park	Building	2004	\$ 5,186	1.9074	\$ 9,892	
BLDG73	Metal Building - Millennium Park	Building	2005	\$ 13,700	1.8226	\$ -	Not related to Park/Rec
0	Fencing - Millennium Park	Building	2005	\$ 19,890	1.8226	\$ -	Not related to Park/Rec
0	Sports Lighting - Millennium Park	Building	2005	\$ 56,229	1.8226	\$ -	Not related to Park/Rec
0	Keyed Entrance Pad - Library	Building	2007	\$ 2,650	1.7034	\$ 4,514	
	Concession Press Box - Millennium Park	Building	2007	\$ 2,500	1.7034	\$ 4,259	
BLDG74	Bathrooms - Millennium Park (FRDAP)	Building	2007	\$ 50,446	1.7034	\$ 85,932	
BLDG75	Bathrooms - Pavillion - MLK	Building	2007	\$ 75,628	1.7034	\$ 128,828	
0	Library (New Carpet)	Building	2008	\$ 9,187	1.6331	\$ 15,004	
BLDG76	Concession/Press Box	Building	2008	\$ 319,459	1.6331	\$ 521,717	
0	Fence/Millennium Park	Building	2010	\$ 19,847	1.5418	\$ 30,600	
0	Tot Lot - High Street	Building	2011	\$ 1,780	1.4963	\$ 2,663	
0	Senior Citizens Building	Building	2011	\$ 7,817	1.4963	\$ 11,697	
0	Millennium Pk SB Field Improvements	Building	2011	\$ 2,041	1.4963	\$ 3,053	
0	Millennium Park Fencing	Building	2011	\$ 1,608	1.4963	\$ 2,405	
0	Folding Banquet Tables (3)	Building	2011	\$ 1,143	1.4963	\$ 1,710	
0	Oxford Doors	Building	2013	\$ 10,487	1.4216	\$ 14,908	
0	Exterior Painting Oxford Building	Building	2015	\$ 1,500	1.3530	\$ 2,029	
0	Sod Millennium Park	Building	2015	\$ 2,352	1.3530	\$ 3,182	
0	Blinds Oxford Community Center	Building	2015	\$ 1,350	1.3530	\$ 1,826	

Recreation Fixed Assets Listing

Schedule 2

Asset #	Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	Current Year Cost	Notes
0	Basketball Court Millennium Park	Building	2015	\$ 17,700	1.3530	\$ 23,947	
0	Roof Oxford Community Center	Building	2015	\$ 1,989	1.3530	\$ 2,691	
0	Basketball Court Millennium Park	Building	2015	\$ 1,312	1.3530	\$ 1,775	
0	Fence and Post Dog Park	Building	2015	\$ 2,184	1.3530	\$ 2,955	
0	Baker House Roof	Building	2016	\$ 28,424	1.3127	\$ 37,311	
0	Flooring - Oxford CC	Building	2016	\$ 12,496	1.3127	\$ 16,403	
0	Oxford CC Air Conditioning	Building	2017	\$ 7,537	1.2640	\$ 9,527	
0	Flooring - WWCC - Imp Fees	Building	2017	\$ 49,305	1.2640	\$ 62,323	
0	WWCC Sound System Upgrade-Imp Fees	Building	2017	\$ 27,497	1.2640	\$ 34,757	
0	Jackson St Building Rehab	Building	2022	\$ 86,590	1.0434	\$ 90,348	
0	Lake Deaton Restrooms	Building	2022	\$ 114,449	1.0434	\$ 119,416	
0	Millennium Park Storage Barn	Building	2022	\$ 7,070	1.0434	\$ 7,376	
0	MLK Concession Stand	Building	2023	\$ 269,618	1.0160	\$ 273,922	
0	Baker House Restrooms	Building	2023	\$ 179,183	1.0160	\$ 182,044	
0	Adult Center Roof Replacement(4th St Building)	Building	2023	\$ 15,590	1.0160	\$ 15,839	
	Equipment						
710013	Mower	Equipment/Vehicles	1994	\$ 2,398	2.5095	\$ 6,018	
710025	Trailer	Equipment/Vehicles	1996	\$ 2,350	2.4148	\$ 5,675	
710007	Mower	Equipment/Vehicles	1997	\$ 5,699	2.3294	\$ 13,275	
710015	Mower	Equipment/Vehicles	1997	\$ 1,333	2.3294	\$ 3,104	
710014	Bushhog RTN60 Tiller	Equipment/Vehicles	1997	\$ 2,118	2.3294	\$ 4,934	
720147	Tidal Wave	Equipment/Vehicles	1998	\$ 1,724	2.2924	\$ 3,952	
720146	Space Whirl	Equipment/Vehicles	1998	\$ 2,367	2.2924	\$ 5,426	
720140	PowerScape Swing	Equipment/Vehicles	1998	\$ 1,324	2.2924	\$ 3,035	
720142	Star Gazer	Equipment/Vehicles	1998	\$ 1,300	2.2924	\$ 2,980	
720141	Buck A Bout	Equipment/Vehicles	1998	\$ 825	2.2924	\$ 1,891	
720139	Powerscape Swing	Equipment/Vehicles	1998	\$ 853	2.2924	\$ 1,955	
710005	Utility Vehicle	Equipment/Vehicles	1999	\$ 1,700	2.2399	\$ 3,808	
720150	Trailer	Equipment/Vehicles	1999	\$ 850	2.2399	\$ 1,904	
720149	Trailer	Equipment/Vehicles	1999	\$ 850	2.2399	\$ 1,904	
710009	KubotaTractor - Model #M40305	Equipment/Vehicles	2001	\$ 13,000	2.1426	\$ 27,854	
710008	Mower	Equipment/Vehicles	2001	\$ 6,000	2.1426	\$ 12,856	
750100	Air Wrench	Equipment/Vehicles	2002	\$ 1,000	2.0758	\$ 2,076	
710021	Pressure Washer	Equipment/Vehicles	2002	\$ 1,900	2.0758	\$ 3,944	
710017	Lesco Spreader	Equipment/Vehicles	2002	\$ 1,499	2.0758	\$ 3,112	
710047	Mower	Equipment/Vehicles	2002	\$ 1,678	2.0758	\$ 3,483	
720101	Mower	Equipment/Vehicles	2003	\$ 23,053	2.0271	\$ 46,729	
720104	Edger	Equipment/Vehicles	2003	\$ 1,382	2.0271	\$ 2,801	
750104	Ice Maker	Equipment/Vehicles	2003	\$ 2,339	2.0271	\$ 4,740	
750106	Floor Scrubber	Equipment/Vehicles	2003	\$ 3,465	2.0271	\$ 7,024	
750107	Floor Machine	Equipment/Vehicles	2003	\$ 849	2.0271	\$ 1,721	
750103	Tables	Equipment/Vehicles	2003	\$ 2,641	2.0271	\$ 5,354	
750102	Chairs	Equipment/Vehicles	2003	\$ 10,168	2.0271	\$ 20,610	
720151	Sandpro	Equipment/Vehicles	2004	\$ 8,807	1.9074	\$ 16,799	
720162	Groomer	Equipment/Vehicles	2004	\$ 2,468	1.9074	\$ 4,708	
710141	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710144	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710142	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710143	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710150	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	

Recreation Fixed Assets Listing

Schedule 2

Asset #	Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	Current Year Cost	Notes
710146	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710149	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710147	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710148	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710156	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710152	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710151	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710155	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710153	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710154	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710157	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
710145	Workstation	Equipment/Vehicles	2004	\$ 1,065	1.9074	\$ 2,032	
75	Gel Battery & Floor	Equipment/Vehicles	2004	\$ 4,927	1.9074	\$ 9,398	
720168	Toro 22 HP Rake-O-Vac	Equipment/Vehicles	2005	\$ 26,638	1.8226	\$ 48,551	
750153	TABLES/68	Equipment/Vehicles	2005	\$ 2,881	1.8226	\$ 5,251	
750155	SOUND SYSTEM	Equipment/Vehicles	2005	\$ 11,255	1.8226	\$ 20,514	
720215	WESCOTURF MOWER	Equipment/Vehicles	2006	\$ 6,766	1.7514	\$ 11,850	
0	LARGE WOOD DISPLAY CASE	Equipment/Vehicles	2006	\$ 880	1.7514	\$ 1,541	
720233	BATTING TUNNEL FRAME	Equipment/Vehicles	2006	\$ 2,435	1.7514	\$ 4,265	
720234	BATTING TUNNEL FRAME	Equipment/Vehicles	2006	\$ 2,435	1.7514	\$ 4,265	
FRDAP GRANT	PLAY GROUND EQUIPMENT	Equipment/Vehicles	2006	\$ 128,595	1.7514	\$ 225,216	
MILLEN PARK	PLAY GroUND EQUIPMENT	Equipment/Vehicles	2006	\$ 26,535	1.7514	\$ 46,472	
0	Computer station-Casey	Equipment/Vehicles	2007	\$ 1,166	1.7034	\$ 1,987	
FRDAP GRANT MLKING	Park Playground Equipment	Equipment/Vehicles	2007	\$ 86,062	1.7034	\$ 146,601	
0	Table-Martin Luther King Park	Equipment/Vehicles	2007	\$ 924	1.7034	\$ 1,574	
0	Shelving for Van	Equipment/Vehicles	2007	\$ 939	1.7034	\$ 1,599	
750161	2007 Chevy Cargo Van	Equipment/Vehicles	2007	\$ 14,498	1.7034	\$ 24,696	
0	Security cameras/P&R	Equipment/Vehicles	2008	\$ 1,122	1.6331	\$ 1,832	
0	Flowers	Equipment/Vehicles	2008	\$ 978	1.6331	\$ 1,597	
0	Fencing	Equipment/Vehicles	2008	\$ 1,633	1.6331	\$ 2,667	
0	Electric Panel-Storm Shelter	Equipment/Vehicles	2008	\$ 2,685	1.6331	\$ 4,385	
0	BATHROOM/FENCING/MLK	Equipment/Vehicles	2008	\$ 62,049	1.6331	\$ 101,334	
0	Ride on Magnum	Equipment/Vehicles	2008	\$ 6,245	1.6331	\$ 10,199	
720269	2008 Chevy Silverado	Equipment/Vehicles	2008	\$ 16,435	1.6331	\$ 26,840	
N/A	Sod	Equipment/Vehicles	2008	\$ 976	1.6331	\$ 1,594	
0	Bike Rack-P&R	Equipment/Vehicles	2008	\$ 925	1.6331	\$ 1,511	
720282	HOT DOG ROLLER	Equipment/Vehicles	2009	\$ 995	1.5836	\$ 1,576	
720268	Triple Crown Utility Trailer 6 x 16	Equipment/Vehicles	2009	\$ 1,454	1.5836	\$ 2,303	
720284	2010 Ford E350 Van	Equipment/Vehicles	2009	\$ 22,687	1.5836	\$ 35,927	
0	Monitor	Equipment/Vehicles	2011	\$ 123	1.4963	\$ 184	
720821	Triple Crown Utility Trailer 6x12	Equipment/Vehicles	2012	\$ 1,565	1.4580	\$ 2,282	
0	Highland Tractor	Equipment/Vehicles	2013	\$ 5,560	1.4216	\$ 7,904	
0	Munn' s Sales & Service	Equipment/Vehicles	2013	\$ 3,934	1.4216	\$ 5,592	
0	Trimmers, Blowers, Chain Saws, Etc	Equipment/Vehicles	2013	\$ 4,923	1.4216	\$ 6,998	
0	MLK A/C	Equipment/Vehicles	2013	\$ 3,934	1.4216	\$ 5,592	

Recreation Fixed Assets Listing

Schedule 2

Asset #	Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	Current Year Cost	Notes
0	4 x 8 Portable Stage	Equipment/Vehicles	2013	\$ 400	1.4216	\$ 569	
59387	2014 Ford F-150 Truck	Equipment/Vehicles	2014	\$ 17,220	1.3839	\$ 23,831	
59386	2014 Ford F-150 Truck	Equipment/Vehicles	2014	\$ 17,220	1.3839	\$ 23,831	
722878	2014 Ford F-150 Truck	Equipment/Vehicles	2014	\$ 19,200	1.3839	\$ 26,571	
N/A	Sand Millennium Park	Equipment/Vehicles	2015	\$ 1,620	1.3530	\$ 2,192	
0	52" Mower	Equipment/Vehicles	2016	\$ 15,038	1.3127	\$ 19,740	
723014	2016 Ford F-150 Pick Up	Equipment/Vehicles	2016	\$ 20,816	1.3127	\$ 27,324	
0	Drop Safe	Equipment/Vehicles	2016	\$ 690	1.3127	\$ 906	
0	AED's for Community Centers (3)	Equipment/Vehicles	2016	\$ 3,693	1.3127	\$ 4,848	
0	Bleacher Covers	Equipment/Vehicles	2016	\$ 20,974	1.3127	\$ 27,532	
0	Aluminum Bleachers	Equipment/Vehicles	2016	\$ 6,773	1.3127	\$ 8,891	
0	(2) 10' 3D Silhouette Christmas Trees	Equipment/Vehicles	2017	\$ 1,720	1.2640	\$ 2,174	
0	Santa Reindeer Team Xmas Dec	Equipment/Vehicles	2017	\$ 1,692	1.2640	\$ 2,139	
0	Elf Express Train Set Xmas Dec.	Equipment/Vehicles	2017	\$ 1,332	1.2640	\$ 1,684	
0	(20) 2-Bay Tilted Dugout Shades	Equipment/Vehicles	2017	\$ 59,265	1.2640	\$ 74,912	
0	Vizio 70" LED TV - WWCC	Equipment/Vehicles	2017	\$ 1,257	1.2640	\$ 1,589	
0	Vizio 70" LED TV - WWCC	Equipment/Vehicles	2017	\$ 1,257	1.2640	\$ 1,589	
0	Vizio 70" LED TV - WWCC	Equipment/Vehicles	2017	\$ 1,257	1.2640	\$ 1,589	
0	HP Computer	Equipment/Vehicles	2017	\$ 767	1.2640	\$ 970	
0	HP Computer	Equipment/Vehicles	2017	\$ 767	1.2640	\$ 970	
0	John Deere FM3012 Mower	Equipment/Vehicles	2017	\$ 11,600	1.2640	\$ 14,663	
330473	2018 Ford Truck	Equipment/Vehicles	2018	\$ 23,908	1.2265	\$ 29,322	
0	2018 Trailer - LTV Vertical Mast Light Tower	Equipment/Vehicles	2019	\$ 9,250	1.2030	\$ 11,128	
0	2019 Trailer - LTV Vertical Mast Light Tower	Equipment/Vehicles	2019	\$ 9,250	1.2030	\$ 11,128	
0	Skag 52" Zero Turn Mower	Equipment/Vehicles	2019	\$ 8,000	1.2030	\$ 9,624	
0	Skag 52" Zero Turn Mower	Equipment/Vehicles	2019	\$ 8,000	1.2030	\$ 9,624	
0	PowerEdge T340 Server	Equipment/Vehicles	2019	\$ 3,364	1.2030	\$ 4,047	
0	Jaypro Classic Club Soccer Goal 8x24	Equipment/Vehicles	2019	\$ 2,087	1.2030	\$ 2,511	
0	Jaypro Classic Club Soccer Goal 7x21	Equipment/Vehicles	2019	\$ 2,012	1.2030	\$ 2,421	
0	2018 Henry Mitchem 2000 Gal 28' Spray Tank & Boom	Equipment/Vehicles	2019	\$ 2,800	1.2030	\$ 3,368	
0	Candelabra Light Stringers/Falling Icicle LED Bulbs	Equipment/Vehicles	2019	\$ 2,000	1.2030	\$ 2,406	
0	3 - Shure BLX Handheld Wireless Mics and 1 Shure 5-Way Antenna	Equipment/Vehicles	2019	\$ 2,448	1.2030	\$ 2,945	
410728	2014 Ford Econoline Van	Equipment/Vehicles	2014	\$ 18,186	1.3839	\$ 25,168	
0	Ice Maker	Equipment/Vehicles	2020	\$ 900	1.1833	\$ 1,065	
0	2019 Ford Fusion Car	Equipment/Vehicles	2020	\$ 19,477	1.1833	\$ 23,047	
0	Power Turf Renovator 60" Sports Machine	Equipment/Vehicles	2020	\$ 12,995	1.1833	\$ 15,377	
0	Scag ZTR Mower - 72"	Equipment/Vehicles	2020	\$ 10,799	1.1833	\$ 12,779	
0	Christmas Tree - 20' RGB Animated	Equipment/Vehicles	2020	\$ 13,000	1.1833	\$ 15,383	
0	Projector, 1080P 5000 Lumen	Equipment/Vehicles	2020	\$ 1,178	1.1833	\$ 1,394	
0	Outdoor Movie Screen	Equipment/Vehicles	2020	\$ 2,684	1.1833	\$ 3,176	
0	Micro Rider (Floor) Scrubber EcoFlex SC2000 20D	Equipment/Vehicles	2020	\$ 8,795	1.1833	\$ 10,407	
0	Cradlepoint 5-yr NetCloud Essentials for Branch Router	Equipment/Vehicles	2020	\$ 1,319	1.1833	\$ 1,560	
0	Scag ZTR Mower	Equipment/Vehicles	2021	\$ 8,619	1.1185	\$ 9,640	
0	Scag ZTR Mower	Equipment/Vehicles	2021	\$ 8,619	1.1185	\$ 9,640	
0	Dell Latitude 3510 Laptop	Equipment/Vehicles	2021	\$ 815	1.1185	\$ 911	
0	Bush Hog 3308	Equipment/Vehicles	2021	\$ 6,650	1.1185	\$ 7,438	
0	2020 John Deere 5055E Tractor	Equipment/Vehicles	2021	\$ 30,450	1.1185	\$ 34,058	
0	PS 4/7 BP OBC Mister-disinfectant mister	Equipment/Vehicles	2021	\$ 1,092	1.1185	\$ 1,221	
0	iStrike Lightning Siren System	Equipment/Vehicles	2022	\$ 7,089	1.0434	\$ 7,397	

Recreation Fixed Assets Listing

Schedule 2

Asset #	Asset Description	Asset Type	Acquisition Year	Original Cost	ENR Factor	Current Year Cost	Notes
0	2021 John Deere Z930M Gas Mower	Equipment/Vehicles	2022	\$ 10,275	1.0434	\$ 10,721	
0	2021 John Deere Z930M Gas Mower	Equipment/Vehicles	2022	\$ 10,275	1.0434	\$ 10,721	
0	2022 Ford F-150	Equipment/Vehicles	2022	\$ 26,581	1.0434	\$ 27,735	
0	2022 Ford Escape	Equipment/Vehicles	2022	\$ 23,705	1.0434	\$ 24,734	
0	Ball Field Windscreens	Equipment/Vehicles	2023	\$ 12,973	1.0160	\$ 13,180	
0	Hexagonal Picnic Table (5)	Equipment/Vehicles	2023	\$ 6,293	1.0160	\$ 6,393	
0	Camera System Wildwood Community Center	Equipment/Vehicles	2023	\$ 14,090	1.0160	\$ 14,315	
0	Security Access System for Wildwood Com Center	Equipment/Vehicles	2023	\$ 6,194	1.0160	\$ 6,293	
0	Toro Sand Pro 3040	Equipment/Vehicles	2023	\$ 24,041	1.0160	\$ 24,424	
0	Toro Multi Pro 1750	Equipment/Vehicles	2023	\$ 44,877	1.0160	\$ 45,593	
0	Toro Groundmaster 3505-D	Equipment/Vehicles	2023	\$ 37,842	1.0160	\$ 38,446	
0	Texas Utility Trailer	Equipment/Vehicles	2023	\$ 5,837	1.0160	\$ 5,930	
0	2022 Ford F350	Equipment/Vehicles	2023	\$ 40,773	1.0160	\$ 41,424	
0	Taskalfa 3554ci	Equipment/Vehicles	2024	\$ 5,380	1.0000	\$ 5,380	
0	Light tower	Equipment/Vehicles	2024	\$ 10,837	1.0000	\$ 10,837	
0	Light tower	Equipment/Vehicles	2024	\$ 10,837	1.0000	\$ 10,837	
0	Light tower	Equipment/Vehicles	2024	\$ 10,837	1.0000	\$ 10,837	
0	Light tower	Equipment/Vehicles	2024	\$ 10,837	1.0000	\$ 10,837	
0	Toro Turf Aerator 687	Equipment/Vehicles	2024	\$ 8,495	1.0000	\$ 8,495	
0	2023 John Deere 3039R Tractor	Equipment/Vehicles	2024	\$ 28,977	1.0000	\$ 28,977	
0	2023 John Deere Q810E Mower	Equipment/Vehicles	2024	\$ 9,275	1.0000	\$ 9,275	
0	2024 Rexedim 1010 Rink Topdresser	Equipment/Vehicles	2024	\$ 15,000	1.0000	\$ 15,000	
	Infrastructure						
	Custom Shade Tilted Dugout (CC Fields)	Building	2017	\$ 59,265	1.2640	\$ 74,912	
	MLK Park Improvements	Building	2021	\$ 416,855	1.1185	\$ 466,244	
	MLK Park Improvements - Impact Fee funded	Building	2021	\$ 1,767,570	1.1185	\$ 1,976,992	
	Splash Pad - MLK Park	Building	2023	\$ 308,181	1.0160	\$ 313,100	
	MLK Park Lighting Upgrade	Building	2023	\$ 60,330	1.0160	\$ 61,293	
	2024 Asset Additions						
	Taskalfa 3554ci	Equipment/Vehicles	2024	\$ 5,380	1.0000	\$ 5,380	
	Light tower	Equipment/Vehicles	2024	\$ 10,837	1.0000	\$ 10,837	
	Light tower	Equipment/Vehicles	2024	\$ 10,837	1.0000	\$ 10,837	
	Light tower	Equipment/Vehicles	2024	\$ 10,837	1.0000	\$ 10,837	
	Light tower	Equipment/Vehicles	2024	\$ 10,837	1.0000	\$ 10,837	
	Turf Aerator 687	Equipment/Vehicles	2024	\$ 8,495	1.0000	\$ 8,495	
	2023 John Deere 3039R Tractor	Equipment/Vehicles	2024	\$ 28,977	1.0000	\$ 28,977	
	John Deere Q810E Mower	Equipment/Vehicles	2024	\$ 9,275	1.0000	\$ 9,275	
	Rexedim Topdresser	Equipment/Vehicles	2024	\$ 15,000	1.0000	\$ 15,000	
					0.0000	\$ -	
	Constuction Work in Progress				0.0000	\$ -	
	Rec Center at MLK	Building	2023	\$ 5,380	1.0160	\$ 5,466	
	Community Center Rehab (P&R office space)	Building	2024	\$ 10,837	1.0000	\$ 10,837	
	Comm Center HVAC Upgrades	Building	2024	\$ 10,837	1.0000	\$ 10,837	
289				\$ 9,688,535		\$ 7,967,871	

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	SEWER PLANT			100%	\$ 330,604	1990	2.87	\$ 948,183	\$ 948,183
	LOWRY		50%	50%	\$ 20,511	1991	2.81	\$ 57,571	\$ 57,571
	I-75 PROJECT		50%	50%	\$ 6,290	1991	2.81	\$ 17,655	\$ 17,655
	PRISON WELLS		100%		\$ 61,500	1994	2.51	\$ 154,345	\$ 154,345
	RAPID INFILTRATION BASINS			100%	\$ 26,000	1995	2.48	\$ 64,493	\$ 64,493
	WILLIAMS/MARTIN LAND - RIBS			100%	\$ 660,563	1996	2.41	\$ 1,594,526	\$ 1,594,526
	WILLIAMS/MARTIN LAND - RIBS			100%	\$ 4,996	1997	2.33	\$ 11,640	\$ 11,640
	RDB PROPERTY		50%	50%	\$ 19,500	2000	2.18	\$ 42,539	\$ 42,539
	UTILITY EASEMENT PARCEL G031-007		50%	50%	\$ 2,200	2000	2.18	\$ 4,799	\$ 4,799
	ADJOINING LAND MAIN ST LIFT STATION			100%	\$ 10,272	2001	2.14	\$ 21,981	\$ 21,981
	CR139		50%	50%	\$ 90,161	2002	2.08	\$ 187,152	\$ 187,152
	CONTINENTAL PARCEL 1 WATER TREATMENT PLANT		100%		\$ 6,900	2016	1.31	\$ 9,057	\$ 9,057
	CONTINENTAL PARCEL 2 - WELL SITE		100%		\$ 15,530	2016	1.31	\$ 20,386	\$ 20,386
	CONTINENTAL PARCEL 3 - WWTF & POND			100%	\$ 12,340	2016	1.31	\$ 16,198	\$ 16,198
	CONTINENTAL PARCEL 4 - SPRAY FIELD			100%	\$ 6,980	2016	1.31	\$ 9,162	\$ 9,162
	CONTINENTAL PARCEL 5 - POND			100%	\$ 22,140	2016	1.31	\$ 29,062	\$ 29,062
	WARFIELD COMPLEX - LAND PORTION	0%			\$ 50,000	2019	1.20	\$ 60,149	\$ 60,149
	UTILITY EASEMENT PARCEL C25-005		50%	50%	\$ 9,210	2022	1.04	\$ 9,610	\$ 9,610
	Buildings	0%			\$ 627,439	1988	3.00	\$ 1,884,301	\$ 1,884,301
	Improvements	0%			\$ 4,181	1995	2.48	\$ 10,371	\$ 10,371
	Improvements	0%			\$ 36,080	1996	2.41	\$ 87,093	\$ 87,093
	Improvements	0%			\$ 28,328	1997	2.33	\$ 65,999	\$ 65,999
	Improvements	0%			\$ 2,362	1998	2.29	\$ 5,414	\$ 5,414
	3 Shell Building Carports	0%			\$ 4,000	2000	2.18	\$ 8,726	\$ 8,726
	Wastewater Treatment Plant Office			100%	\$ 70,945	2004	1.91	\$ 135,320	\$ 135,320
	New Air Conditioning Unit WWTP			100%	\$ 9,398	2010	1.54	\$ 14,495	\$ 14,495
	Superior Shed - 14X30	0%			\$ 6,000	2012	1.46	\$ 8,748	\$ 8,748
	Warfield Complex	0%			\$ 1,650,000	2019	1.20	\$ 1,984,915	\$ 1,984,915
	Metal Storage Building - Warfield Complex	0%			\$ 155,325	2023	1.02	\$ 157,805	\$ 157,805
	Metal Roof Installation - Polymer Storage Room	0%			\$ 13,911	2023	1.02	\$ 14,133	\$ 14,133
	New HVAC split system - WWTP			100%	\$ 11,450	2024	1.00	\$ 11,450	\$ 11,450
	Fences	0%			\$ 1,345	1990	2.87	\$ 3,858	\$ 3,858
	Wells (2)		100%		\$ 13,150	1991	2.81	\$ 36,910	\$ 36,910
	Paving Water Tower Road		100%		\$ 3,100	2000	2.18	\$ 6,763	\$ 6,763
	Lift Station Fencing			100%	\$ 4,692	2000	2.18	\$ 10,236	\$ 10,236
	Water Treatment Plant		100%		\$ 2,626,649	1988	3.00	\$ 7,888,253	\$ 7,888,253
	Water Tank		100%		\$ 868,628	1988	3.00	\$ 2,608,631	\$ 2,608,631
	Lift Station			100%	\$ 413,294	1991	2.81	\$ 1,160,049	\$ 1,160,049
	Sewer Line Improvements			100%	\$ 136,980	1991	2.81	\$ 384,480	\$ 384,480
	I-75 Project		50%	50%	\$ 1,333,562	1994	2.51	\$ 3,346,810	\$ 3,346,810
	CR 466A Water Main		100%		\$ 60,660	1994	2.51	\$ 152,237	\$ 152,237
	Youth Challenge Project		50%	50%	\$ 22,293	1994	2.51	\$ 55,948	\$ 55,948
	Container Corporation Extension		50%	50%	\$ 9,885	1994	2.51	\$ 24,808	\$ 24,808
	Dairyman's Extension		50%	50%	\$ 39,214	1992	2.72	\$ 106,761	\$ 106,761
	Walker Road Exit		50%	50%	\$ 2,859	1992	2.72	\$ 7,784	\$ 7,784
	Misc. Sewer Lines			100%	\$ 1,784	1992	2.72	\$ 4,857	\$ 4,857
	Oak Grove Water Main		100%		\$ 223	1992	2.72	\$ 607	\$ 607
	Pipe & Fittings		50%	50%	\$ 35,432	1994	2.51	\$ 88,923	\$ 88,923
	Clay Drain Road- Gravel Sewer Extension			100%	\$ 15,741	1994	2.51	\$ 39,505	\$ 39,505
	Sludge Treatment			100%	\$ 11,602	1994	2.51	\$ 29,117	\$ 29,117
	Wetlands Project		50%	50%	\$ 101,814	1994	2.51	\$ 255,520	\$ 255,520
	Water Loop		100%		\$ 13,304	1994	2.51	\$ 33,389	\$ 33,389
	Prison Project		50%	50%	\$ 3,339,194	1995	2.48	\$ 8,282,907	\$ 8,282,907
	Ohahumpka Plaza Project		50%	50%	\$ 444,899	1995	2.48	\$ 1,103,577	\$ 1,103,577

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	Effluent Reuse			100%	\$ 3,143,478	1995	2.48	\$ 7,797,432	\$ 7,797,432
	Osceola Lift Station			100%	\$ 87,624	1995	2.48	\$ 217,352	\$ 217,352
	West Potable Water Well		100%		\$ 194,898	1996	2.41	\$ 470,462	\$ 470,462
	Oak Street Lift Station			100%	\$ 30,641	1996	2.41	\$ 73,964	\$ 73,964
	Public Works Barn - Fuel Tank	0%			\$ 7,613	1997	2.33	\$ 17,737	\$ 17,737
	Pipe & Fittings		50%	50%	\$ 8,774	1997	2.33	\$ 20,442	\$ 20,442
	Rapid Infiltration Basin			100%	\$ 830,466	1997	2.33	\$ 1,934,821	\$ 1,934,821
	CDBG Southwest Improvements		50%	50%	\$ 453,300	1997	2.33	\$ 1,056,099	\$ 1,056,099
	West Potable Water Well		100%		\$ 172,505	1997	2.33	\$ 401,902	\$ 401,902
	State Road 44 Project		50%	50%	\$ 71,862	1997	2.33	\$ 167,424	\$ 167,424
	Reuse Holding Pond		50%	50%	\$ 75	1997	2.33	\$ 175	\$ 175
	Renovation of Water Tower		100%		\$ 17,500	1998	2.29	\$ 40,115	\$ 40,115
	West Potable Water Well		100%		\$ 955	1998	2.29	\$ 2,189	\$ 2,189
	State Road 44 Project		50%	50%	\$ 4,408	1998	2.29	\$ 10,104	\$ 10,104
	Concrete/Fiber Mesh		50%	50%	\$ 674	1998	2.29	\$ 1,545	\$ 1,545
	CR219 Bypass Project		50%	50%	\$ 1,351	1998	2.29	\$ 3,097	\$ 3,097
	Probe Rods/Megalugs/Valves		50%	50%	\$ 8,106	1998	2.29	\$ 18,581	\$ 18,581
	Enclose I-75 Lift Station			100%	\$ 1,467	1998	2.29	\$ 3,363	\$ 3,363
	Playground Project		50%	50%	\$ 1,557	1998	2.29	\$ 3,569	\$ 3,569
	Service Main Street Lift Station/RIB's			100%	\$ 1,705	1998	2.29	\$ 3,908	\$ 3,908
	Clamps/Pipes/Tees/Couplings		50%	50%	\$ 6,363	1998	2.29	\$ 14,586	\$ 14,586
	Rehab CR 468 Lift Station			100%	\$ 11,508	1998	2.29	\$ 26,380	\$ 26,380
	Effluent Disp/Manholes 301			100%	\$ 11,400	1998	2.29	\$ 26,132	\$ 26,132
	WWTP Expansion			100%	\$ 2,518,891	1998	2.29	\$ 5,774,019	\$ 5,774,019
	Water Department Improvements		100%		\$ 7,341	1999	2.24	\$ 16,441	\$ 16,441
	Charlotte Pipe Project			100%	\$ 129,731	1999	2.24	\$ 290,555	\$ 290,555
	Eckerds Project			100%	\$ 3,040	1999	2.24	\$ 6,809	\$ 6,809
	Lift Station Improvements			100%	\$ 6,395	1999	2.24	\$ 14,323	\$ 14,323
	Osceola & Gilliam Force Main			100%	\$ 1,317	1999	2.24	\$ 2,950	\$ 2,950
	Effluent Disp/Gibbs			100%	\$ 39,354	1999	2.24	\$ 88,140	\$ 88,140
	Telemetry Station at 2 Lift Stations			100%	\$ 11,159	2000	2.18	\$ 24,343	\$ 24,343
	Wet Well Project		100%		\$ 35,684	2000	2.18	\$ 77,844	\$ 77,844
	JC McCormick Property		50%	50%	\$ 17,423	2000	2.18	\$ 38,008	\$ 38,008
	Wildwood Estates Project		50%	50%	\$ 223,765	1999	2.24	\$ 501,160	\$ 501,160
	Main Street North Lift Station			100%	\$ 41,473	2001	2.14	\$ 88,747	\$ 88,747
	Coniglio Project		50%	50%	\$ 5,072	2001	2.14	\$ 10,853	\$ 10,853
	The Fairways Project		100%		\$ 129,913	2002	2.08	\$ 269,668	\$ 269,668
	Hook-Up at Prison		100%		\$ 22,169	2002	2.08	\$ 46,017	\$ 46,017
	Stuart Irby Project		50%	50%	\$ 29,033	2002	2.08	\$ 60,265	\$ 60,265
	Wastewater Treatment Plant Filter			100%	\$ 250,737	2002	2.08	\$ 520,469	\$ 520,469
	Wastewater Treatment Plant Generator			100%	\$ 135,962	2002	2.08	\$ 282,224	\$ 282,224
	Homes in Partnership		50%	50%	\$ 14,986	2002	2.08	\$ 31,107	\$ 31,107
	Dublin Investments Property		50%	50%	\$ 11,955	2003	2.03	\$ 24,235	\$ 24,235
	Millenium Project		50%	50%	\$ 445,024	2003	2.03	\$ 902,155	\$ 902,155
	Business Park SR44		50%	50%	\$ 53,316	2003	2.03	\$ 108,082	\$ 108,082
	CR 501 Prison Expansion		100%		\$ 345,269	2003	2.03	\$ 699,931	\$ 699,931
	East SR 44		50%	50%	\$ 146,222	2003	2.03	\$ 296,422	\$ 296,422
	Pine Grove		100%		\$ 17,710	2003	2.03	\$ 35,902	\$ 35,902
	Hideaway MH Park Project		50%	50%	\$ 28,719	2003	2.03	\$ 58,219	\$ 58,219
	CR 501 Storage Tank		100%		\$ 73,130	2004	1.91	\$ 139,488	\$ 139,488
	E/One Liftstations (4)			100%	\$ 6,716	2005	1.82	\$ 12,241	\$ 12,241
	Carolina Carport 22 X 21	0%			\$ 1,605	2005	1.82	\$ 2,925	\$ 2,925
	Carolina Carport 24 X 51	0%			\$ 6,505	2005	1.82	\$ 11,856	\$ 11,856

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	Cathodic Protection - Huey St. Tower		100%		\$ 34,200	2005	1.82	\$ 62,333	\$ 62,333
	Fill Lake Miona Resue Ponds		50%	50%	\$ 46,461	2005	1.82	\$ 84,680	\$ 84,680
	Reuse Lines		50%	50%	\$ 634,048	2006	1.75	\$ 1,110,124	\$ 1,110,124
	Villas @ Lake Miona		50%	50%	\$ 439,022	2006	1.75	\$ 768,662	\$ 768,662
	Master Plan	0%			\$ 85,049	2005	1.82	\$ 155,011	\$ 155,011
	Villas @ Lake Miona		50%	50%	\$ 39,009	2006	1.75	\$ 68,299	\$ 68,299
	North Annexation Improvements		50%	50%	\$ 56,021	2006	1.75	\$ 98,084	\$ 98,084
	Grace Tabernacle Church		50%	50%	\$ 109,649	2006	1.75	\$ 191,979	\$ 191,979
	Down to Earth		50%	50%	\$ 83,647	2006	1.75	\$ 146,453	\$ 146,453
	CR 468 Line Extension		50%	50%	\$ 32,249	2006	1.75	\$ 56,463	\$ 56,463
	Connection/Tie Fee Projects		50%	50%	\$ 35,060	2007	1.70	\$ 59,722	\$ 59,722
	Lake Andrew Preserves		100%		\$ 1,959,167	2007	1.70	\$ 3,337,319	\$ 3,337,319
	WWTP Expansion			100%	\$ 5,836,002	2008	1.63	\$ 9,531,031	\$ 9,531,031
	Miscellaneous Sewer Lines			100%	\$ 96,705	2008	1.63	\$ 157,933	\$ 157,933
	Parkwood Village		50%	50%	\$ 1,053,953	2008	1.63	\$ 1,721,257	\$ 1,721,257
	WWTP Facility Plan			100%	\$ 18,631	2008	1.63	\$ 30,427	\$ 30,427
	Bill Gregory Site Plan		100%		\$ 35,000	2008	1.63	\$ 57,160	\$ 57,160
	Lake Andrew Preserves		50%	50%	\$ 13,930	2008	1.63	\$ 22,750	\$ 22,750
	Reuse Project		50%	50%	\$ 41,986	2009	1.58	\$ 66,488	\$ 66,488
	Westwell Relocation		100%		\$ 63,484	2010	1.54	\$ 97,917	\$ 97,917
	CR 462/139 Line Extension		50%	50%	\$ 332,190	2010	1.54	\$ 512,364	\$ 512,364
	CR 139/CR 466A Line Extension		50%	50%	\$ 39,697	2010	1.54	\$ 61,227	\$ 61,227
	CR 114 Repump Station			100%	\$ 927,222	2010	1.54	\$ 1,430,131	\$ 1,430,131
	New Tower PD		50%	50%	\$ 47,768	2010	1.54	\$ 73,676	\$ 73,676
	St Vincent DePaul Church		50%	50%	\$ 64,048	2010	1.54	\$ 98,787	\$ 98,787
	Legacy Park		50%	50%	\$ 117,396	2010	1.54	\$ 181,069	\$ 181,069
	FL Turnpike PD & East Utility Cooridor		50%	50%	\$ 750	2011	1.50	\$ 1,122	\$ 1,122
	HVAC System	0%			\$ 201,073	2012	1.46	\$ 293,164	\$ 293,164
	CSX Utility Relocates		50%	50%	\$ 123,448	2012	1.46	\$ 179,986	\$ 179,986
	Oxford Assembly of God Church		50%	50%	\$ 156,074	2012	1.46	\$ 227,556	\$ 227,556
	Homes in Partnership / 5th St Project		50%	50%	\$ 55,786	2012	1.46	\$ 81,336	\$ 81,336
	FDOT Bridge Over CSX/301/widening		50%	50%	\$ 48,645	2012	1.46	\$ 70,925	\$ 70,925
	North Well Development		100%		\$ 42,481	2012	1.46	\$ 61,937	\$ 61,937
	Capacity Tracking System		50%	50%	\$ 25,268	2012	1.46	\$ 36,841	\$ 36,841
	Crossing @ Millennium Park		50%	50%	\$ 10,002	2012	1.46	\$ 14,583	\$ 14,583
	Colemans FS Water Main Ext		100%		\$ 52,199	2012	1.46	\$ 76,106	\$ 76,106
	CR 214 Modification Project		50%	50%	\$ 42,726	2012	1.46	\$ 62,294	\$ 62,294
	Champagne Farms Wells		100%		\$ 691,229	2013	1.42	\$ 982,633	\$ 982,633
	Okahumpka Water Main		100%		\$ 151,895	2014	1.38	\$ 210,209	\$ 210,209
	C466A Utility Relocates		50%	50%	\$ 257,674	2015	1.35	\$ 348,447	\$ 348,447
	WWTP Bar Screen/INF Channel (Headworks)			100%	\$ 602,816	2015	1.35	\$ 815,174	\$ 815,174
	Coleman 501 Water Treatment		100%		\$ 1,091,449	2015	1.35	\$ 1,475,941	\$ 1,475,941
	CR 462 Utility Upsizing		100%		\$ 203,659	2015	1.35	\$ 275,403	\$ 275,403
	Hydro Tank		100%		\$ 72,595	2015	1.35	\$ 98,169	\$ 98,169
	C468 Intersection Utility Relocates		100%		\$ 488,216	2015	1.35	\$ 660,203	\$ 660,203
	CR 466A Sumter County Bldg Project		50%	50%	\$ 129,106	2016	1.31	\$ 169,471	\$ 169,471
	Three Flag Sewer System			100%	\$ 5,625	2016	1.31	\$ 7,384	\$ 7,384
	CR 214 Re-Pump Station Improvements			100%	\$ 220,670	2016	1.31	\$ 289,663	\$ 289,663
	Northeast Service Territory		50%	50%	\$ 1,776,862	2016	1.31	\$ 2,332,404	\$ 2,332,404
	Northeast Service Territory -Reimbursement for Overpayment		50%	50%	\$ (11,158)	2017	1.26	\$ (14,103)	\$ (14,103)
	West Well (Ashley Well)		100%		\$ 1,092,379	2016	1.31	\$ 1,433,915	\$ 1,433,915
	Continental C.C. Utility Acquisition & Improvements		50%	50%	\$ 981,787	2016	1.31	\$ 1,288,746	\$ 1,288,746
	C466A (Trailwinds) Utility Relocates		100%		\$ 177,836	2016	1.31	\$ 233,437	\$ 233,437

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	Continental C.C. Utility Improvements		100%		\$ 226,482	2017	1.26	\$ 286,277	\$ 286,277
	C462 Water Line Relocation		100%		\$ 73,821	2017	1.26	\$ 93,311	\$ 93,311
	C466 Water Line Relocation		100%		\$ 311,797	2017	1.26	\$ 394,117	\$ 394,117
	Rosecastle Utility Extension		50%	50%	\$ 145,083	2017	1.26	\$ 183,387	\$ 183,387
	Paint Huey Street Water Tower		100%		\$ 38,083	2017	1.26	\$ 48,138	\$ 48,138
	CR209 Forcemain Extension			100%	\$ 2,124,833	2018	1.23	\$ 2,606,035	\$ 2,606,035
	North (214) Well		100%		\$ 1,404,341	2018	1.23	\$ 1,722,376	\$ 1,722,376
	CR501 Well		100%		\$ 54,639	2018	1.23	\$ 67,013	\$ 67,013
	Police Station Utility Extension		50%	50%	\$ 138,400	2018	1.23	\$ 169,743	\$ 169,743
	Freedom Plaza Extension Project		50%	50%	\$ 57,911	2018	1.23	\$ 71,026	\$ 71,026
	Continental Country Club Water Interconnect		100%		\$ 86,106	2018	1.23	\$ 105,606	\$ 105,606
	Peters Street Lift Station Upgrade			100%	\$ 55,500	2018	1.23	\$ 68,069	\$ 68,069
	CR 501 Water Treatment Plant (408-533-70-7311)		100%		\$ 397,163	2019	1.20	\$ 477,779	\$ 477,779
	CR 501 Forcemain Replacement (407-535-70-7340)			100%	\$ 970,083	2019	1.20	\$ 1,166,990	\$ 1,166,990
	Fairways WTP Upgrades		100%		\$ 44,963	2019	1.20	\$ 54,090	\$ 54,090
	Oxford WTP		100%		\$ 7,331,303	2020	1.18	\$ 8,675,060	\$ 8,675,060
	Odor Control System-CR 209 LS			100%	\$ 81,765	2020	1.18	\$ 96,752	\$ 96,752
	WWTP Phase I Improvements			100%	\$ 930,068	2020	1.18	\$ 1,100,541	\$ 1,100,541
	CR 468 Upgrade-Coleman/Fenney		100%		\$ 596,166	2020	1.18	\$ 705,437	\$ 705,437
	Rib Site Expansion-R-10/R-11 Ponds		50%	50%	\$ 577,147	2020	1.18	\$ 682,932	\$ 682,932
	WWTP Enhancements-PLC Upgrades			100%	\$ 1,065,440	2020	1.18	\$ 1,260,725	\$ 1,260,725
	Hypochlorite Storage Tanks		100%		\$ 60,000	2021	1.12	\$ 67,109	\$ 67,109
	Woodlane Meadows LS #26 Access Road	0%			\$ 72,844	2022	1.04	\$ 76,005	\$ 76,005
	Buena Vista Forcemain Ext			100%	\$ 328,013	2023	1.02	\$ 333,249	\$ 333,249
	CR 209 Water Main Ext		100%		\$ 2,048,204	2023	1.02	\$ 2,080,900	\$ 2,080,900
	Manhole Rings and Covers (66)			100%	\$ 35,404	2023	1.02	\$ 35,969	\$ 35,969
	Houston Polyethylene Tanks-Oxford WTP (2 @ 2,000gal ea)		100%		\$ 66,659	2024	1.00	\$ 66,659	\$ 66,659
	Rehab and Coating 29 manholes			100%	\$ 70,438	2024	1.00	\$ 70,438	\$ 70,438
	Riser Piping Upgrade-St. Clair			100%	\$ 33,598	2024	1.00	\$ 33,598	\$ 33,598
	Riser Piping Upgrade-LS #1			100%	\$ 82,903	2024	1.00	\$ 82,903	\$ 82,903
	LS Control Panel Upgrade (6 LS)			100%	\$ 208,436	2024	1.00	\$ 208,436	\$ 208,436
	Headworks Drum Screen Control Panel	0%			\$ 46,594	2024	1.00	\$ 46,594	\$ 46,594
	Rehab and recoating 27 manholes and 3 LS Wet Wells			100%	\$ 191,611	2024	1.00	\$ 191,611	\$ 191,611
	Wildwood Estates LS Upgrade and relocation			100%	\$ 943,400	2024	1.00	\$ 943,400	\$ 943,400
	Chitty Chatty Utility Bridge Crossing		50%	50%	\$ 162,877	2024	1.00	\$ 162,877	\$ 162,877
	Osceola FM/St.Clair LS Improvements			100%	\$ 431,092	2024	1.00	\$ 431,092	\$ 431,092
	Ashley WTP Upgrades		100%		\$ 732,218	2024	1.00	\$ 732,218	\$ 732,218
	TRACTOR		50%	50%	\$ 14,716	1991	2.81	\$ 41,305	\$ 41,305
	410C JOHN DEERE TRACTOR		50%	50%	\$ 37,960	1993	2.60	\$ 98,872	\$ 98,872
	WETLAND GAUGES		50%	50%	\$ 26,643	1994	2.51	\$ 66,865	\$ 66,865
	INSTALLATION FLOWMETER		50%	50%	\$ 2,643	1995	2.48	\$ 6,556	\$ 6,556
	100KW GENERATOR	0%			\$ 6,000	1995	2.48	\$ 14,883	\$ 14,883
	FLYTE PUMP		50%	50%	\$ 3,833	1995	2.48	\$ 9,508	\$ 9,508
	LIFTMORE CRANE		50%	50%	\$ 3,685	1995	2.48	\$ 9,141	\$ 9,141
	DIGEST/DISTILL APPARATUS		50%	50%	\$ 3,948	1995	2.48	\$ 9,793	\$ 9,793
	TURBIDMETER/APPARATUS		50%	50%	\$ 2,733	1995	2.48	\$ 6,779	\$ 6,779
	PH ANALYZER, SENSOR		50%	50%	\$ 1,513	1995	2.48	\$ 3,753	\$ 3,753
	CL2 WELL MODIFIER		100%		\$ 2,315	1996	2.41	\$ 5,588	\$ 5,588
	REMOTE TERMINAL UNIT		50%	50%	\$ 10,060	1996	2.41	\$ 24,284	\$ 24,284
	AIR CURTAIN INCINERATOR		50%	50%	\$ 143,928	1996	2.41	\$ 347,426	\$ 347,426
	ANALOG & DIGITAL MONITOR M		50%	50%	\$ 3,079	1996	2.41	\$ 7,432	\$ 7,432
	SPECTRPHOTOMETER		50%	50%	\$ 1,535	1996	2.41	\$ 3,705	\$ 3,705
	DIS HARROW/BUSH HOG MOWER		50%	50%	\$ 2,330	1996	2.41	\$ 5,624	\$ 5,624
	TRAILER AND BLADES		50%	50%	\$ 1,175	1996	2.41	\$ 2,836	\$ 2,836

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	HYDRAULIC PUMP		50%	50%	\$ 1,650	1996	2.41	\$ 3,983	\$ 3,983
	TRACTOR		50%	50%	\$ 12,600	1996	2.41	\$ 30,415	\$ 30,415
	RADIO/REPAIRS/PURCHASES		50%	50%	\$ 5,688	1997	2.33	\$ 13,252	\$ 13,252
	Port Fuel Tank & Trailer		50%	50%	\$ 750	1997	2.33	\$ 1,747	\$ 1,747
	VIBRATORY PLATE		50%	50%	\$ 1,766	1997	2.33	\$ 4,114	\$ 4,114
	GENERATORS	0%			\$ 20,700	1997	2.33	\$ 48,227	\$ 48,227
	PUMP/FLOWMETER/MOTOR		50%	50%	\$ 10,193	1997	2.33	\$ 23,748	\$ 23,748
	ANTENNA SYSTEM/TELEMETRY		50%	50%	\$ 1,040	1997	2.33	\$ 2,423	\$ 2,423
	Case Backhoe w/Bucket and Forks		50%	50%	\$ 54,188	1997	2.33	\$ 126,247	\$ 126,247
	AIR CURTAIN INCINERATOR		50%	50%	\$ 3,302	1997	2.33	\$ 7,693	\$ 7,693
	DUAL PEN WITH DISPLAY TOTALIZER		50%	50%	\$ 1,047	1998	2.29	\$ 2,400	\$ 2,400
	MOWER/WEEDEATER/EDGER/RPR/PURCH		50%	50%	\$ 5,686	1998	2.29	\$ 13,034	\$ 13,034
	CONTROL PANEL/PUMPS/ALUM COVER	0%			\$ 50,027	1998	2.29	\$ 114,676	\$ 114,676
	FURNACE/FILTERS/TESTKITS/RECEPT		50%	50%	\$ 1,739	1998	2.29	\$ 3,986	\$ 3,986
	THERMOMETER/TUBING/FORKS/TRIPOD		50%	50%	\$ 2,046	1998	2.29	\$ 4,690	\$ 4,690
	LIGHTING PERIPHERALS/HARDWARE		50%	50%	\$ 11,660	1998	2.29	\$ 26,728	\$ 26,728
	OZONE GENERATOR WITH CABINET	0%			\$ 21,000	1998	2.29	\$ 48,138	\$ 48,138
	TRENCHER		50%	50%	\$ 10,990	1998	2.29	\$ 25,192	\$ 25,192
	Stone Jumpin Jack		50%	50%	\$ 2,307	1998	2.29	\$ 5,288	\$ 5,288
	GAS POWERED UTILITY VEHICLE		50%	50%	\$ 900	1999	2.24	\$ 2,016	\$ 2,016
	CUTOFF SAW		50%	50%	\$ 946	1999	2.24	\$ 2,119	\$ 2,119
	FIRE SUPPRESSION PROJ		50%	50%	\$ 3,446	1999	2.24	\$ 7,718	\$ 7,718
	20HP MOTOR/DRIVE		50%	50%	\$ 1,150	1999	2.24	\$ 2,576	\$ 2,576
	WELLS FARGO UTILITY TRAILER	0%			\$ 2,280	1999	2.24	\$ 5,106	\$ 5,106
	TV CABLE ASSEMBLY, MANHOLE GUIDE		50%	50%	\$ 8,770	1999	2.24	\$ 19,642	\$ 19,642
	VFLOW MASTERFLEX PUMP		50%	50%	\$ 905	1999	2.24	\$ 2,027	\$ 2,027
	PUMP/DEWATERING STATION			100%	\$ 4,436	1999	2.24	\$ 9,935	\$ 9,935
	HACH CLORINE ANALYZER		50%	50%	\$ 2,500	1999	2.24	\$ 5,599	\$ 5,599
	HACH CLORINE ANALYZER		50%	50%	\$ 2,500	1999	2.24	\$ 5,599	\$ 5,599
	HACH TURBIDITY METER		50%	50%	\$ 1,795	1999	2.24	\$ 4,020	\$ 4,020
	ISCO TEMPERATURE MEASURE MODULE		50%	50%	\$ 1,276	1999	2.24	\$ 2,858	\$ 2,858
	ISCO MODEL 6700 PORTABLE SAMPLER		50%	50%	\$ 2,156	1999	2.24	\$ 4,829	\$ 4,829
	LARGE HAVO OVEN		50%	50%	\$ 1,831	1999	2.24	\$ 4,101	\$ 4,101
	SURGE PROTECTOR		50%	50%	\$ 5,885	1999	2.24	\$ 13,180	\$ 13,180
	BLOCK HEATER		50%	50%	\$ 1,200	2000	2.18	\$ 2,618	\$ 2,618
	LT155 LAWN TRACTOR		50%	50%	\$ 1,799	2000	2.18	\$ 3,925	\$ 3,925
	GATE - WATER SEWER PLANT		100%		\$ 3,700	2000	2.18	\$ 8,071	\$ 8,071
	PROSCOUT CAMERA		50%	50%	\$ 2,891	2000	2.18	\$ 6,307	\$ 6,307
	2000 Ford F450 Diesel Crane	0%			\$ 48,809	2000	2.18	\$ 106,475	\$ 106,475
	PORTABLE SAMPLER		50%	50%	\$ 4,203	2000	2.18	\$ 9,169	\$ 9,169
	PORTABLE SAMPLER		50%	50%	\$ 3,009	2000	2.18	\$ 6,564	\$ 6,564
	LEL INSTRUMENT		50%	50%	\$ 2,150	2000	2.18	\$ 4,690	\$ 4,690
	TANK AIR CHANGING SYSTEM		50%	50%	\$ 992	2001	2.14	\$ 2,123	\$ 2,123
	SCADAPACK PLC 16 DIGITAL INPUTS			100%	\$ 4,500	2001	2.14	\$ 9,629	\$ 9,629
	SCADAPACK PLC 16 DIGITAL INPUTS			100%	\$ 4,500	2001	2.14	\$ 9,629	\$ 9,629
	CHLORINATOR AT PRISON		50%	50%	\$ 5,000	2001	2.14	\$ 10,699	\$ 10,699
	Back Pack Radio		50%	50%	\$ 11,000	2001	2.14	\$ 23,539	\$ 23,539
	NES TRENCH SHIELD		50%	50%	\$ 2,450	2001	2.14	\$ 5,243	\$ 5,243
	3660 ZERO TURN MOWER		50%	50%	\$ 5,840	2001	2.14	\$ 12,497	\$ 12,497
	RADIO KIT		50%	50%	\$ 1,485	2001	2.14	\$ 3,178	\$ 3,178
	VT SCADA SYSTEM		50%	50%	\$ 9,995	2001	2.14	\$ 21,388	\$ 21,388
	BASE STATION ANTENNAE		50%	50%	\$ 1,830	2001	2.14	\$ 3,916	\$ 3,916
	SCADA		50%	50%	\$ 1,350	2001	2.14	\$ 2,889	\$ 2,889
	SCADA REMOTE SITE		50%	50%	\$ 5,962	2001	2.14	\$ 12,758	\$ 12,758

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	LANDPRIDE MOWER		50%	50%	\$ 8,300	2001	2.14	\$ 17,761	\$ 17,761
	DELL PENTIUM III		50%	50%	\$ 2,960	2001	2.14	\$ 6,334	\$ 6,334
	2001 BACKHOE CAPITAL LEASE		50%	50%	\$ 57,642	2001	2.14	\$ 123,347	\$ 123,347
	AM832 OFFICE TRAILER/BATH		50%	50%	\$ 2,500	2002	2.08	\$ 5,189	\$ 5,189
	3660M JOHN DEERE 48 BACKHOE		100%		\$ 5,522	2002	2.08	\$ 11,462	\$ 11,462
	SUNSTATE METER		50%	50%	\$ 4,900	2002	2.08	\$ 10,171	\$ 10,171
	460 JOHN DEERE LOADER		50%	50%	\$ 2,872	2002	2.08	\$ 5,962	\$ 5,962
	JOHN DEERE GATOR4 UTILITY VEHICLE		50%	50%	\$ 4,586	2002	2.08	\$ 9,519	\$ 9,519
	SCADA SYSTEM OKAHUMPA WESTWELL		100%		\$ 4,800	2002	2.08	\$ 9,964	\$ 9,964
	SCADA SYSTEM OKAHUMPA WESTWELL		100%		\$ 4,800	2002	2.08	\$ 9,964	\$ 9,964
	CONVAULT		50%	50%	\$ 8,225	2002	2.08	\$ 17,073	\$ 17,073
	TP-L3G PIPE LASER		50%	50%	\$ 6,495	2002	2.08	\$ 13,482	\$ 13,482
	5 SCADA SYSTEMS KING PARK CT		50%	50%	\$ 27,500	2002	2.08	\$ 57,083	\$ 57,083
	20 BY 21 CANOPY		50%	50%	\$ 1,195	2002	2.08	\$ 2,481	\$ 2,481
	20 BY 21 CANOPY		50%	50%	\$ 1,195	2002	2.08	\$ 2,481	\$ 2,481
	2001 Case C90 Tractor		50%	50%	\$ 18,853	2002	2.08	\$ 39,134	\$ 39,134
	MODEL 2020 INCUBATOR		50%	50%	\$ 2,483	2002	2.08	\$ 5,154	\$ 5,154
	27 HP Tiger with 52" Deck		50%	50%	\$ 7,120	2003	2.03	\$ 14,434	\$ 14,434
	2 duplex control panels		50%	50%	\$ 9,645	2003	2.03	\$ 19,552	\$ 19,552
	Sterilizer		50%	50%	\$ 4,470	2003	2.03	\$ 9,062	\$ 9,062
	Scada Pack Controller		50%	50%	\$ 2,740	2003	2.03	\$ 5,555	\$ 5,555
	4-RTU's		50%	50%	\$ 23,340	2003	2.03	\$ 47,315	\$ 47,315
	MV145H Flatplate		50%	50%	\$ 3,263	2003	2.03	\$ 6,615	\$ 6,615
	Tractor & Loader		50%	50%	\$ 20,847	2003	2.03	\$ 42,261	\$ 42,261
	3000 PSI Pressure Washer Ser 77841		50%	50%	\$ 893	2004	1.91	\$ 1,703	\$ 1,703
	4 Aluminum dumpsters		50%	50%	\$ 5,160	2004	1.91	\$ 9,842	\$ 9,842
	2 Front load Alum. Dumpsters		50%	50%	\$ 1,590	2004	1.91	\$ 3,033	\$ 3,033
	Protector hood & blower unit		50%	50%	\$ 5,265	2004	1.91	\$ 10,042	\$ 10,042
	Gator grinder		50%	50%	\$ 4,336	2004	1.91	\$ 8,270	\$ 8,270
	Submersible mixer		50%	50%	\$ 10,043	2004	1.91	\$ 19,156	\$ 19,156
	Grinder pumps			100%	\$ 6,719	2004	1.91	\$ 12,816	\$ 12,816
	Mower		50%	50%	\$ 6,610	2004	1.91	\$ 12,607	\$ 12,607
	Tractor broom & angle kit		50%	50%	\$ 3,668	2004	1.91	\$ 6,996	\$ 6,996
	BACKHOE FORKS		50%	50%	\$ 1,000	2005	1.82	\$ 1,823	\$ 1,823
	SOFTRONICS SOFTSTART		50%	50%	\$ 3,353	2005	1.82	\$ 6,111	\$ 6,111
	SAMPLER-TELEDYNE		50%	50%	\$ 2,607	2005	1.82	\$ 4,752	\$ 4,752
	PRESSURE WASHER		50%	50%	\$ 1,090	2005	1.82	\$ 1,987	\$ 1,987
	HONDA PUMP		50%	50%	\$ 1,912	2005	1.82	\$ 3,485	\$ 3,485
	SAMPLER-TELEDYNE		50%	50%	\$ 4,790	2005	1.82	\$ 8,730	\$ 8,730
	2005 Gilson Cement Mixer		50%	50%	\$ 3,969	2005	1.82	\$ 7,234	\$ 7,234
	SAMPLER-ISCO		50%	50%	\$ 3,880	2005	1.82	\$ 7,072	\$ 7,072
	JOHN DEERE EXCAVATOR		50%	50%	\$ 140,000	2005	1.82	\$ 255,165	\$ 255,165
	SCADA PACK-ENGINEER SERVICE (2)		50%	50%	\$ 13,000	2005	1.82	\$ 23,694	\$ 23,694
	HYDRAULIC SCALE		50%	50%	\$ 1,370	2006	1.75	\$ 2,399	\$ 2,399
	FIELD PROGRAMMER		50%	50%	\$ 1,890	2006	1.75	\$ 3,309	\$ 3,309
	HARDRIVE-WATER DEPT		100%		\$ 880	2006	1.75	\$ 1,541	\$ 1,541
	2006 Triple Crown 6 x 12 Utility Trailer		50%	50%	\$ 999	2006	1.75	\$ 1,749	\$ 1,749
	PUMPS/WATER DEPT (2)		100%		\$ 2,000	2006	1.75	\$ 3,502	\$ 3,502
	SCADA PACK		50%	50%	\$ 7,500	2006	1.75	\$ 13,131	\$ 13,131
	PROBE		50%	50%	\$ 1,050	2006	1.75	\$ 1,838	\$ 1,838
	LOGGING SYSTEMS		50%	50%	\$ 1,600	2006	1.75	\$ 2,801	\$ 2,801
	BACK FLOW TESTER		50%	50%	\$ 1,722	2006	1.75	\$ 3,014	\$ 3,014
	SHELTER		50%	50%	\$ 1,500	2006	1.75	\$ 2,626	\$ 2,626
	SHELTER		50%	50%	\$ 1,500	2006	1.75	\$ 2,626	\$ 2,626

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	CUT QUIK CUT OFF SAW		50%	50%	\$ 895	2006	1.75	\$ 1,567	\$ 1,567
	CANOPY-20X21		50%	50%	\$ 980	2006	1.75	\$ 1,716	\$ 1,716
	CARPORT-18X26		50%	50%	\$ 2,350	2006	1.75	\$ 4,115	\$ 4,115
	TELEMETRY SYSTEM		50%	50%	\$ 19,500	2006	1.75	\$ 34,142	\$ 34,142
	Computer For Trane A/c-City Hall/phys. Environment		50%	50%	\$ 2,863	2007	1.70	\$ 4,876	\$ 4,876
	Mter Upgrade-Fed. Prison-watr		50%	50%	\$ 14,000	2007	1.70	\$ 23,848	\$ 23,848
	SOFTRONICS 60 HP MODEL GP10-water		100%		\$ 1,968	2007	1.70	\$ 3,352	\$ 3,352
	Surge Protector at Prison-water		100%		\$ 4,196	2007	1.70	\$ 7,147	\$ 7,147
	Video /Carmeras @ Prison (2)-water		100%		\$ 11,207	2007	1.70	\$ 19,091	\$ 19,091
	New Gate Opener-water		100%		\$ 1,595	2007	1.70	\$ 2,717	\$ 2,717
	4 mount boxes-side-eater		50%	50%	\$ 760	2007	1.70	\$ 1,295	\$ 1,295
	wiring of new office-water		100%		\$ 1,286	2007	1.70	\$ 2,191	\$ 2,191
	2007 F250- Water Dept		100%		\$ 28,125	2007	1.70	\$ 47,909	\$ 47,909
	2007 Mack Truck-(roll Off Truck)		50%	50%	\$ 114,094	2007	1.70	\$ 194,352	\$ 194,352
	Valve Vault-sewer		50%	50%	\$ 1,945	2007	1.70	\$ 3,313	\$ 3,313
	Computer processor & monitor-sewer		50%	50%	\$ 1,147	2007	1.70	\$ 1,954	\$ 1,954
	scadia Upgrade-sewer		50%	50%	\$ 3,529	2007	1.70	\$ 6,012	\$ 6,012
	computer-sewer		50%	50%	\$ 824	2007	1.70	\$ 1,404	\$ 1,404
	briggs blower-sewer		50%	50%	\$ 895	2007	1.70	\$ 1,525	\$ 1,525
	computer process-sewer		50%	50%	\$ 2,067	2007	1.70	\$ 3,521	\$ 3,521
	Refrigerator		50%	50%	\$ 2,570	2007	1.70	\$ 4,378	\$ 4,378
	Camera server		50%	50%	\$ 2,177	2007	1.70	\$ 3,708	\$ 3,708
	computer-sewer		50%	50%	\$ 2,916	2007	1.70	\$ 4,967	\$ 4,967
	Kubota Cart 4 x 4			100%	\$ 8,995	2007	1.70	\$ 15,322	\$ 15,322
	Pallet Forks-sewer		50%	50%	\$ 850	2007	1.70	\$ 1,448	\$ 1,448
	Telemetry at Rib Site-sewer		50%	50%	\$ 24,900	2007	1.70	\$ 42,416	\$ 42,416
	Bolley-sewer		50%	50%	\$ 2,200	2007	1.70	\$ 3,748	\$ 3,748
	2 Gator Grinders-sewer		50%	50%	\$ 5,611	2007	1.70	\$ 9,558	\$ 9,558
	Mag convertor		50%	50%	\$ 955	2007	1.70	\$ 1,626	\$ 1,626
	2006 Acme Dynamics Trailer with Pump		50%	50%	\$ 22,895	2007	1.70	\$ 39,000	\$ 39,000
	2007 Chevrolet Silverado 2500		50%	50%	\$ 29,172	2007	1.70	\$ 49,693	\$ 49,693
	Caterpillar Olympian D150PI Portable Generator (On Trailer)	0%			\$ 33,652	2007	1.70	\$ 57,324	\$ 57,324
	WATER TANK IMPROVEMENTS		100%		\$ 14,940	2008	1.63	\$ 24,399	\$ 24,399
	METERS (8)-WATER		100%		\$ 16,895	2008	1.63	\$ 27,592	\$ 27,592
	Strobe Light		50%	50%	\$ 1,058	2008	1.63	\$ 1,728	\$ 1,728
	REWIRE- PUMP-WATER		100%		\$ 952	2008	1.63	\$ 1,555	\$ 1,555
	PORTABLE RADIOS-REFUSE		50%	50%	\$ 1,154	2008	1.63	\$ 1,885	\$ 1,885
	ManHole Restorations-SEWER			100%	\$ 36,455	2008	1.63	\$ 59,536	\$ 59,536
	Back Pack Radio-SEWER			100%	\$ 2,195	2008	1.63	\$ 3,585	\$ 3,585
	Roll Bar-SEWER			100%	\$ 1,115	2008	1.63	\$ 1,821	\$ 1,821
	Carpot-SEWER			100%	\$ 5,790	2008	1.63	\$ 9,456	\$ 9,456
	UPS For Computer Syster (530)		50%	50%	\$ 1,209	2008	1.63	\$ 1,974	\$ 1,974
	Mower-SEWER			100%	\$ 5,895	2008	1.63	\$ 9,627	\$ 9,627
	Reactor with Reducing Adapter		50%	50%	\$ 1,183	2011	1.50	\$ 1,770	\$ 1,770
	Oxidator		50%	50%	\$ 15,341	2011	1.50	\$ 22,955	\$ 22,955
	Peerless M8LB Vert-Turbine Pump		50%	50%	\$ 13,116	2012	1.46	\$ 19,123	\$ 19,123
	2012 Ford F-250 Truck w/ tow package	0%			\$ 17,743	2012	1.46	\$ 25,869	\$ 25,869
	2012 Ford F-150 Truck w/ tow package	0%			\$ 14,892	2012	1.46	\$ 21,713	\$ 21,713
	2012 Ford F-150 Reg Cab 4 x 2	0%			\$ 15,835	2012	1.46	\$ 23,087	\$ 23,087
	2012 Ford F250 4 x 2	0%			\$ 23,706	2012	1.46	\$ 34,563	\$ 34,563
	Variable Speed Sampler		50%	50%	\$ 1,709	2014	1.38	\$ 2,365	\$ 2,365
	Chop Saw		50%	50%	\$ 853	2014	1.38	\$ 1,181	\$ 1,181
	2014 Ford F150 Truck	0%			\$ 18,830	2014	1.38	\$ 26,059	\$ 26,059
	Autoclave Series STE		50%	50%	\$ 4,596	2014	1.38	\$ 6,360	\$ 6,360

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	2014 Ford Explorer	0%			\$ 24,932	2014	1.38	\$ 34,504	\$ 34,504
	2014 Ford F150	0%			\$ 18,830	2014	1.38	\$ 26,059	\$ 26,059
	Fire Hydrant		50%	50%	\$ 5,026	2014	1.38	\$ 6,956	\$ 6,956
	74 HP Motor (TAW)		50%	50%	\$ 19,535	2014	1.38	\$ 27,035	\$ 27,035
	75 HP Pump (Tom Evans)		50%	50%	\$ 29,092	2014	1.38	\$ 40,261	\$ 40,261
	3" Tru/Flo Gal Meter		50%	50%	\$ 2,233	2014	1.38	\$ 3,090	\$ 3,090
	450 # Net Drum (20)		50%	50%	\$ 14,400	2014	1.38	\$ 19,928	\$ 19,928
	Ford F550 Truck	0%			\$ 40,935	2015	1.35	\$ 55,355	\$ 55,355
	2014 John Deere Gator TX 4 x 2		100%		\$ 7,855	2015	1.35	\$ 10,622	\$ 10,622
	Starter		50%	50%	\$ 5,390	2015	1.35	\$ 7,289	\$ 7,289
	2012 MGSI Trailer		50%	50%	\$ 32,634	2015	1.35	\$ 44,131	\$ 44,131
	2015 Multiquip Generator Trailer	0%			\$ 55,150	2015	1.35	\$ 74,578	\$ 74,578
	Caterpillar Generator	0%			\$ 32,806	2015	1.35	\$ 44,363	\$ 44,363
	Ice Cuber and Bin		50%	50%	\$ 3,447	2015	1.35	\$ 4,662	\$ 4,662
	Wanco Solar Trailer		50%	50%	\$ 4,555	2015	1.35	\$ 6,160	\$ 6,160
	2 Depolox 3 Residual Analyzers		50%	50%	\$ 11,375	2015	1.35	\$ 15,382	\$ 15,382
	Sci-Text 1062 and Programming/Screen/Module		50%	50%	\$ 12,047	2015	1.35	\$ 16,291	\$ 16,291
	Fire Hydrant (2)		50%	50%	\$ 3,190	2015	1.35	\$ 4,313	\$ 4,313
	Fire Hydrant (2)		50%	50%	\$ 3,310	2015	1.35	\$ 4,476	\$ 4,476
	60 HP Motor		50%	50%	\$ 2,213	2015	1.35	\$ 2,993	\$ 2,993
	Portable Generator	0%			\$ 1,369	2015	1.35	\$ 1,851	\$ 1,851
	Caterpillar Generator	0%			\$ 40,690	2016	1.31	\$ 53,412	\$ 53,412
	Pub Works Software		50%	50%	\$ 11,250	2016	1.31	\$ 14,767	\$ 14,767
	Air Conditioner		50%	50%	\$ 3,876	2016	1.31	\$ 5,088	\$ 5,088
	Generator	0%			\$ 36,179	2016	1.31	\$ 47,490	\$ 47,490
	Generator	0%			\$ 45,887	2016	1.31	\$ 60,234	\$ 60,234
	Panel Filter		50%	50%	\$ 25,875	2016	1.31	\$ 33,965	\$ 33,965
	Sound Enclosure for Blower Assembly			100%	\$ 9,956	2016	1.31	\$ 13,069	\$ 13,069
	Caterpillar Generator	0%			\$ 41,206	2016	1.31	\$ 54,089	\$ 54,089
	2016 Ford F-150	0%			\$ 27,300	2016	1.31	\$ 35,835	\$ 35,835
	SCADA System - Huey Street WTP		100%		\$ 3,147	2016	1.31	\$ 4,131	\$ 4,131
	CCTV Security System - Fairways WTP		100%		\$ 10,662	2016	1.31	\$ 13,996	\$ 13,996
	Slide Gate - Huey Street WTP		100%		\$ 7,006	2016	1.31	\$ 9,196	\$ 9,196
	Valve Boss		50%	50%	\$ 3,471	2016	1.31	\$ 4,556	\$ 4,556
	Locator		100%		\$ 905	2016	1.31	\$ 1,188	\$ 1,188
	HP EliteBook (2)		50%	50%	\$ 3,287	2016	1.31	\$ 4,315	\$ 4,315
	Aeration Rotor Shaft (East Ditch, South Rotor)			100%	\$ 5,495	2016	1.31	\$ 7,213	\$ 7,213
	Computer Server		50%	50%	\$ 5,123	2016	1.31	\$ 6,725	\$ 6,725
	Rehab 12" Well		100%		\$ 30,583	2016	1.31	\$ 40,145	\$ 40,145
	2016 Harben Jet Rodder Trailer			100%	\$ 47,639	2017	1.26	\$ 60,217	\$ 60,217
	2017 Ford F-150	0%			\$ 23,628	2017	1.26	\$ 29,866	\$ 29,866
	2017 Ford F-250 w/ Light Bar (light bar added separately)	0%			\$ 27,745	2017	1.26	\$ 35,071	\$ 35,071
	Pro Push Camera System			100%	\$ 9,500	2017	1.26	\$ 12,008	\$ 12,008
	Handheld Data Collector		50%	50%	\$ 16,335	2017	1.26	\$ 20,648	\$ 20,648
	2016 Compact Excavator, Trencher on Trailer		50%	50%	\$ 49,565	2017	1.26	\$ 62,651	\$ 62,651
	All Material Locator		50%	50%	\$ 7,488	2017	1.26	\$ 9,465	\$ 9,465
	Cat. 40 KW Generator-Peters St Lift Station			100%	\$ 38,600	2017	1.26	\$ 48,791	\$ 48,791
	Letter Opener - Utility Billing	0%			\$ 1,667	2018	1.23	\$ 2,044	\$ 2,044
	CCTV Security System - Continental CC		50%	50%	\$ 12,017	2018	1.23	\$ 14,738	\$ 14,738
	Fairways VFD		100%		\$ 12,300	2018	1.23	\$ 15,086	\$ 15,086
	Fairways VFD Pump Control (75 HP Danfoss Drive)		50%	50%	\$ 13,795	2018	1.23	\$ 16,919	\$ 16,919
	Trimble Geo 7X handheld GNSS Unit		50%	50%	\$ 5,736	2018	1.23	\$ 7,035	\$ 7,035
	Terra Sync GPS Software (for Trimble Geo 7X)		50%	50%	\$ 2,695	2018	1.23	\$ 3,305	\$ 3,305
	GIS Tornado Antenna (for Trimble Geo 7X)		50%	50%	\$ 1,462	2018	1.23	\$ 1,793	\$ 1,793

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	ICS 695XL Gas-Powered Concrete/Pipe Saw		50%	50%	\$ 2,390	2018	1.23	\$ 2,931	\$ 2,931
	2018 Big Tex Trailer		50%	50%	\$ 5,690	2018	1.23	\$ 6,979	\$ 6,979
	2018 Ford F-150	0%			\$ 23,624	2018	1.23	\$ 28,973	\$ 28,973
	2018 Ford F-150	0%			\$ 23,624	2018	1.23	\$ 28,973	\$ 28,973
	2018 Ford F-150	0%			\$ 23,624	2018	1.23	\$ 28,973	\$ 28,973
	2018 Ford F-150	0%			\$ 28,461	2018	1.23	\$ 34,906	\$ 34,906
	2018 Ford F-150	0%			\$ 23,908	2018	1.23	\$ 29,322	\$ 29,322
	Cargo Glide Slide Out Tray		50%	50%	\$ 1,050	2018	1.23	\$ 1,288	\$ 1,288
	3" 3 HP Pump - CCC LS 45-5			100%	\$ 4,463	2018	1.23	\$ 5,474	\$ 5,474
	Flygt R.A.S. 35 HP Pump - WWTP			100%	\$ 27,689	2018	1.23	\$ 33,960	\$ 33,960
	Polyblend Polymer System - WWTP			100%	\$ 8,060	2018	1.23	\$ 9,885	\$ 9,885
	Remote Terminal Unit - Peter St LS		50%	50%	\$ 12,500	2018	1.23	\$ 15,331	\$ 15,331
	Remote Terminal Unit - Coleman LS		50%	50%	\$ 12,000	2018	1.23	\$ 14,718	\$ 14,718
	Remote Terminal Unit - Lake Miona Reuse Station		50%	50%	\$ 12,000	2018	1.23	\$ 14,718	\$ 14,718
	Remote Terminal Unit - George Nahas LS		50%	50%	\$ 12,500	2018	1.23	\$ 15,331	\$ 15,331
	Vactron LP373GT Vacuum Excavation Machine		50%	50%	\$ 52,500	2019	1.20	\$ 63,156	\$ 63,156
	Caterpillar D60-LC Engine Generator	0%			\$ 47,500	2019	1.20	\$ 57,142	\$ 57,142
	Generator - Part #EU2200A	0%			\$ 949	2019	1.20	\$ 1,142	\$ 1,142
	2019 Ford F-250 Truck	0%			\$ 29,269	2019	1.20	\$ 35,210	\$ 35,210
	2019 Ford F-250 Truck	0%			\$ 29,269	2019	1.20	\$ 35,210	\$ 35,210
	John Deer Rotary Cutter - Split with Pub Works		50%	50%	\$ 2,625	2019	1.20	\$ 3,158	\$ 3,158
	Access Control System @ Wastewater Facility			100%	\$ 5,122	2019	1.20	\$ 6,162	\$ 6,162
	Fleet Fuel Pump System Replacement (Split with all Depts)		50%	50%	\$ 4,500	2019	1.20	\$ 5,413	\$ 5,413
	SFC Micro 2000 Analyzer Controller 115 Volt AC		50%	50%	\$ 8,272	2019	1.20	\$ 9,951	\$ 9,951
	Kyocera TASKalfa 3212i 120V60HZ		50%	50%	\$ 3,987	2020	1.18	\$ 4,718	\$ 4,718
	Honda Generator	0%			\$ 999	2020	1.18	\$ 1,182	\$ 1,182
	Honda Generator	0%			\$ 999	2020	1.18	\$ 1,182	\$ 1,182
	Radiodetection Transmitter		50%	50%	\$ 3,499	2020	1.18	\$ 4,140	\$ 4,140
	20 YD Sludge Container w/side to side roll tarp		50%	50%	\$ 8,660	2020	1.18	\$ 10,247	\$ 10,247
	2020 Freightliner		50%	50%	\$ 379,280	2020	1.18	\$ 448,798	\$ 448,798
	Aquatap Pro Tapping Kit		100%		\$ 3,031	2020	1.18	\$ 3,586	\$ 3,586
	2020 Ford F-150 Truck	0%			\$ 30,344	2020	1.18	\$ 35,906	\$ 35,906
	Honda 340CC Trash Pump		50%	50%	\$ 2,263	2020	1.18	\$ 2,678	\$ 2,678
	Caterpillar D40 Generator	0%			\$ 39,200	2020	1.18	\$ 46,385	\$ 46,385
	Caterpillar D80 Generator	0%			\$ 49,750	2020	1.18	\$ 58,869	\$ 58,869
	2020 Ford F-250 Truck	0%			\$ 34,115	2020	1.18	\$ 40,368	\$ 40,368
	2019 John Deere 310SL Backhoe Loader		50%	50%	\$ 96,908	2021	1.12	\$ 108,390	\$ 108,390
	Caterpillar D60 Generator	0%			\$ 48,665	2021	1.12	\$ 54,431	\$ 54,431
	Caterpillar D125 Diesel Engine Generator	0%			\$ 53,044	2021	1.12	\$ 59,329	\$ 59,329
	Caterpillar D100 Generator	0%			\$ 58,900	2021	1.12	\$ 65,879	\$ 65,879
	Caterpillar D40 Generator	0%			\$ 43,000	2021	1.12	\$ 48,095	\$ 48,095
	Caterpillar D125 Generator	0%			\$ 62,300	2021	1.12	\$ 69,681	\$ 69,681
	Caterpillar D80 Generator	0%			\$ 53,900	2021	1.12	\$ 60,286	\$ 60,286
	Caterpillar D40 Generator	0%			\$ 43,350	2021	1.12	\$ 48,486	\$ 48,486
	Nitrate Probe & SC200 Monitor		50%	50%	\$ 22,757	2021	1.12	\$ 25,453	\$ 25,453
	MRX920v4 Meter Reading Device		50%	50%	\$ 9,963	2021	1.12	\$ 11,143	\$ 11,143
	Hydraulic Clamp Long Arm		50%	50%	\$ 2,223	2021	1.12	\$ 2,487	\$ 2,487
	Radiodetection Ground Penetrating Radar & Display		50%	50%	\$ 15,461	2021	1.12	\$ 17,293	\$ 17,293
	2021 Ford F-250 w/Light Bar (light bar added separately)	0%			\$ 35,706	2021	1.12	\$ 39,936	\$ 39,936
	Chemical Pump Skid		50%	50%	\$ 13,216	2022	1.04	\$ 13,790	\$ 13,790
	Motor		50%	50%	\$ 34,739	2022	1.04	\$ 36,246	\$ 36,246
	2021 Ford Explorer	0%			\$ 27,112	2022	1.04	\$ 28,289	\$ 28,289
	2022 Ford F350	0%			\$ 53,830	2022	1.04	\$ 56,166	\$ 56,166
	2022 Ford F250	0%			\$ 37,836	2022	1.04	\$ 39,478	\$ 39,478

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	Trimble TDC600 GPS Unit		100%		\$ 7,383	2022	1.04	\$ 7,704	\$ 7,704
	2021 John Deere Z930M Gas Mower		50%	50%	\$ 10,275	2022	1.04	\$ 10,721	\$ 10,721
	2021 John Deere Gator XUV835M		50%	50%	\$ 18,900	2022	1.04	\$ 19,720	\$ 19,720
	Camera system - Ribs site			100%	\$ 5,361	2022	1.04	\$ 5,594	\$ 5,594
	Camera system - Wastewater Plant			100%	\$ 29,207	2022	1.04	\$ 30,474	\$ 30,474
	55" 4K Plan Review Table		50%	50%	\$ 11,224	2023	1.02	\$ 11,403	\$ 11,403
	Reizler Camera		100%		\$ 9,563	2023	1.02	\$ 9,716	\$ 9,716
	Triplex Chemical Metering Skid Pump		50%	50%	\$ 36,948	2023	1.02	\$ 37,538	\$ 37,538
	Triplex Chemical Metering Skid Pump		50%	50%	\$ 36,948	2023	1.02	\$ 37,538	\$ 37,538
	SFC Micro 2000 Analyzer		50%	50%	\$ 9,635	2023	1.02	\$ 9,789	\$ 9,789
	2023 Cargo Mate Enclosed Trailer			100%	\$ 7,821	2023	1.02	\$ 7,946	\$ 7,946
	Caterpillar D80 80KW Generator	0%			\$ 63,206	2023	1.02	\$ 64,215	\$ 64,215
	Caterpillar D80 80KW Generator	0%			\$ 65,480	2023	1.02	\$ 66,525	\$ 66,525
	Caterpillar D40 40KW Generator	0%			\$ 55,900	2023	1.02	\$ 56,792	\$ 56,792
	Caterpillar D40 40KW Generator	0%			\$ 57,280	2023	1.02	\$ 58,194	\$ 58,194
	Caterpillar D40 40KW Generator	0%			\$ 55,341	2023	1.02	\$ 56,225	\$ 56,225
	55" 4K Plan Review Table		50%	50%	\$ 11,224	2023	1.02	\$ 11,403	\$ 11,403
	Kyocera Taskalfa 6054ci Printer		50%	50%	\$ 9,139	2023	1.02	\$ 9,285	\$ 9,285
	Dell Latitude 3520 Laptops (20)		50%	50%	\$ 15,362	2023	1.02	\$ 15,607	\$ 15,607
	Oxidation Mixer		50%	50%	\$ 31,500	2023	1.02	\$ 32,003	\$ 32,003
	Water Meters		100%		\$ 410,286	2023	1.02	\$ 416,835	\$ 416,835
	Optiplex SFF 7010 (1) (physical environment)		50%	50%	\$ 1,012	2024	1.00	\$ 1,012	\$ 1,012
	Optiplex Micro 7010 (4)		50%	50%	\$ 2,805	2024	1.00	\$ 2,805	\$ 2,805
	Optiplex SFF 7010 (6) (water dept)		100%		\$ 6,069	2024	1.00	\$ 6,069	\$ 6,069
	Water Meters		100%		\$ 310,672	2024	1.00	\$ 310,672	\$ 310,672
	(2) 12" Touchscreen PLCs (Continental & Fairways		100%		\$ 14,978	2024	1.00	\$ 14,978	\$ 14,978
	2023 Ford F150	0%			\$ 42,879	2024	1.00	\$ 42,879	\$ 42,879
	2023 Ford F150	0%			\$ 37,338	2024	1.00	\$ 37,338	\$ 37,338
	2024 Ford F350	0%			\$ 73,206	2024	1.00	\$ 73,206	\$ 73,206
	2024 Ford F350	0%			\$ 58,822	2024	1.00	\$ 58,822	\$ 58,822
	Optiplex SFF 7010 (8) (wastewater dept)			100%	\$ 8,092	2024	1.00	\$ 8,092	\$ 8,092
	Dell Servers (2)		50%	50%	\$ 9,987	2024	1.00	\$ 9,987	\$ 9,987
	Kyocera Taskalfa 3554CI (wastewater dept)			100%	\$ 5,380	2024	1.00	\$ 5,380	\$ 5,380
	Flygt Model NP-3102.060 6.5HP Pump		50%	50%	\$ 9,757	2024	1.00	\$ 9,757	\$ 9,757
	Flygt Model NP-3127.060 11HP Pump		50%	50%	\$ 15,364	2024	1.00	\$ 15,364	\$ 15,364
	2023 Ford Transit Cargo Vtrade	0%			\$ 48,862	2024	1.00	\$ 48,862	\$ 48,862
	Caterpillar D40 40KW Generator-LS26			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	Caterpillar D40 40KW Generator-LS3			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	Caterpillar D40 40KW Generator-LS4			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	Caterpillar D40 40KW Generator-LS10			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	Caterpillar D40 40KW Generator-LS25			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	2023 Ford F150	0%			\$ 42,879	2024	1.00	\$ 42,879	\$ 42,879
	2023 Ford F150	0%			\$ 35,165	2024	1.00	\$ 35,165	\$ 35,165
	2024 Reizler Crawler Camera MSE-5000			100%	\$ 83,633	2024	1.00	\$ 83,633	\$ 83,633
	LS Blower 3			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	LS Blower 4			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	LS Blower 10			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	LS Blower 25			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	LS Blower 33			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	2023 Ford F350	0%			\$ 64,614	2024	1.00	\$ 64,614	\$ 64,614
	CF150S-CS-FSA Pump 60HP Transfer Pump		50%	50%	\$ 106,304	2024	1.00	\$ 106,304	\$ 106,304
	2024 Ford F250	0%			\$ 68,364	2024	1.00	\$ 68,364	\$ 68,364
	2024 Ford F250	0%			\$ 68,364	2024	1.00	\$ 68,364	\$ 68,364
	Reject pumps			100%	\$ 18,754	2024	1.00	\$ 18,754	\$ 18,754

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	CR 501 Iron Filtration Plant Upgrades (408-533-70-7351)		100%		\$ 11,570	2019	1.20	\$ 13,918	\$ 13,918
	CR 501 Iron Filtration Plant Upgrades (408-533-70-7351)		100%		\$ 47,388	2020	1.18	\$ 56,073	\$ 56,073
	SR 44 Forcemain Project (409-535-70-7345)			100%	\$ 40,950	2020	1.18	\$ 48,456	\$ 48,456
	SR 44 Forcemain Project (409-535-70-7345)			100%	\$ 17,550	2021	1.12	\$ 19,629	\$ 19,629
	Continental Country Club Decommission-SR44 FM portion(409-535-70-7354)		50%	50%	\$ 170,679	2021	1.12	\$ 190,901	\$ 190,901
	CR 501 Service Pump Replacement and Elec Upg (533-3100)?		100%		\$ 10,050	2021	1.12	\$ 11,241	\$ 11,241
	CR 501 Service Pump Replacement and Elec Upg (533-3100)?		100%		\$ 51,950	2022	1.04	\$ 54,204	\$ 54,204
	Millennium Park Project (Reuse Extension) (401-535-60-6310)		50%	50%	\$ 91,900	2022	1.04	\$ 95,888	\$ 95,888
	SR 44 Forcemain Project (401-535-60-6770)			100%	\$ 349,285	2022	1.04	\$ 364,443	\$ 364,443
	WWTP Facility (409-535-70-7346)			100%	\$ 247,031	2022	1.04	\$ 257,752	\$ 257,752
	WWTP Project Phase IA (402-536-70-7353)			100%	\$ 2,317,688	2023	1.02	\$ 2,354,686	\$ 2,354,686
	WWTP Facility (409-535-70-7346)			100%	\$ 679,023	2023	1.02	\$ 689,862	\$ 689,862
	SR 44 Forcemain Project (401-535-60-6770)			100%	\$ 26,499	2023	1.02	\$ 26,922	\$ 26,922
	Millennium Park Project (Reuse Extension) (401-535-60-6310)		50%	50%	\$ 408,808	2023	1.02	\$ 415,334	\$ 415,334
	Stanley Ave & Magnolia St Waterline (401-533-60-6350)		100%		\$ 45,932	2024	1.00	\$ 45,932	\$ 45,932
	Millennium Park Project (Reuse Extension) (401-535-60-6310)		50%	50%	\$ 127,252	2024	1.00	\$ 127,252	\$ 127,252
	CR209 LS Upgrades (401-535-60-6330)			100%	\$ 286,901	2024	1.00	\$ 286,901	\$ 286,901
	SR 44 Forcemain Project (401-535-60-6770)			100%	\$ 3,317,709	2024	1.00	\$ 3,317,709	\$ 3,317,709
	CR 501 Iron Filtration Plant Upgrades (408-533-70-7351)		100%		\$ 37,153	2024	1.00	\$ 37,153	\$ 37,153
	WWTP Project Phase IA (402-536-70-7353)			100%	\$ 432,420	2024	1.00	\$ 432,420	\$ 432,420
	WWTP Project Phase IA (409-535-70-7346)			100%	\$ 406,779	2024	1.00	\$ 406,779	\$ 406,779
	WWTP Facility (409-535-70-7346)			100%	\$ 1,092,275	2024	1.00	\$ 1,092,275	\$ 1,092,275
	WWTP Facility (402-536-70-7353)			100%	\$ 421,800	2024	1.00	\$ 421,800	\$ 421,800
	New HVAC Split System-WWTP			100%	\$ 11,450	2024	1.00	\$ 11,450	\$ 11,450
	Optiplex SFF 7010 (1) (utility billing)	0%			\$ 1,012	2024	1.00	\$ 1,012	\$ 1,012
	Optiplex Micro 7010 (4) (utility billing)	0%			\$ 2,805	2024	1.00	\$ 2,805	\$ 2,805
	Optiplex SFF 7010 (6) (water dept)		100%		\$ 6,069	2024	1.00	\$ 6,069	\$ 6,069
	Water Meters		100%		\$ 310,672	2024	1.00	\$ 310,672	\$ 310,672
	(2) 12" Touchscreen PLCs (Continental & Fairways	0%			\$ 14,978	2024	1.00	\$ 14,978	\$ 14,978
	2023 Ford F150	0%			\$ 42,879	2024	1.00	\$ 42,879	\$ 42,879
	2023 Ford F150	0%			\$ 37,338	2024	1.00	\$ 37,338	\$ 37,338
	2024 Ford F350	0%			\$ 73,206	2024	1.00	\$ 73,206	\$ 73,206
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	Flygt Model NP-3127.060 11HP Pump		50%	50%	\$ 15,364	2024	1.00	\$ 15,364	\$ 15,364
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	Caterpillar D40 40KW Generator-LS3			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	Caterpillar D40 40KW Generator-LS4			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	Caterpillar D40 40KW Generator-LS10			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	Caterpillar D40 40KW Generator-LS25			100%	\$ 69,017	2024	1.00	\$ 69,017	\$ 69,017
	2023 Ford F150	0%			\$ 42,879	2024	1.00	\$ 42,879	\$ 42,879
	2023 Ford F150	0%			\$ 35,165	2024	1.00	\$ 35,165	\$ 35,165
	2024 Reizler Crawler Camera MSE-5000	0%			\$ 83,633	2024	1.00	\$ 83,633	\$ 83,633
	LS Blower 3			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	LS Blower 4			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	LS Blower 10			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	LS Blower 25			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	LS Blower 33			100%	\$ 10,500	2024	1.00	\$ 10,500	\$ 10,500
	2023 Ford F350	0%			\$ 64,614	2024	1.00	\$ 64,614	\$ 64,614
	CF150S-CS-FSA Pump 60HP Transfer Pump		50%	50%	\$ 106,304	2024	1.00	\$ 106,304	\$ 106,304

Water & Sewer Fixed Assets

Schedule 3

Asset Type	Asset Description	Admin	Water	Sewer	Original Cost	Year Acquired	ENR Escalation	RCN	Net Asset Value
	2024 Ford F250	0%			\$ 68,364	2024	1.00	\$ 68,364	\$ 68,364
	2024 Ford F250	0%			\$ 68,364	2024	1.00	\$ 68,364	\$ 68,364
	Reject pumps		50%	50%	\$ 18,754	2024	1.00	\$ 18,754	\$ 18,754
	Chemical Tanks (Oxford WTP)		100%		\$ 66,659	2024	1.00	\$ 66,659	\$ 66,659
	Rehab and recoating 29 manholes			100%	\$ 70,438	2024	1.00	\$ 70,438	\$ 70,438
	Riser Piping Upgrade-St. Clair		50%	50%	\$ 33,598	2024	1.00	\$ 33,598	\$ 33,598
	Riser Piping Upgrade-LS #1			100%	\$ 82,903	2024	1.00	\$ 82,903	\$ 82,903
	LS Control Panel Upgrade (6 LS)			100%	\$ 208,436	2024	1.00	\$ 208,436	\$ 208,436
	Headworks Drum Screen Control Panel		50%	50%	\$ 46,594	2024	1.00	\$ 46,594	\$ 46,594
	Rehab and recoating 27 manholes and 3 LS Wet Wells			100%	\$ 191,611	2024	1.00	\$ 191,611	\$ 191,611
	Wildwood Estates LS Upgrade and relocation			100%	\$ 943,400	2024	1.00	\$ 943,400	\$ 943,400
	Chitty Chatty Utility Bridge Crossing		50%	50%	\$ 162,877	2024	1.00	\$ 162,877	\$ 162,877
	Osceola FM/St.Clair LS Improvements			100%	\$ 431,092	2024	1.00	\$ 431,092	\$ 431,092
	Ashley WTP Upgrades		100%		\$ 732,218	2024	1.00	\$ 732,218	\$ 732,218
Total Fixed Assets					\$ 88,378,623			\$ 137,823,929	\$ 137,823,929

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: Millennium Park Project Change Order No. 2 in the Amount of \$127,000

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department: Public Works

BUDGET IMPACT: Funding will be allocated from 301-572-60-6302.

HISTORY/FACTS/ISSUES:

On February 13, 2025, the City Commission approved the award of the Millennium Park Phase 1 & 2 Project to Kingdom Construction.

Kingdom Construction has submitted Change Order No. 2 (CO 2) in the amount of \$127,000 for additional work required to construct a retaining wall at North Ponds 6 and 7. The retaining wall is necessary to maintain the planned trail width and avoid conflicts with existing reclaimed water infrastructure within the project area.

To ensure cost-effectiveness, City staff evaluated two construction options - treated timber and split-face concrete block walls. Proposals were received for both, with the split-face block wall construction being the more economical option.

CPH Engineering has reviewed the change order and recommends approval.



500 West Fulton Street
Sanford, FL 32771
Phone: 407.322.6841
Fax: 407.330.0639

July 23, 2025

Hector Sanchez
City of Wildwood
743 Huey Street
Wildwood, FL 34785

RE: Millennium Park Phase 1&2 Retaining Wall Recommendation
1300 Huey Street, Wildwood, FL 34785
CPH Job# W12803

Dear Hector,

Please find attached timber vs block retaining wall cost breakdowns provided by Kingdom Construction. Based on review of the associated cost with either option and the value of the final product, CPH recommends the City move forward with the block wall option in the amount of \$127,799.00 dated 6/10/2025.

Sincerely,
CPH, Inc.

John Skrandel^{2025.07.23}
^{16:25:15-04'00'}

John Skrandel
Construction Administrator



Block Retaining Wall Breakdown

Name of Project: Wildwood Millennium Park

CO#:
Date: 6/10/2025

Description of Work: Breakdown of cost for the Block Wall in the ponds

NO.	DESCRIPTION	Material				Labor			Sub Cost	Total Cost
		Qty	Unit	Unit Price	Material Costs	Hours /Unit	Rate	Labor Cost		
1	Footers				\$ -			\$ -	\$ 20,750.00	\$ 20,750.00
2	Block				\$ -			\$ -	\$ 27,120.00	\$ 27,120.00
3	Precast Cap				\$ -			\$ -	\$ 6,034.00	\$ 6,034.00
4	Cell fill & Pump				\$ -			\$ -	\$ 14,000.00	\$ 14,000.00
5	Labor				\$ -	1100.00	\$ 45.00	\$ 49,500.00	\$ -	\$ 49,500.00
6					\$ -			\$ -	\$ -	\$ -
7					\$ -			\$ -	\$ -	\$ -
8					\$ -			\$ -	\$ -	\$ -
9					\$ -			\$ -	\$ -	\$ -
10					\$ -			\$ -	\$ -	\$ -
11					\$ -			\$ -	\$ -	\$ -
12					\$ -			\$ -	\$ -	\$ -
13					\$ -			\$ -	\$ -	\$ -
14					\$ -			\$ -	\$ -	\$ -
15					\$ -			\$ -	\$ -	\$ -
Total		0.00	0.00	\$ -	\$ -	1100.00	\$ 45.00	\$ 49,500.00	\$ 67,904.00	\$ 117,404.00

Sales Tax: \$ -
Payroll Taxes & Insurance \$ 10,395.00
Subtotal \$ 127,799.00
\$ -
\$ -

SIGNATURE: _____

ACCEPTED BY: _____

DATE: _____

KINGDOM CONSTRUCTION SIGNATURE: _____

ACCEPTED BY: IAN NICHOLS

DATE: _____

CHANGE ORDER PROPOSAL: \$ 127,799.00



Timber Wall Breakdown

Name of Project: Wildwood Millennium Park

CO#:

Date: 7/18/2025

Description of Work: Breakdown of cost for the 711' of Timber Wall using marine grade pressure treated material in the ponds

NO.	DESCRIPTION	Material				Labor			Sub Cost	Total Cost
		Qty	Unit	Unit Price	Material Costs	Hours /Unit	Rate	Labor Cost		
1	Timber Wall Material				\$ -			\$ -	\$ 61,230.00	\$ 61,230.00
2	Timber Wall Labor				\$ -			\$ -	\$ 19,560.00	\$ 19,560.00
3	Equipment for Timer Wall Construction				\$ -			\$ -	\$ 12,230.00	\$ 12,230.00
4	Timber Wall Contractor Fee				\$ -			\$ -	\$ 5,615.00	\$ 5,615.00
5	Excavation, Grading and Backfill				\$ -			\$ -	\$ 17,775.00	\$ 17,775.00
6	General Conditions, CAD File Update, Layout, As-Built, etc.				\$ -			\$ -	\$ 23,729.00	\$ 23,729.00
7	Excavation, Grading and Backfill				\$ -			\$ -	\$ -	\$ -
8					\$ -			\$ -	\$ -	\$ -
9					\$ -			\$ -	\$ -	\$ -
10					\$ -			\$ -	\$ -	\$ -
11					\$ -			\$ -	\$ -	\$ -
12					\$ -			\$ -	\$ -	\$ -
13					\$ -			\$ -	\$ -	\$ -
14					\$ -			\$ -	\$ -	\$ -
15					\$ -			\$ -	\$ -	\$ -
Total		0.00	0.00	\$ -	\$ -	0.00	\$ -	\$ -	\$ 140,139.00	\$ 140,139.00

Sales Tax: \$ -
Payroll Taxes & Insurance \$ -
Subtotal \$ 140,139.00
Overhead Costs - 10% \$ -
Fee - 10% \$ -

CHANGE ORDER PROPOSAL: \$ 140,139.00

SIGNATURE: _____

ACCEPTED BY: _____

DATE: _____

KINGDOM CONSTRUCTION SIGNATURE: _____

ACCEPTED BY: IAN NICHOLS

DATE: _____

SECTION 00950
CHANGE ORDER FORM

Change Order No. 2

Project Name: Millennium Park Phase 1 & 2

Bid No.: ITB-2024-30

Owner: The City of Wildwood

Contractor: Kingdom Construction

Agreement Date: February 13, 2025

This Change Order is necessary to cover changes in the Work to be performed under the Agreement. The Agreement, General Conditions, Supplementary Conditions, and Technical Specifications contained in the Project Manual apply to and govern all Work under this Change Order.

THE FOLLOWING CHANGES ARE MADE TO THE CONTRACT DOCUMENTS:

1.	Original Contract Price	\$ 10,645,645.08
2.	Current Contract Price (Adjusted by Previous Change Orders)	\$ 10,650,393.53
3.	Total Proposed Change in Contract Price	\$ 127,799.00
4.	New Contract Price (Item 2 + Item 3)	\$ 10,778,192.53
5.	Original Contract Time (Notice to Proceed to Substantial Completion)	730 Days
6.	Current Contract Time (Adjusted by Previous Change Orders)	730 Days
7.	Current Subst. Completion Date (Adjusted by Previous Change Orders)	February 13, 2027
8.	Total Proposed Change in Contract Time	0 Days
9.	New Contract Time (Item 6 + Item 8)	730 Days
10.	New Contract Substantial Completion Date (Item 7 + Item 8)	February 13, 2027
11.	Current Final Completion Date (Adjusted by Previous Change Orders)	March 30, 2027
12.	Current Contract Time From Substantial Completion to Final Completion	45 Days
13.	Total Proposed Change in Contract Time Subst. to Final Completion	0 Days
14.	New Contract Time Subst. To Final Completion (Item 12 + Item 13)	45 Days
15.	New Contract Final Completion Date (Item 10 + Item 14)	March 30, 2027

CHANGES ORDERED

ITEM 1

- RFI #08: Added block retaining wall to ponds 6 & 7.
- Change due to existing grade issues
- See attached RFI

Change in Contract Price: \$127,799.00

Change in Contract Time: 0 Days

CHANGE ORDER SUMMARY			
No.	Description	Change in Contract Price	Change in Contract Time
2	Concrete Block Retaining Wall	\$127,799.00	0
TOTAL		\$127,799.00	0 Days

WAIVER This Change Order constitutes full and mutual accord and satisfaction for the adjustment of the Contract Price and Contract Time as a result of increases or decreases in cost and time of performance caused directly and indirectly from the change. Acceptance of this Waiver constitutes an agreement between OWNER and CONTRACTOR that the Change Order represents an equitable adjustment to the Agreement and that CONTRACTOR shall waive all rights to file a Contract Claim or claim of any nature on this Change Order. Execution of this Change Order shall constitute CONTRACTOR's complete acceptance and satisfaction that it is entitled to no more costs or time (direct, indirect, impact, etc.) pursuant to this Change Order.

APPROVAL AND CHANGE ORDER AUTHORIZATION

ACKNOWLEDGMENTS

The **Change Order 2**, and work affected thereby, is subject to all provisions of the original Agreement and specifically changed by this Change Order; and

It is expressly understood and agreed that the approval of the Change Order shall have no effect on the original Agreement other than matters expressly provided herein.

WITNESS to CONTRACTOR:



8/13/2025

Date

Kingdom Construction

Contractor

Ian Nichols President

Printed Name and Title of Officer



By (Signature)

08/13/2025

Date

(Corporate Seal)

ATTEST:

(Signature)

Date

(Seal)

City of Wildwood

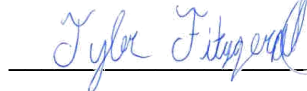
Owner

Printed Name and Title

By (Signature)

Date

Recommended CPH - EOR:



Tyler Fitzgerald, PE

END OF SECTION

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: Millennium Park Phase 1 & 2 Project Payment Application 6 in the Amount of \$249,068.81

REQUESTED ACTION: Staff recommends approval.

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

BUDGET IMPACT: Funding for the project has been allocated to account 301-572-60-6302.

HISTORY/FACTS/ISSUES:

The Millennium Park Phase 1 & 2 Project was approved by the City Commission and awarded to Kingdom Construction on February 13, 2025. Kingdom Construction has submitted Payment Application No. 6 in the amount of \$249,068.81 for work performed from June 26 through July 25, 2025. As of this application, the project is approximately 31% complete.

CPH, the City's consulting engineer, has reviewed Payment Application No. 6 and recommends approval.

APPLICATION FOR PAYMENT AND AFFIDAVIT

NAME:	<u>KINGDOM CONSTRUCTION</u>	PROJECT NAME:	<u>WILDWOOD MILLENIUM PARK</u>
ADDRESS:	<u>1102 N MAIN STREET, SUITE E</u>	PROJECT NO:	<u>252</u>
CITY, ST, ZIP:	<u>WILDWOOD, FL 34785</u>	DRAW NO:	<u>6REV</u>
		PERIOD TO:	<u>07/25/25</u>

STATEMENT OF CONTRACT AMOUNT:

1.	Original Contract Amount	\$ <u>10,645,645.08</u>	(1)
2.	Approved Changes	\$ <u>4748.45</u>	(2)
3.	Revised Contract Amount (1 + or - 2)	\$ <u>10,650,393.53</u>	(3)
4.	Contract Completed to Date:	\$ <u>3,323,601.22</u>	(4)
5.	Retainage	\$ <u>166,180.06</u>	(5)
6.	Contract Completed Less Retainage (4 - 5)	\$ <u>3,157,421.16</u>	(6)
7.	Less Previous Request (line 6 from previous draw)	\$ <u>2,908,352.35</u>	(7)
8.	Current Request for Payment (6 - 7)	\$ <u>249,068.81</u>	(8)
9.	Remaining Contract to Bill (3 - 6)	\$ <u>7,492,972.38</u>	(9)

Change Order Summary	Additions	Deductions
Total changes approved in previous months by Owner	4748.45	
Total approved this month	0.00	
Total	4748.45	
NET CHANGES by Change Order	4748.45	

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief in the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.

KINGDOM CONSTRUCTION SERVICES, INC.
Company Name

[Signature]
Signature

Karrie Fitzgerald/Senior PM
Print Name/Title

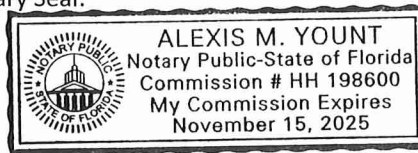
State of FL County of Sumter

The foregoing instrument was acknowledged before me this 13th day of August 2025 by Karrie Fitzgerald
as Senior PM for Kingdom Construction

☒ Personally Known
☐ Produced Identification

Notary [Signature]
My Commission Expires: 11/15/2025

Notary Seal:



ARCHITECT'S CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on on-site observations and the date comprising this application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the Amount Certified.

Amount Certified \$ 249,068.81

Architect:

By: John Skrandel 2025.08.13 14:05:04-04'00' Date: _____

This certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

A	B	C	D	E	F	G	H	I	
			Work Completed						
Item No.	Desc. Of Work	Scheduled Value	From Previous Application	This Period	Materials stored (not in D or E)	Total Completed and Stored	% billed	Balance to Finish	Retainage-5%
A-1	Bonds and Insurance	\$ 401,886.10	\$ 401,886.10	\$ -		\$ 401,886.10	100%	\$ -	\$ 20,094.31
A-2	Mobilization	\$ 1,435,793.80	\$ 1,435,793.80	\$ -		\$ 1,435,793.80	100%	\$ -	\$ 71,789.69
A-3	Preconstruction Topographic Surveying	\$ 52,500.00	\$ 52,500.00	\$ -		\$ 52,500.00	100%	\$ -	\$ 2,625.00
A-4	Record Drawings	\$ 52,500.00				\$ -	0%	\$ 52,500.00	\$ -
A-5	Demobilization, Cleanup, Project Closeout (Incl.Material and Workmanship Bond)	\$ 25,000.00				\$ -	0%	\$ 25,000.00	\$ -
A-6	Preconstruction Video	\$ 1,404.14	\$ 1,404.14	\$ -		\$ 1,404.14	100%	\$ 0.00	\$ 70.21
A-7	Temporary Traffic Control - Millennium Park	\$ 21,000.00				\$ -	0%	\$ 21,000.00	\$ -
A-8	Temporary Traffic Control - Powell Rd.	\$ 21,000.00				\$ -	0%	\$ 21,000.00	\$ -
A-9	Erosion and Sediment Control	\$ 61,687.50	\$ 30,843.50	\$ 8,591.95		\$ 39,435.45	64%	\$ 22,252.05	\$ 1,971.77
A-10	Silt Fence	\$ 27,431.25	\$ 27,431.25	\$ -		\$ 27,431.25	100%	\$ -	\$ 1,371.56
A-11	Clearing and Grubbing	\$ 121,376.33	\$ 61,912.29	\$ -		\$ 61,912.29	51%	\$ 59,464.04	\$ 3,095.61
A-12	Demolition - Existing Driveway Aprons, Crushed Asphalt Parking Area, Concrete Pad at New Racquetball Court, Misc.Portions of Dirt Trail	\$ 192,353.18	\$ 42,064.37	\$ -		\$ 42,064.37	22%	\$ 150,288.81	\$ 2,103.22
B-1	Regular Excavation (ACAD Measurement Based on LIDAR Data and Proposed Elevations and 25% Increase to ACADMeasurement)	\$ 320,036.59	\$ 186,176.36	\$ 7,546.50		\$ 193,722.86	61%	\$ 126,313.73	\$ 9,686.14
B-2	Embankment (Fill Placement) ACAD Measurement Based on LIDAR Data and Proposed Elevations and 25% Increase to ACADMeasurement)	\$ 151,415.84	\$ 151,415.84	\$ -		\$ 151,415.84	100%	\$ (0.00)	\$ 7,570.79
B-3	Borrow Material (Allowance)	\$ 175,000.00	\$ 160,241.45	\$ -		\$ 160,241.45	92%	\$ 14,758.55	\$ 8,012.07
B-4	Allowance - Additional Earthwork (If Needed)	\$ 250,000.00	\$ 250,000.00	\$ -		\$ 250,000.00	100%	\$ -	\$ 12,500.00
B-5	8" Stabilized Subgrade or 4" Crushed ConcreteSubgrade (Furnish and Install) (Trail, Cart Path)	\$ 71,659.20	\$ 40,314.31	\$ -		\$ 40,314.31	56%	\$ 31,344.89	\$ 2,015.72
B-6	12" Stabilized Subgrade or 6" Crushed Concrete Subgrade (Furnish and Install) (Road, Turn Lane, Parking Lots, TurnaroundArea)	\$ 239,234.69	\$ 36,349.76	\$ 20,700.09		\$ 57,049.85	24%	\$ 182,184.84	\$ 2,852.49
B-7	6" Limerock Base or 6" Crushed Concrete Base (Furnish and Install) (Road,Parking Lots, Trail, Cart Path)	\$ 358,260.90	\$ 40,314.32	\$ 21,335.59		\$ 61,649.91	17%	\$ 296,610.99	\$ 3,082.50
B-8	10" Limerock Base or 10" Crushed Concrete Base (Furnish and Install) (TurnLane)	\$ 18,692.16		\$ -		\$ -	0%	\$ 18,692.16	\$ -
B-9	Asphalt Surface Course, Type SP 9.5 (1") (Furnish and Install) (Trail, CartPath)	\$ 149,612.90				\$ -	0%	\$ 149,612.90	\$ -
B-10	Asphalt Surface Course, Type SP 12.5 (1.5") (Furnish and Install) (Road, Turn Lane, Parking Lots)	\$ 352,210.13				\$ -	0%	\$ 352,210.13	\$ -
B-11	Asphalt Friction Course, Type SP 12.5 (1.5") (Traffic) (PG 76-22) (Furnish and Install) (Turn Lane)	\$ 20,697.52				\$ -	0%	\$ 20,697.52	\$ -
B-12	Ditch Bottom Inlet Type C (P-Bottom) (<10') (Furnish and Install)	\$ 55,663.02		\$ 5,990.39		\$ 5,990.39	11%	\$ 49,672.63	\$ 299.52
B-13	Ditch Bottom Inlet Type C (P-Bottom With Sump)(<10') (Furnish and Install)	\$ 3,975.93	\$ 3,937.44	\$ -		\$ 3,937.44	99%	\$ 38.49	\$ 196.87
B-14	Ditch Bottom Inlet Type C (J-Bottom) (<10') (Furnish and Install)	\$ 8,604.54	\$ 8,522.59	\$ -		\$ 8,522.59	99%	\$ 81.95	\$ 426.13
B-15	Ditch Bottom Inlet Type D (P-Bottom) (<10') (Furnishand Install)	\$ 5,717.04		\$ 1,043.36		\$ 1,043.36	18%	\$ 4,673.68	\$ 52.17
B-16	Ditch Bottom Inlet Type D (J-Bottom) (<10') (Furnish and Install)	\$ 26,443.62		\$ 3,096.28		\$ 3,096.28	12%	\$ 23,347.34	\$ 154.81
B-17	Ditch Bottom Inlet Type D (J-Bottom With Sump)(<10') (Furnish and Install)	\$ 11,433.45		\$ 1,609.56		\$ 1,609.56	14%	\$ 9,823.89	\$ 80.48
B-18	Type P-8 Manhole (<10') (Furnish and Install)	\$ 20,317.50		\$ 2,489.50		\$ 2,489.50	12%	\$ 17,828.00	\$ 124.48
B-19	Type J-8 Manhole (<10') (Furnish and Install)	\$ 22,817.97		\$ 2,737.17		\$ 2,737.17	12%	\$ 20,080.80	\$ 136.86
B-20	Nyoplast or Equal Drain Basin (8") (<10') (Furnish and Install)	\$ 5,718.35		\$ 1,043.49		\$ 1,043.49	18%	\$ 4,674.86	\$ 52.17
B-21	Nyoplast or Equal Drain Basin (10") (<10') (Furnishand Install)	\$ 11,436.71				\$ -	0%	\$ 11,436.71	\$ -
B-22	Nyoplast or Equal Drain Basin (12") (<10') (Furnish and Install)	\$ 3,812.24				\$ -	0%	\$ 3,812.24	\$ -
B-23	Nyoplast or Equal Drain Basin (15") (<10') (Furnishand Install)	\$ 3,812.24				\$ -	0%	\$ 3,812.24	\$ -
B-24	Nyoplast or Equal DrainBasin (24") (<10') (Furnish and Install)	\$ 1,906.12				\$ -	0%	\$ 1,906.12	\$ -
B-25	Concrete Mitered End Section (12") (Furnish andInstall)	\$ 2,100.00				\$ -	0%	\$ 2,100.00	\$ -
B-26	Concrete Mitered End Section (18") (Furnish andInstall)	\$ 15,614.55				\$ -	0%	\$ 15,614.55	\$ -
B-27	Concrete Mitered EndSection (24") (Furnish and Install)	\$ 20,750.10				\$ -	0%	\$ 20,750.10	\$ -
B-28	Concrete Mitered End Section (30") (Furnish and Install)	\$ 8,022.00				\$ -	0%	\$ 8,022.00	\$ -
B-29	Concrete Mitered EndSection (36") (Furnish and Install)	\$ 9,730.35				\$ -	0%	\$ 9,730.35	\$ -
B-30	Concrete Mitered End Section (12"x18") (Furnish and Install)	\$ 8,494.50				\$ -	0%	\$ 8,494.50	\$ -
B-31	Concrete Mitered EndSection (19"x30") (Furnish and Install)	\$ 16,989.00				\$ -	0%	\$ 16,989.00	\$ -
B-32	8" Storm Sewer (Corrugated HDPE) (Furnish and Install)	\$ 5,859.82				\$ -	0%	\$ 5,859.82	\$ -
B-33	10" Storm Sewer (Corrugated HDPE) (Furnish and Install)	\$ 23,228.54				\$ -	0%	\$ 23,228.54	\$ -
B-34	12" Storm Sewer (Corrugated HDPE) (Furnish and Install)	\$ 15,360.28				\$ -	0%	\$ 15,360.28	\$ -
B-35	15" Storm Sewer (Corrugated HDPE) (Furnish and Install)	\$ 50,113.83		\$ 5,440.76		\$ 5,440.76	11%	\$ 44,673.07	\$ 272.04
B-36	18" Storm Sewer (RCP) (Furnish and Install)	\$ 147,917.54	\$ 10,906.63	\$ 4,221.36		\$ 15,127.99	10%	\$ 132,789.55	\$ 756.40
B-37	24" Storm Sewer (RCP) (Furnish and Install)	\$ 70,259.41	\$ 7,190.27	\$ -		\$ 7,190.27	10%	\$ 63,069.14	\$ 359.51
B-38	30" Storm Sewer (RCP) (Furnish and Install)	\$ 23,079.58		\$ 2,763.08		\$ 2,763.08	12%	\$ 20,316.50	\$ 138.15
B-39	36" Storm Sewer (RCP) (Furnish and Install)	\$ 97,754.16		\$ 10,159.42		\$ 10,159.42	10%	\$ 87,594.74	\$ 507.97
B-40	12"x18" Storm Sewer (ERCP) (Furnish andInstall)	\$ 4,752.24		\$ 947.79		\$ 947.79	20%	\$ 3,804.44	\$ 47.39
B-41	19"x30" Storm Sewer(ERCP) (Furnish and Install)	\$ 27,049.18		\$ 3,156.25		\$ 3,156.25	12%	\$ 23,892.92	\$ 157.81
B-42	Underdrain Type II (12" PVC, Aggregate, FilterFabric) (Furnish and Install)	\$ 32,848.58				\$ -	0%	\$ 32,848.58	\$ -
B-43	Underdrain Header Pipe(12" PVC) (Furnish and Install)	\$ 11,292.47				\$ -	0%	\$ 11,292.47	\$ -
B-44	Underdrain Cleanouts (Furnish and Install)	\$ 35,167.04				\$ -	0%	\$ 35,167.04	\$ -
B-45	Concrete Curb and Gutter, Type 'F' (Furnish andInstall)	\$ 12,140.94				\$ -	0%	\$ 12,140.94	\$ -
B-46	Concrete Valley Gutter (Furnish and Install)	\$ 17,743.97				\$ -	0%	\$ 17,743.97	\$ -
B-47	Standard Concrete Sidewalk (Including Ramps and Warning Mats), Bench, and Trash ReceptacleConcrete Pads (4") (Furnish and Install)	\$ 6,890.52				\$ -	0%	\$ 6,890.52	\$ -
B-48	Standard Concrete Trail (10' Wide; 4" Thick)	\$ 110,436.59				\$ -	0%	\$ 110,436.59	\$ -
B-49	Concrete Sidewalk (4" With Thickened Edge) (Furnishand Install)	\$ 58,200.00				\$ -	0%	\$ 58,200.00	\$ -
B-50	Misc. Concrete Pads (6") (Furnish and Install)	\$ 54,061.51				\$ -	0%	\$ 54,061.51	\$ -

B-51	Standard Concrete (6") (Furnish and Install) (Trail Crossing at Access Rd)	\$	12,400.13				\$	-	0%	\$	12,400.13	\$	-	
B-52	Heavy Duty Concrete (7") (Furnish and Install) (Food Truck Parking Area and Driveway and Concession Building and Restroom Concrete)	\$	220,371.47				\$	-	0%	\$	220,371.47	\$	-	
B-53	Concrete Rip Rap (At Pond Bottom At MES)	\$	26,381.25				\$	-	0%	\$	26,381.25	\$	-	
B-54	Wheel Stops	\$	28,231.88				\$	-	0%	\$	28,231.88	\$	-	
B-55	Three Rail Wood Fence (4ft) (Furnish and Install) (Along Powell Rd.)	\$	17,401.80				\$	-	0%	\$	17,401.80	\$	-	
B-56	Tennis Court Construction (Sub-base, Base, Concrete, Painting, Striping)	\$	228,800.00				\$	-	0%	\$	228,800.00	\$	-	
B-57	Street Signs and Posts (Furnish and Install)	\$	11,871.56				\$	-	0%	\$	11,871.56	\$	-	
B-58	Wayfinding Signage	\$	11,169.38				\$	-	0%	\$	11,169.38	\$	-	
B-59	Painted Pavement Markings (4" White at Parking Stalls) (Furnish and Install)	\$	4,554.90				\$	-	0%	\$	4,554.90	\$	-	
B-60	Painted Pavement Markings (6" Blue at ADA Parking Stalls) (Furnish and Install)	\$	430.92				\$	-	0%	\$	430.92	\$	-	
B-61	Painted Pavement Markings (6" White at ADA Parking Stalls) (Furnish and Install)	\$	526.68				\$	-	0%	\$	526.68	\$	-	
B-62	ADA Parking Aisle Striping and Handicap Symbol (Painted) (Furnish and Install)	\$	275.63				\$	-	0%	\$	275.63	\$	-	
B-63	Thermoplastic, Std, White, Solid 12"	\$	318.15				\$	-	0%	\$	318.15	\$	-	
B-64	Thermoplastic, Std, White, Solid, 24"	\$	4,328.16				\$	-	0%	\$	4,328.16	\$	-	
B-65	Thermoplastic, Standard, White, Arrow	\$	2,526.56				\$	-	0%	\$	2,526.56	\$	-	
B-66	Thermoplastic, Std-Op, Yellow, Solid, 12"	\$	1,237.95				\$	-	0%	\$	1,237.95	\$	-	
B-67	Thermoplastic, Std-Op, Yellow, Solid, 6"	\$	2,898.26				\$	-	0%	\$	2,898.26	\$	-	
B-68	Gravity Retaining Wall	\$	43,344.00				\$	-	0%	\$	43,344.00	\$	-	
B-69	Pipe Guiderail	\$	17,653.36				\$	-	0%	\$	17,653.36	\$	-	
C-1	Remove Existing Inactive 6" Force Main	\$	3,181.50			\$	2,052.70	\$	2,052.70	65%	\$	1,128.80	\$	102.64
C-2	Remove Existing 12" Water Main	\$	12,738.60			\$	6,785.74	\$	6,785.74	53%	\$	5,952.86	\$	339.29
C-3	Remove Existing 8" Sanitary Sewer	\$	27,518.40			\$	14,105.26	\$	14,105.26	51%	\$	13,413.14	\$	705.26
C-4	Remove Existing Sanitary Sewer Manhole	\$	3,780.00			\$	3,780.00	\$	3,780.00	100%	\$	-	\$	189.00
C-5	1" Water Service Line (Open Cut or Dir. Drill) (PE) (Furnish and Install)	\$	1,831.20			\$	1,111.92	\$	1,111.92	61%	\$	719.28	\$	55.60
C-6	4" Water Main (Open Cut) (DI) (Restrained) (Furnish and Install)	\$	2,218.86	\$	219.77	\$	1,026.53	\$	1,246.30	56%	\$	972.56	\$	62.32
C-7	8" Water Main (Open Cut) (PVC) (Unrestrained) (Furnish and Install)	\$	5,874.28			\$	2,513.51	\$	2,513.51	43%	\$	3,360.76	\$	125.68
C-8	8" Water Main (Open Cut) (PVC) (Restrained) (Furnish and Install)	\$	8,402.94			\$	3,390.12	\$	3,390.12	40%	\$	5,012.82	\$	169.51
C-9	12" Water Main (Open Cut) (PVC) (Unrestrained) (Furnish and Install)	\$	63,779.35	\$	6,317.21	\$	16,491.18	\$	22,808.39	36%	\$	40,970.96	\$	1,140.42
C-10	12" Water Main (Open Cut) (PVC) (Restrained) (Furnish and Install)	\$	47,157.61	\$	1,269.47	\$	15,775.60	\$	17,045.07	36%	\$	30,112.54	\$	852.25
C-11	4" D.I. Bends (45, 90) (Water Main) (Furnish and Install)	\$	13,772.18	\$	1,364.00	\$	3,887.35	\$	5,251.35	38%	\$	8,520.82	\$	262.57
C-12	8" D.I. Bends (45, 90) (Water Main) (Furnish and Install)	\$	11,476.82	\$	1,364.10	\$	4,455.73	\$	5,819.83	51%	\$	5,656.98	\$	290.99
C-13	12" D.I. Bends (11.25, 22.5, 45, 90) (Water Main) (Furnish and Install)	\$	16,067.54	\$	1,591.45	\$	4,455.73	\$	6,047.18	38%	\$	10,020.36	\$	302.36
C-14	12" D.I. Tee (12"x4", 12"x6") (Water Main) (Furnish and Install)	\$	6,886.09	\$	682.04	\$	2,182.23	\$	2,864.27	42%	\$	4,021.82	\$	143.21
C-15	12" D.I. Wye / Tee (12"x12") (Water Main) (Furnish and Install)	\$	4,590.73	\$	454.70	\$	1,613.85	\$	2,068.55	45%	\$	2,522.17	\$	103.43
C-16	8" D.I. Plug / Cap (Water Main) (Furnish and Install)	\$	2,295.36			\$	1,272.82	\$	1,272.82	55%	\$	1,022.54	\$	63.64
C-17	12" D.I. Plug / Cap (Water Main) (Furnish and Install)	\$	6,886.09	\$	682.04	\$	2,316.33	\$	2,998.37	44%	\$	3,887.72	\$	149.92
C-18	Temporary Jumper Connection (Furnish and Install, Remove)	\$	3,164.49	\$	313.44	\$	1,260.69	\$	1,574.13	50%	\$	1,590.36	\$	78.71
C-19	12" x 1" Service Saddle and Corp. Stop (Furnish and Install)	\$	1,978.16	\$	1,959.32	\$	-	\$	1,959.32	99%	\$	18.84	\$	97.97
C-20	8" x 8" Tapping Sleeve and Valve (Furnish and Install)	\$	6,211.28			\$	2,630.35	\$	2,630.35	42%	\$	3,580.93	\$	131.52
C-21	12" x 12" Tapping Sleeve and Valve (Furnish and Install)	\$	18,108.83	\$	1,793.64	\$	5,368.30	\$	7,161.94	40%	\$	10,946.89	\$	358.10
C-22	Close Valves, Connect to Existing 12" Water Main	\$	1,874.57	\$	185.64	\$	941.39	\$	1,127.03	60%	\$	747.54	\$	56.35
C-23	1" Gate Valve	\$	525.00			\$	525.00	\$	525.00	100%	\$	-	\$	26.25
C-24	Fire Hydrant Assembly (Furnish and Install)	\$	18,747.54			\$	6,976.25	\$	6,976.25	37%	\$	11,771.29	\$	348.81
C-25	Blowoff Assembly (Furnish and Install)	\$	2,826.08			\$	1,456.81	\$	1,456.81	52%	\$	1,369.26	\$	72.84
C-26	Fire Department Connection (4") (Furnish and Install)	\$	2,682.96			\$	1,407.19	\$	1,407.19	52%	\$	1,275.77	\$	70.36
C-27	Line Stop Assembly, 12" (Furnish and Install) (If Needed)	\$	27,090.00			\$	9,868.30	\$	9,868.30	36%	\$	17,221.70	\$	493.42
C-28	Install Thrust Collar, Cut and Cap Existing 12" Water Main	\$	-			\$	-	\$	-	NA	\$	-	\$	-
C-29	Bypass Pumping (Sanitary Sewer)	\$	21,000.00			\$	10,877.10	\$	10,877.10	52%	\$	10,122.90	\$	543.86
C-30	8" Sanitary Sewer Line (Open Cut) (PVC) (Furnish and Install)	\$	82,505.24	\$	30,984.92	\$	23,427.15	\$	54,412.07	66%	\$	28,093.17	\$	2,720.60
C-31	Sanitary Sewer Manhole (Furnish and Install)	\$	63,257.92	\$	30,984.92	\$	-	\$	30,984.92	49%	\$	32,273.00	\$	1,549.25
C-32	Connect to Existing Sanitary Sewer Manhole	\$	7,350.00			\$	7,350.00	\$	7,350.00	100%	\$	-	\$	367.50
C-33	4" Backflow Preventer Assembly	\$	9,624.41			\$	-	\$	-	0%	\$	9,624.41	\$	-
D-1	Sports Fields Amenities (Base Set, Home Plate, Pitchers Rubber, Dugout Bench, Foul Poles, Batting Cage, Fence Cap, Pickleball Net Posts and Net, Goal Posts, Net Backstop System) (Furnish and Install)	\$	151,294.00			\$	-	\$	-	0%	\$	151,294.00	\$	-
D-2	Chain Link Fence - Softball Fields (Vinyl Coated Black) (With Fence Cap) (6-ft) (Furnish and Install)	\$	101,157.00			\$	-	\$	-	0%	\$	101,157.00	\$	-
D-3	Chain Link Fence With Windscreen (Vinyl Coated Black) (10-ft) (Furnish and Install)	\$	53,346.00			\$	-	\$	-	0%	\$	53,346.00	\$	-
D-4	Black Netting Backstop (25' Ht) (Furnish and Install)	\$	144,069.00			\$	-	\$	-	0%	\$	144,069.00	\$	-
D-5	Pedestrian Chain Link Fence Gate (Vinyl Coated Black) (3-ft Opening, 6-Ft) (Furnish and Install)	\$	3,157.44			\$	-	\$	-	0%	\$	3,157.44	\$	-
D-6	Double Swing Chain Link Fence Gate (Vinyl Coated Black) (12-ft Opening, 6-Ft) (Furnish and Install)	\$	2,786.68			\$	-	\$	-	0%	\$	2,786.68	\$	-
D-7	Bahia Sod for Disturbed Areas	\$	264,314.36			\$	-	\$	-	0%	\$	264,314.36	\$	-
D-8	Tennis Court Chain Link Fence Gate With Windscreen (Vinyl Coated Black) (4-ft Opening, 10-Ft) (Furnish and Install)	\$	1,500.00			\$	-	\$	-	0%	\$	1,500.00	\$	-
D-9	Litter Receptacle With Dome Lid	\$	37,582.95			\$	-	\$	-	0%	\$	37,582.95	\$	-
D-10	Bench	\$	79,620.84			\$	-	\$	-	0%	\$	79,620.84	\$	-
D-11	Bridge Foundation and Abutments	\$	46,800.00			\$	-	\$	-	0%	\$	46,800.00	\$	-
D-12	Pre-Fabricated Steel Bridge Installation	\$	-			\$	-	\$	-	NA	\$	-	\$	-
D-13	Pond Cypress 3" Cal., 12' Min. Ht., 6' Min. Sprd.	\$	6,505.20			\$	-	\$	-	0%	\$	6,505.20	\$	-
D-14	Southern Slash Pine 3" Cal., 12' Min. Ht., 6' Min. Sprd.	\$	8,673.60			\$	-	\$	-	0%	\$	8,673.60	\$	-
D-15	Maki Podocarpus 15 Gal., Full, 60" O.C.	\$	4,056.00			\$	-	\$	-	0%	\$	4,056.00	\$	-
D-16	Drake Chinese Elm 2.5" Cal., 10' Min. Ht., 4' Min. Sprd.	\$	30,357.60			\$	-	\$	-	0%	\$	30,357.60	\$	-
D-17	Dahoon Holly 2" Cal., 8' Min. Ht., 4' Min. Sprd	\$	22,406.80			\$	-	\$	-	0%	\$	22,406.80	\$	-
D-18	Red Maple 3" Cal., 10' Min. Ht., 5' Min. Sprd	\$	24,804.00			\$	-	\$	-	0%	\$	24,804.00	\$	-
D-19	Muskogee Crape Myrtle 8' Min. Ht., 4' Min. Sprd.	\$	22,896.00			\$	-	\$	-	0%	\$	22,896.00	\$	-
D-20	Cathedral Oak 6" Cal., 20' Min. Ht., 10' Min. Sprd.	\$	40,424.80			\$	-	\$	-	0%	\$	40,424.80	\$	-

D-21	Live Oak 3" Cal., 12' Min. Ht., 6' Min. Sprd.	\$ 54,568.80				\$ -	0%	\$ 54,568.80	\$ -
D-22	Twilight Crape Myrtle 8' Min. Ht., 4' Min. Sprd.	\$ 25,370.80				\$ -	0%	\$ 25,370.80	\$ -
D-23	Dynamite Crape Myrtle 8' Min. Ht., 4' Min. Sprd.	\$ 13,613.60				\$ -	0%	\$ 13,613.60	\$ -
D-24	Black Diamond Crape 8' Min. Ht., 4' Min. Sprd.	\$ 1,856.40				\$ -	0%	\$ 1,856.40	\$ -
D-25	Natchez Crape Myrtle 8' Min. Ht., 4' Min. Sprd.	\$ 14,851.20				\$ -	0%	\$ 14,851.20	\$ -
D-26	Cabbage Palm 16' - 26' Ct., Vary Heights, 32 SlickTrunks, 15' O.C. Where Clustered	\$ 16,473.60				\$ -	0%	\$ 16,473.60	\$ -
D-27	Silver Palmetto, 1 Gal., Full, 24" O.C.	\$ 29,452.80				\$ -	0%	\$ 29,452.80	\$ -
D-28	Cord Grass, 1 Gal., Full, 24" O.C.	\$ 4,278.97				\$ -	0%	\$ 4,278.97	\$ -
D-29	Swamp Sunflower, 1 Gal., Full, 24" O.C.	\$ 470.29				\$ -	0%	\$ 470.29	\$ -
D-30	Soft Rush, 1 Gal., Full, 24" O.C.	\$ 1,342.80				\$ -	0%	\$ 1,342.80	\$ -
D-31	Pickereelweed, 1 Gal., Full, 24" O.C.	\$ 2,400.94				\$ -	0%	\$ 2,400.94	\$ -
D-32	Bermuda 419 Grass (Baseball Fields and SoccerField)	\$ 268,734.18				\$ -	0%	\$ 268,734.18	\$ -
D-33	Baseball Infield Clay	\$ 45,963.57				\$ -	0%	\$ 45,963.57	\$ -
D-34	Irrigation	\$ 387,753.60	\$ 3,640.00	\$ -		\$ 3,640.00	1%	\$ 384,113.60	\$ 182.00
D-35	Seed and Mulch	\$ 3,812.14				\$ -	0%	\$ 3,812.14	\$ -
E-1	Basketball Court Pre- Engineered Roof and Columns (Furnish andInstall)	\$ 702,000.00				\$ -	0%	\$ 702,000.00	\$ -
E-2	Basketball Hoop Structures and Hoops (Furnish andInstall)	\$ 37,747.50				\$ -	0%	\$ 37,747.50	\$ -
E-3	Basketball Court Furnishings (Bleachers, Benches, Tables, WaterFountains) (Furnish and Install)	\$ 70,000.00				\$ -	0%	\$ 70,000.00	\$ -
E-4	Basketball Court Floor and Foundation IncludingColumn Footers (Furnish and Install)	\$ 283,920.00				\$ -	0%	\$ 283,920.00	\$ -
E-5	Riser Room Outside Basketball Courts (Furnish and Install)	\$ 46,000.00				\$ -	0%	\$ 46,000.00	\$ -
E-6	Basketball Courts Fire Protection System (Furnishand Install)	\$ 59,800.00				\$ -	0%	\$ 59,800.00	\$ -
E-7	Basketball Courts Plumbing(Water and Sewer) (Furnish and Install)	\$ 31,720.00				\$ -	0%	\$ 31,720.00	\$ -
E-8	Racquetball Court Block Walls, Door, Beams, Roof, and Foundation (Furnishand Install)	\$ 182,000.00				\$ -	0%	\$ 182,000.00	\$ -
E-9	Racquetball Court Floor (Furnish and Install)	\$ 83,200.00				\$ -	0%	\$ 83,200.00	\$ -
F-1	Electrical Panels and Field Lighting Cabinet, ServiceRack, Power Rack (Furnish and Install)	\$ 35,360.00	\$ 11,600.00	\$ -		\$ 11,600.00	33%	\$ 23,760.00	\$ 580.00
F-2	Misc. Electrical Including Conduit, Wire, and Appurtenances (Furnishand Install)	\$ 150,111.20	\$ 12,064.00	\$ -		\$ 12,064.00	8%	\$ 138,047.20	\$ 603.20
F-3	Transformer - Coordinate With Duke Energy (Duke Energy to install Transformer, Pad,Conduits, Pedestal and Appurtenances)	\$ 2,000.00				\$ -	0%	\$ 2,000.00	\$ -
F-4	Parking Lot Lights - Coordinate With Duke Energy (Duke Energy to furnish and install parking lot lights including poles, fixtures, foundation, connecting conduits, wires etc.)	\$ 2,000.00				\$ -	0%	\$ 2,000.00	\$ -
F-5	Street Lights - Coordinate With Duke Energy (Duke Energy to furnish and install parking poles, fixtures, foundation, connecting conduits, wires Etc.)	\$ 2,000.00				\$ -	0%	\$ 2,000.00	\$ -
F-6	Community Center Area Lights - Coordinate with Duke Energy - Duke Energy to furnish and install new fixtures (the new fixtures are to match those proposed with the internal roadway network).	\$ 2,000.00				\$ -	0%	\$ 2,000.00	\$ -
F-7	Single point connection for concession stand, fed from panel lpc-2,4. Verify exact location with owner for power source to enter the Concession stand. Provide 120/208v, 3 ph, 125a load center and coordinate load Locations with the City.	\$ 9,286.16				\$ -	0%	\$ 9,286.16	\$ -
F-8	Furnish and install 20a, weather proof gfc receptacle in each Dugout. Coordinate with the City on the exact location. Receptacles to be Fed out of panel lpc, (ckt-1).	\$ 5,087.68				\$ -	0%	\$ 5,087.68	\$ -
F-9	Basketball Court Electrical and Lighting, ControlBoxes, Etc. (Furnish and Install)	\$ 71,148.48				\$ -	0%	\$ 71,148.48	\$ -
F-10	Tennis Court Electrical andLighting Control Boxes, Etc. (Furnish and Install)	\$ 67,868.32				\$ -	0%	\$ 67,868.32	\$ -
ALT- 1	Concrete Ribbon Curb	\$ 110,279.40				\$ -	0%	\$ 110,279.40	\$ -
ALT- 2	Three Rail Wood Fence (4 ft) (Furnish and Install) (Onsite Between the GrassParking area and the new Trail)	\$ 20,236.32				\$ -	0%	\$ 20,236.32	\$ -
ALT- 3	Compost/Organic Mix for Topsoil	\$ 26,790.40				\$ -	0%	\$ 26,790.40	\$ -
D-36	CO#1 Removal of Existing Irrigation Lines	\$ 4,748.45	\$ 4,748.45	\$ -		\$ 4,748.45	100%	\$ -	\$ 237.42
	Grand Totals	\$ 10,650,393.53	\$ 3,061,423.53	\$ 262,177.69	\$ -	\$ 3,323,601.22	31%	\$ 7,326,792.32	\$ 166,180.06

CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Approval of Award to Kingdom Construction for Downtown Trash Compactor Enclosure in the Amount of \$55,278

REQUESTED ACTION: Staff recommends approval.

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

BUDGET IMPACT: Funding for this project will be allocated from 301-541-60-6318

HISTORY/FACTS/ISSUES:

As part of the Downtown Master Plan, the City has been coordinating with Waste Management and Kimley-Horn to complete the installation of a trash compactor that will serve businesses along Rutland Street. This enclosed unit will significantly reduce waste volume, lower collection frequency, minimize disposal costs, and lessen environmental impacts.

Kimley-Horn was retained to provide design and bidding services. The project was advertised; however, no bids were received. Due to time constraints related to the ongoing construction of the new Railyard project, staff reached out to G3 Development and Kingdom Construction for proposals. Each contractor provided the requested proposal.

Kimley-Horn has reviewed the proposals and recommends approval of the Kingdom Construction proposal as the lowest qualified bid, in the amount of \$55,278.



August 13, 2025

Jeremy Hockenbury
Public Works Director
City of Wildwood
743 Huey Street
Wildwood, FL 34785

RE: *Wildwood Downtown Trash Compactor*

Dear Mr. Hockenbury,

This letter is to confirm that we have reviewed the contractor's proposal submitted by Kingdom Construction. We recommend that the City approve this proposal. We also recommend that Public Works Department handle the striping and signing tasks to save costs.

Please feel free to contact our office if you have any questions.

Sincerely,

KIMLEY-HORN

A blue ink handwritten signature, appearing to read 'Mohammed N. Murad', with a stylized flourish at the end.

Mohammed N. Murad, PE

MNM/DFH/mcc

Attachments:

cc: File

K:\OCA_Civil\242297003-Sweet Six Design and Permitting\doc\Permitting\City of Wildwood\2025-08-13 Response\Lcg250813mnm.docx

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 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.
7. 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.
8. The undersigned further agrees that the UNIT PRICES submitted on the Bid Form will expire if a contract is not executed within one hundred twenty (120) days from the date of bid deadline, and that the Contractor will be fully released from any obligations of this Bid Form.
9. The undersigned agrees that this bid is based on substantially completing the project within ninety (90) calendar days and final completion within one hundred twenty (120) calendar days from the date of Notice to Proceed. The Contractor further agrees to pay, as liquidated damages, the sum of five hundred (\$500) dollars for each consecutive calendar day thereafter.
10. The Bidder acknowledges having received the following project addenda:

No. _____, Date: _____	No. _____, Date: _____
No. _____, Date: _____	No. _____, Date: _____
No. _____, Date: _____	No. _____, Date: _____
11. 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.

DOWNTOWN COMPACTOR BID FORM						
BID NUMBER	FDOT PAY ITEM NUMBER	ITEM DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	AMOUNT
GENERAL IMPROVEMENTS						
1	101-1	MOBILIZATION	1	LS	\$ 3,000.00	\$ 3,000.00
2	n/a	COMPACTOR WALL ENCLOSURE	1	LS	\$ 47,328.00	\$ 47,328.00
3	0522-2	CONCRETE PAD	20	SY	\$ 120.00	\$ 2,400.00
4	0522-1	SIDEWALK	15	SY	\$ 80.00	\$ 1,200.00
5	0520-1-10	CURB	45	LF	\$ 30.00	\$ 1,350.00
6	0711-11125	STOP BAR STRIPE	20	FT	\$	\$
7	0711-11160	"STOP" MARKING	1	LS	\$	\$
8	0710-11101	6" WHITE PARKING STRIPE	100	FT	\$	\$
9	0700-1500	RELOCATE EXISTING SIGN	1	LS	\$	\$
10	0527-2	DETECTABLE WARNING MAT	1	LS	\$	\$
SUBTOTAL FOR PROJECT =						\$ 55,278.00
PAYMENT AND PERFORMANCE BOND =						\$ NO
BID GRAND TOTAL =						\$ 55,278.00

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: \$ 55,278.00

WORDS: FIFTY-FIVE THOUSAND, TWO HUNDRED AND SEVENTY EIGHT DOLLARS & NO CENTS

THIS PROPOSAL DATED THIS 13 day of AUGUST, 2025.

ATTEST:

Witness:


Signature

Karrie Fitzgerald
Printed Name

By:



Authorized Signature (Principal)

IAN NICHOLS, PRESIDENT
Printed Name, Title

KINGDOM CONSTRUCTION
Company Name

Address:

1102 N MAIN STREET SUITE E

WILDWOOD FL 34785

Employee I.D. No.

CGC1524839

Florida State Certified General
Contractor's License Number

Telephone Number: 352-600-1289

END OF SECTION



SPECIFICATIONS

DOWNTOWN COMPACTOR



City of Wildwood, Florida

March 2025

Kimley-Horn Project No. 142173000

© 2025 Kimley-Horn and Associates, Inc.
1700 SE 17th Street, Suite 200
Ocala, Florida 34471
352 438-3000 TEL

Kimley»Horn

**DOWNTOWN COMPACTOR
BID FORM**

BID NUMBER	FDOT PAY ITEM NUMBER	ITEM DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	AMOUNT
GENERAL IMPROVEMENTS						
1	101-1	MOBILIZATION	1	LS	\$ 10,000. ⁰⁰	\$ 10,000. ⁰⁰
2	n/a	COMPACTOR WALL ENCLOSURE	1	LS	\$ 70,000. ⁰⁰	\$ 70,000. ⁰⁰
3	0522-2	CONCRETE PAD	20	SY	\$ 750. ⁰⁰	\$ 15,000. ⁰⁰
4	0522-1	SIDEWALK	15	SY	\$ 800. ⁰⁰	\$ 12,000. ⁰⁰
5	0520-1-10	CURB	45	LF	\$ 100. ⁰⁰	\$ 4,500. ⁰⁰
6	0711-11125	STOP BAR STRIPE	20	FT	\$ 100.⁰⁰	\$ 2,000.⁰⁰
7	0711-11160	"STOP" MARKING	1	LS	\$ 1,000.⁰⁰	\$ 1,000.⁰⁰
8	0710-11101	6" WHITE PARKING STRIPE	100	FT	\$ 8.⁰⁰	\$ 800.⁰⁰
9	0700-1500	RELOCATE EXISTING SIGN	1	LS	\$ 400.⁰⁰	\$ 400.⁰⁰
10	0527-2	DETECTABLE WARNING MAT	1	LS	\$ 1,350.⁰⁰	\$ 1,350.⁰⁰
SUBTOTAL FOR PROJECT =						\$ 117,050.⁰⁰
PAYMENT AND PERFORMANCE BOND =						\$ 20,000.⁰⁰
BID GRAND TOTAL =						\$ 137,050.⁰⁰

Items to be
compelled by
Public Works

\$ 111,500.00
Adjusted Total

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: \$ 137,050.⁰⁰

WORDS: One hundred & thirty Seven thousand & fifty Dollars ⁰⁰

THIS PROPOSAL DATED THIS 14th day of July, 2025.

ATTEST:

Witness:

Signature

Caycee Fairbanks
Printed Name

By:

Authorized Signature (Principal)

Bryan Carracielo - President
Printed Name, Title

BWC Construction
Company Name

Address:

4330 W US Hwy 441 #1
Ocala, FL. 34475

Employee I.D. No.

47-2379584
CGC 1522862
Florida State Certified General
Contractor's License Number

Telephone Number:

352-304-1323

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 287.133 (3)(a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES - THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to the City of Wildwood by

Bryan Caracero - President
(Print Name and Title)

This sworn statement is submitted by BBC Construction
(Print Name of Entity Submitting Sworn Statement)

Whose business address is: 4330 N. US HWY 441 #1
Ocala FL 34475

and (if applicable) its Federal Employer Identification Number (FEIN) is 47-2379584
(If entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _____)

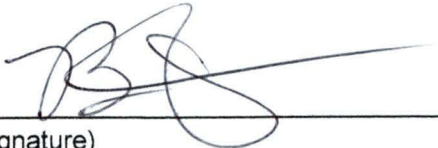
2. I understand that a "public entity crime" as defined in Section 287.133 (1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other 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 Section 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, non-jury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that an "affiliate" as defined in Section 287.133 (1)(a), Florida Statutes, means: A predecessor or successor of a person convicted of a public entity crime; or 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.

5. I understand that a "person" as defined in Section 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.
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 _____ 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)



(Bidder Signature)

7/14/25

(Date)

NOTARY PUBLIC

STATE OF FLORIDA

COUNTY OF: Marion

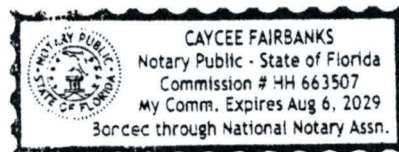
Personally appeared before me, the undersigned authority, Bryan Caracciolo who affixed his/her signature in the space provided above on this 14 day of July, 2025.



(Signature Notary Public)

My commission expires: Aug 6, 2029

(Seal)



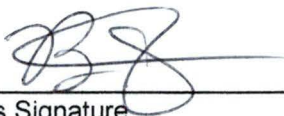
END OF SECTION

SECTION 00303 – DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with the Florida Statute 287.087 hereby certifies that
BCC Construction 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

7/14/25

Date

END OF SECTION

SECTION 00304 - 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: BWC Construction

Print Name: Bryan Caracciolo Title: President

Signature: [Signature] Date: 7/14/25

State of Florida

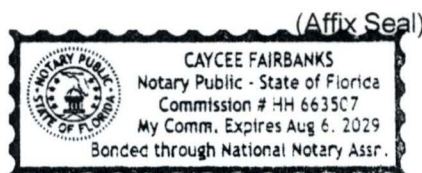
County of Marion

The foregoing instrument was signed and acknowledged before me this 14 day of July, 2025, by Bryan Caracciolo who ☒ is personally known to me or ☐ has produced _____ as identification.

[Signature]
(Notary Signature)

Caycee Fairbanks
(Print or Type Name)

Aug 6, 2029
(Commission Expiration Date)



The signee of this affidavit guarantees, as evidenced by the affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

END OF SECTION

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: CR 501 WTP Iron Filter Project Pay Application No. 6 to SGS Contracting Services, Inc for the Amount of \$314,890.80

REQUESTED ACTION: Staff Recommends Approval

CONTRACT: Vendor/Entity: SGS Contracting Services, Inc.
Effective Date: 08/14/2025 Termination Date:
Managing Division/Department: Utility Department / Water Division

BUDGET IMPACT: This is a budgeted capital project with funds available in account 408-533-70-7351 (501 WTP Iron Filtration).

HISTORY/FACTS/ISSUES:

In August 2024, the City awarded the 501 Water Treatment Plant Iron Filter project to SGS Contracting. This is Pay Application No. 6 for the amount of \$314,890.80. The City's reviewing engineer, Kimley Horn, and staff have reviewed the pay application and recommend approval to pay SGS Contracting Services, Inc. the requested amount of \$314,890.80.

Contractor's Application for Payment No.

6

Application Period: 7/1/25-7/31/25		Application Date: 7/31/25	
To (Owner): City of Wildwood	From (Contractor): SGS Contracting Services, Inc.	Via (Engineer): Kimley-Horn	
Project: CR 501 WTP Iron Filter Improvements	Contract:		
Owner's PO No.:	Contractor's Project No.: 2024-010	Engineer's Project No.:	

**Application For Payment
Change Order Summary**

Approved Change Orders		
Number	Additions	Deductions
1		\$1,006,872.42
TOTALS	\$0.00	\$1,006,872.42
NET CHANGE BY CHANGE ORDERS	-\$1,006,872.42	

1. ORIGINAL CONTRACT PRICE.....	\$	\$2,715,700.00
2. Net change by Change Orders.....	\$	-\$1,006,872.42
3. Current Contract Price (Line 1 ± 2).....	\$	\$1,708,827.58
4. TOTAL COMPLETED AND STORED TO DATE (Column F on Progress Estimate).....	\$	\$806,230.52
5. RETAINAGE:		
a. 5% X \$723,526.36 Work Completed.....	\$	\$36,176.32
b. 5% X \$82,704.16 Stored Material.....	\$	\$4,135.21
c. Total Retainage (Line 5a + Line 5b).....	\$	\$40,311.53
6. AMOUNT ELIGIBLE TO DATE (Line 4 - Line 5c).....	\$	\$765,918.99
7. LESS PREVIOUS PAYMENTS (Line 6 from prior Application).....	\$	\$451,028.19
8. AMOUNT DUE THIS APPLICATION.....	\$	\$314,890.80
9. BALANCE TO FINISH, PLUS RETAINAGE (Column G on Progress Estimate + Line 5 above).....	\$	\$942,908.59

Contractor's Certification

The undersigned Contractor certifies that to the best of its knowledge: (1) all previous progress payments received from Owner on account of Work done under the Contract have been applied on account to discharge Contractor's legitimate obligations incurred in connection with Work covered by prior Applications for Payment; (2) title of all Work, materials and equipment incorporated in said Work or otherwise listed in or covered by this Application for Payment will pass to Owner at time of payment free and clear of all Liens, security interests and encumbrances (except such as are covered by a Bond acceptable to Owner indemnifying Owner against any such Liens, security interest or encumbrances); and (3) all Work covered by this Application for Payment is in accordance with the Contract Documents and is not defective.

By:

Lindsey Magura

Date:

7/31/2025

Payment of:

\$ 314,890.80

is recommended by: _____

Payment of: \$ _____

is approved by: _____

Approved by: _____

Kimley»Horn

- ☒ NO EXCEPTIONS TAKEN
- ☐ CORRECTIONS NOTED
- ☐ REJECTED
- ☐ VERIFY & MAKE CORRECTIONS
- ☐ RESUBMIT
- ☐ FOR INFORMATION ONLY

Our limited review is only for conformance with the design concept of the project and general compliance with the information given in our Plans and Specifications. Contractor is responsible for: dimensions to be confirmed and correlated at the job site, information that pertains to the fabrication processes or to techniques of construction, quantities, safety, coordination with other work, and for conformance to the requirements of the plans and specifications. Review does not authorize changes to contract unless stated specifically in separate letter or change order.

Reviewed By: HEATH.SMITH Date: 8/5/25

For (Contract):		CR 501 WTP Ion Filter Improvements		Application Number: 6				
Application Period: 7/1/25-7/31/25				Application Date: 7/31/25				
			Work Completed		E	F	G	
A		B	C	D	Materials Presently Stored (not in C or D)	Total Completed and Stored to Date (C + D + E)	% (# / B)	Balance to Finish (B - F)
	Description	Scheduled Value (\$)	From Previous Application (C+D)	This Period				
1.01	MOBILIZATION							
1.01.01	Mobilization	\$40,000.00	\$40,000.00			\$40,000.00	100%	\$0.00
1.01.02	Demobilization	\$10,000.00				\$0.00		\$10,000.00
1.01.03	Prepaid Bonds & Insurance	\$20,000.00	\$20,000.00			\$20,000.00	100%	\$0.00
1.02	SURVEY, LAYOUT, PERMITTING, RECORD DRAWINGS							
1.02.01	Permitting	\$3,000.00				\$0.00		\$3,000.00
1.02.02	Survey & Layout (General)	\$4,000.00	\$2,000.00			\$2,000.00	50%	\$2,000.00
1.02.03	Record Drawings	\$3,000.00				\$0.00		\$3,000.00
1.03	RESTORATION							
1.03.01	Clearup, Final Grade, Misc. Sod/Grassing	\$10,000.00				\$0.00		\$10,000.00
2.01	INSTALL NEW GREENSAND FILTER (INCL. ALL PIPE) FOR FUNCTIONAL SYSTEM							
2.01.01	Site Prep	\$10,000.00	\$10,000.00			\$10,000.00	100%	\$0.00
2.01.02	Gravel Around Tanks	\$15,000.00				\$0.00		\$15,000.00
2.01.03	Concrete Pedestals	\$50,000.00	\$50,000.00			\$50,000.00	100%	\$0.00
2.01.04	Misc. Protective Coatings	\$10,000.00				\$0.00		\$10,000.00
2.01.05	Furnish Filter System (Materials/Equipment only)	\$1,006,872.42				\$0.00		\$1,006,872.42
2.01.06	Installation of Filter System	\$498,127.58		\$300,000.00		\$300,000.00	60%	\$198,127.58
2.01.07	Filter System Testing & Startup	\$15,000.00				\$0.00		\$15,000.00
2.01.08	Furnish & Install Pipe, Valves, Fittings, Appurtenances	\$150,000.00	\$106,901.36	\$30,000.00		\$136,901.36	91%	\$13,098.64
2.01.09	Install Control & Power Equipment (related to Filter System only)	\$35,000.00				\$0.00		\$35,000.00
2.01.10	Approval of Filter System (including documentation)	\$10,000.00				\$0.00		\$10,000.00
2.02	SITE YARD PIPING							
2.02.01	Yard Piping for Water Main Connection	\$24,575.00				\$0.00		\$24,575.00
2.02.02	Drain Piping to Pond	\$12,000.00				\$0.00		\$12,000.00
2.02.03	Buried Chlorine Injection Piping	\$10,000.00				\$0.00		\$10,000.00
2.02.04	Buried Corrosion Inhibitor Piping	\$10,000.00				\$0.00		\$10,000.00
2.02.05	Buried Service Water Piping	\$12,000.00				\$0.00		\$12,000.00
2.03	INSTALL NEW MOTORIZED ACTUATOR							
2.03.01	Furnish & Install New Motorized Actuator	\$28,000.00				\$0.00		\$28,000.00
2.03.02	Startup of Actuator	\$2,000.00				\$0.00		\$2,000.00
2.04	SITework							
2.04.01	Misc. Sitework	\$5,000.00				\$0.00		\$5,000.00
2.05	SODIUM HYPOCHLORITE SYSTEM							
2.05.01	Furnish & Install Sodium Hypo System	\$49,000.00			\$48,120.00	\$48,120.00	98%	\$880.00
2.05.02	Startup & Testing	\$1,000.00				\$0.00		\$1,000.00
2.06	SODIUM HYPOCHLORITE SYSTEM INJECTION VAULT							
2.06.01	Demolish/Remove Existing Vault & Appurtenances	\$10,000.00				\$0.00		\$10,000.00
2.06.02	Furnish & Install New Vault	\$37,000.00			\$2,710.70	\$2,710.70	7%	\$34,289.30
2.06.03	Furnish & Install New Injection Point	\$3,000.00				\$0.00		\$3,000.00
2.07	SODIUM HYPOCHLORITE STORAGE STRUCTURE							
2.07.01	Site Prep & Concrete Pad	\$15,000.00	\$15,000.00			\$15,000.00	100%	\$0.00
2.07.02	Furnish & Install Canopy Structure	\$35,000.00	\$35,000.00			\$35,000.00	100%	\$0.00
2.08	CORROSION INHIBITOR SYSTEM							
2.08.01	Furnish & Install Corrosion Inhibitor System	\$32,000.00			\$9,805.00	\$9,805.00	31%	\$22,195.00
2.08.02	Startup & Testing	\$3,000.00				\$0.00		\$3,000.00
2.09	CORROSION INHIBITOR VAULT							
2.09.01	Furnish & Install New Vault	\$17,000.00			\$6,137.17	\$6,137.17	36%	\$10,862.83
2.09.02	Furnish & Install New Injection Point	\$3,000.00				\$0.00		\$3,000.00
2.10	CORROSION INHIBITOR							

[illegible]

Progress Estimate - Unit Price Work

Contractor's Application

[illegible]

Stored Material Summary

Contractor's Application

[illegible]

CITY COMMISSION OF THE CITY OF WILDWOOD
EXECUTIVE SUMMARY

SUBJECT: Easement Agreement with Lot 2 Turkey Run

REQUESTED ACTION: Staff Recommends Approval

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

The attached agreement grants the City easements for the construction of a reclaimed water line. This segment of easement is associated with the Millennium Park reuse water line needed to irrigate the park and to help dispose of treated effluent at the wastewater treatment plant. In consideration for the easement, the City agrees to install a stub-out connection for reclaimed water for the benefit of the grantor.

This Instrument Prepared By
and Return to:

Ashley S. Hunt, Esq.
Hunt Law Firm, P.A.
601 S. 9th Street
Leesburg, Florida 34748

Property Appraisers Parcel (Folio)
Identification Number(s): **G05V002**

TEMPORARY CONSTRUCTION EASEMENT

THIS TEMPORARY CONSTRUCTION EASEMENT (“Agreement”) is made as of the Effective Date (hereinafter defined) by and between **PROVIDENCE ASSISTED REAL ESTATE, LLC**, a foreign limited liability company, whose post office address is c/o CCM US LLC, 1730 Massachusetts Avenue, NW, Washington, DC 20036 (“hereinafter referred to as “**Grantor**”), and the **CITY OF WILDWOOD**, whose post office address is 100 N. Main Street, Wildwood, Florida, 34785 (hereinafter referred to as “**Grantee**”).

1. Construction Easement. Grantor does hereby grant and convey to Grantee a temporary easement (the “Construction Easement”) over that certain land situated in Sumter County, Florida, which is more particularly described and illustrated on Exhibit “A” (the “Easement Area”) for the construction and installation of the underground reclaimed water and reuse water utility lines, pipes and related improvements described above (the “Easement Improvements”), all on the terms and conditions set forth in this Easement. The Construction Easement shall be limited to a temporary easement for the construction and installation and maintenance of underground reclaimed water and reuse water utility lines, pipes and related improvements reasonably necessary for the conveyance and distribution of reclaimed water and reuse water, including any underground necessary fixtures and equipment and accessories necessary in connection therewith. Such rights shall include, but not limited to, the right to enter the Easement Area for purposes of clearing the Easement Area of vegetation or any other encroachment, and to excavate and construct pipelines and related improvements within the Easement Area. Grantee shall not make any use of the Easement Area which is or would be a nuisance or unreasonably detrimental to the construction, use or operation of the Grantor’s property. All rights not reasonably necessary hereunder are expressly reserved to Grantor. Nothing contained in this Easement Area shall be deemed to constitute a grant or dedication to the general public or for any public purpose whatsoever.

2. Duration of Easement. All covenants, rights and obligations related to the Easement Area shall automatically terminate upon the earlier of (i) the completion of the Construction Project or (ii) twenty-four (24) months from the Effective Date hereof, unless sooner terminated as provided herein or extended by the mutual consent of the parties hereto (“Termination”). Upon

Termination, this Agreement shall be deemed null and void and of no further force or effect and the parties hereto shall be relieved of any further rights and obligations hereunder.

3. All Easement Improvements shall be constructed by a general contractor properly licensed in the State of Florida (the “Contractor”), in a good and workmanlike manner, and in accordance with plans and specifications prepared by a licensed civil engineering firm (the “Plans”). The Plans shall be consistent in all material respects with the Plat, and shall be prepared at no expense to Grantor. Grantee will share a copy of the plans with Grantor and will, in good faith, review any comments from the Grantor regarding concerns related to said plans. However, nothing herein shall be construed as requiring the Grantee to receive approval from Grantor with respect to the plans.

4. Grantee anticipates construction starting within the one hundred and twenty (120) days from the execution of this Easement. Grantee will share a schedule of construction with the Grantor and keep the Grantor apprised of any changes to said schedule.

5. Grantee, Contractor and their respective assigns and subcontractors shall comply, at no expense to Grantor, with all applicable federal, state and local laws, rules, regulations, statutes, codes, orders and ordinances applicable to the construction of the Easement Improvements, including but not limited to all erosion control ordinances.

6. Grantee shall not suffer or permit anything to be done that will cause the Easement Area or Grantor’s adjacent property to become encumbered by any mechanic’s lien or similar lien, charge or claim in connection with the construction of the Easement Improvements. If any mechanic’s lien or claim is filed against the Grantor’s property, Grantee shall discharge such lien (by bonding or otherwise) within ten (10) days after receipt of notice of filing.

7. Grantee will require Contractor to meet and maintain Grantee’s standard insurance requirements for coverage during the construction of the Easement Improvements. Grantee shall require that Contractor designate Grantor as an additional insured.

8. In consideration for the Easement, the Grantee hereby agrees to install, during the exercise of its Construction Easement, and provide Grantor with a stub-out connection for reclaimed water and reuse water for the benefit of Grantor’s Property at a location approved by Grantor and to be shown on the Plans.

9. Grantor and Grantee have agreed that a permanent easement shall be located in within the existing utility easement previously granted to Grantee. The Grantor agrees and warrants that the granting of the permanent easement will not affect the buildable area of Grantor’s remaining property or any applicable setbacks and approvals for the same.

10. The effective date of this Agreement shall be the date upon which the last of the parties hereto executes this Agreement (“Effective Date”).

IN WITNESS WHEREOF, the Grantor has hereunto set its Hand and Seal the day and year first above written.

Signed, Sealed and Delivered in the presence of:

“GRANTOR”

**Providence Assisted Real Estate, LLC, a
foreign limited liability company**

Witness Signature

By:

Print/Typed Witness Name

Its:

Address

Witness Signature

Print/Typed Witness Name

Address

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization, this ____ day of August, 2025, by _____, as _____ of Providence Assisted Real Estate, LLC, a foreign limited liability company who is _____ personally known to me, or who produced _____ as identification and who did (did not) take an oath.

My Commission Expires:

Notary Public Signature

Print/Type Name of Notary

Commission No. ____

“GRANTEE”

**CITY OF WILDWOOD, FLORIDA, a Florida
Municipal Corporation**

By: _____

Title: _____

Date: August __, 2025

ATTEST:

_____, CITY CLERK

**APPROVED BY THE WILDWOOD CITY
COMMISSION ON August __, 2025.**

SKETCH FOR DESCRIPTION
(NOT A FIELD SURVEY)

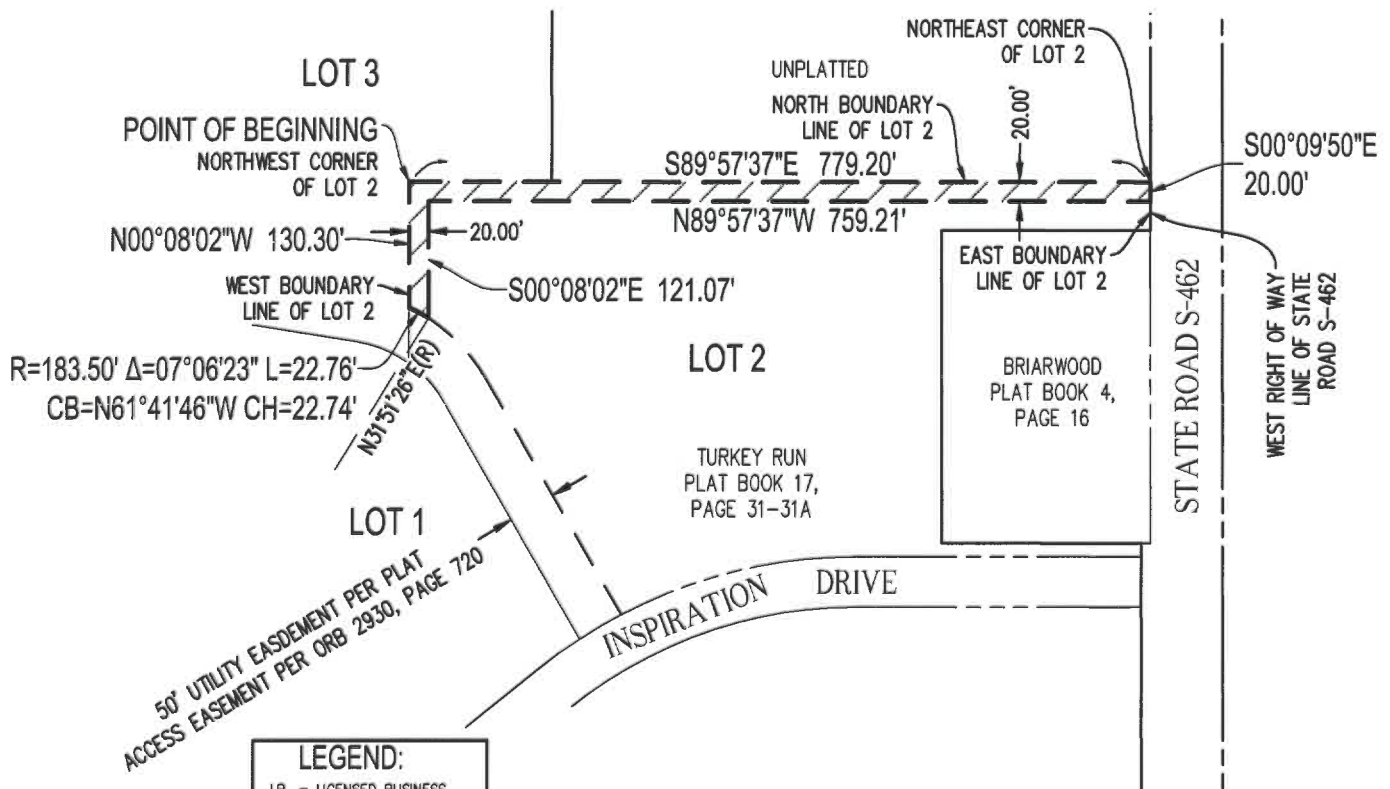
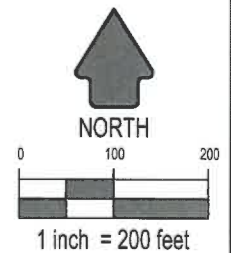
TURKEY RUN LOT 2 EASEMENT

EXHIBIT " "
SHEET 1 OF 1

LEGAL DESCRIPTION

A TWENTY (20) FOOT STRIP OF LAND BEING A PORTION OF LOT 2, TURKEY RUN, ACCORDING TO THE PLAT THEREOF AS RECORDED IN PLAT BOOK, 17, PAGES 31 AND 31A, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA. SAID STRIP BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGIN AT THE NORTHWEST CORNER OF AFORESAID LOT 2; THENCE ALONG THE NORTH BOUNDARY LINE THEREOF RUN S89°57'37"E, 779.20 FEET TO THE NORTHEAST CORNER OF SAID LOT 2; THENCE ALONG THE EAST BOUNDARY LINE THEREOF AND THE WEST RIGHT OF WAY LINE OF STATE ROAD S-462 RUN S00°09'50"E, 20.00 FEET TO A POINT ON A LINE LYING 20.00 FEET SOUTH OF AFORESAID NORTH BOUNDARY LINE OF LOT 2; THENCE DEPARTING SAID EAST BOUNDARY LINE AND WEST RIGHT OF WAY LINE RUN N89°57'37"W PARALLEL WITH SAID NORTH BOUNDARY LINE A DISTANCE OF 759.21 FEET TO A POINT ON A LINE LYING 20.00 FEET EAST OF THE WEST BOUNDARY LINE OF SAID LOT 2; THENCE S00°08'02"E PARALLEL WITH SAID WEST BOUNDARY LINE A DISTANCE OF 121.07 FEET TO A POINT ON THE ARC OF A NON-TANGENT CURVE CONCAVE SOUTHWESTERLY, HAVING A RADIUS OF 183.50 FEET AND A CHORD BEARING AND DISTANCE OF N61°41'46"W, 22.74 FEET TO WHICH A RADIAL LINE BEARS N31°51'26"E; SAID POINT ALSO BEING ON THE NORTHEASTERLY LINE OF 50.00 FOOT UTILITY EASEMENT PER PLAT AND AN ACCESS EASEMENT PER OFFICIAL RECORDS BOOK 2930, PAGE 720, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA; THENCE ALONG SAID EASEMENT RUN NORTHWESTERLY ALONG THE ARC OF SAID CURVE, THROUGH A CENTRAL ANGLE OF 07°06'23", AN ARC DISTANCE OF 22.76 FEET TO THE AFORESAID WEST BOUNDARY LINE OF LOT 2; THENCE ALONG SAID WEST BOUNDARY LINE RUN N00°08'02"W, 130.30 FEET TO THE POINT OF BEGINNING.



LEGEND:

LB = LICENSED BUSINESS
(R) = RADIAL
Δ = CENTRAL ANGLE
R = RADIUS
L = ARC LENGTH
CB = CHORD BEARING
CH = CHORD LENGTH
ORB = OFFICIAL RECORDS BOOK
PG = PAGE

GENERAL NOTES:

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3. BEARINGS ARE BASED ON THE RECORD PLAT OF TURKEY RUN PER PLAT BOOK 17, PAGES 31-31A, PUBLIC RECORDS OF SUMTER COUNTY, FLORIDA. AS A REFERENCE FOR THIS SKETCH, THE NORTH BOUNDARY LINE OF LOT 2 HAS A BEARING OF S89°57'37"E.

8/13/24
DATE

KAYE M. JAMESON - PROFESSIONAL SURVEYOR & MAPPER
FLORIDA REGISTRATION NO. 5912

JOB SP2024.03382



This Instrument Prepared By
and Return to:

Ashley S. Hunt, Esq.
Hunt Law Firm, P.A.
601 S. 9th Street
Leesburg, Florida 34748

Property Appraisers Parcel (Folio)
Identification Number(s): **G05V002**

NON-EXCLUSIVE UTILITY EASEMENT
(Reclaimed and Reuse Water)

THIS INDENTURE, made this _____ day of August, 2025, between **PROVIDENCE ASSISTED REAL ESTATE, LLC**, a foreign limited liability company, whose post office address is c/o CCM US LLC, 1730 Massachusetts Avenue, NW, Washington, DC 20036 (“hereinafter referred to as “**Grantor**”), and the **CITY OF WILDWOOD**, whose post office address is 100 N. Main Street, Wildwood, Florida, 34785 (hereinafter referred to as “**Grantee**”).

WITNESSETH:

That for and in consideration of the sum of Ten Dollars (\$10.00) in hand paid by the Grantee, the receipt whereof is hereby acknowledged, and in consideration of the conditions and covenants contained herein, the Grantor does grant and convey, as hereinafter set forth, to the Grantee a non-exclusive utility easement only for reclaimed water and reuse water (collectively, the “**Easement**”), in and upon that certain land situated in Sumter County, Florida, which is more particularly described and illustrated on **Exhibit “A”** attached hereto (the “**Plat**”) and by this reference made a part hereof (the “**Easement Area**”).

The Easement and Grantee’s use of the Easement Area shall be limited to, an easement for the use and maintenance and repair in perpetuity of underground reclaimed water and reuse water utility lines, pipes and related improvements reasonably necessary for the conveyance and distribution of reclaimed water and reuse water, including any underground necessary fixtures and equipment and accessories necessary in connection therewith.

Grantor does hereby grant and convey to Grantee a permanent utility easement (the “**Permanent Easement**”) over the Easement Area for the sole purpose of operating and maintaining an underground reclaimed water and reuse water line, in such locations as are shown on the Plat. In connection therewith, Grantee shall have the continuing right to come onto the Easement Area to patrol, inspect, and maintain, such reclaimed water and reuse water utility lines and related equipment, structures and accessories

Grantor shall have the right to use the surface of the Easement Area to install and maintain, at its sole cost and expense, landscaping and shrubbery, and irrigation within the Easement Area, provided that same shall not impair the rights of the Grantee, nor the purpose of the Easement granted hereunder. Grantee’s written permission shall be required before any permanent or temporary structures are placed within the Easement Area by the Grantor. Furthermore, Grantor agrees it will not use trees or landscaping with taproot systems which would interfere with the utility facilities in the Easement Area.

Grantor further covenants with Grantee that it is lawfully seized of the Easement Area which is free and clear of all encumbrances and that Grantor has good, right and lawful authority to grant the easement described herein, and that it fully warrants that it has title to the Easement Area described herein and will defend the same against lawful claims of all persons whomsoever.

In consideration for the Easement, the Grantee hereby agrees to install, during the exercise of its Construction Easement, Grantor with a stub-out connection for reclaimed water and reuse water for the benefit of Grantor’s Property at a location approved by Grantor and to be shown on the Plans. Grantor and Grantee have agreed that the Permanent

Easement shall be located in within the existing utility easement previously granted to Grantee. The Grantor agrees and warrants that the granting of the Permanent Easement will not affect the buildable area of Grantor's remaining property or any applicable setbacks and approvals for the same.

The terms and conditions of this Easement shall be deemed covenants and conditions running with title to the Easement Area. All covenants, terms, provisions and conditions herein contained shall inure and extend to and be obligatory upon the successors, lessees and assigns of the respective parties hereto.

IN WITNESS WHEREOF, the Grantor has hereunto set its Hand and Seal the day and year first above written.

Signed, Sealed and Delivered in the presence of:

"GRANTOR"

Providence Assisted Real Estate, LLC, a foreign
limited liability company

Witness Signature

Print/Typed Witness Name

Address

By: _____

Its: _____

Witness Signature

Print/Typed Witness Name

Address

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization, this ____ day of August, 2025, by _____, as _____ of Providence Assisted Real Estate, LLC, a foreign limited liability company who is _____ personally known to me, or who produced _____ as identification and who did (did not) take an oath.

My Commission Expires:

Notary Public Signature

Print/Type Name of Notary

Commission No. _____

“GRANTEE”

**CITY OF WILDWOOD, FLORIDA, a Florida
Municipal Corporation**

By: _____

Title: _____

Date: August __, 2025

ATTEST:

_____, CITY CLERK

**APPROVED BY THE WILDWOOD CITY
COMMISSION ON August __, 2025.**

SKETCH FOR DESCRIPTION
(NOT A FIELD SURVEY)

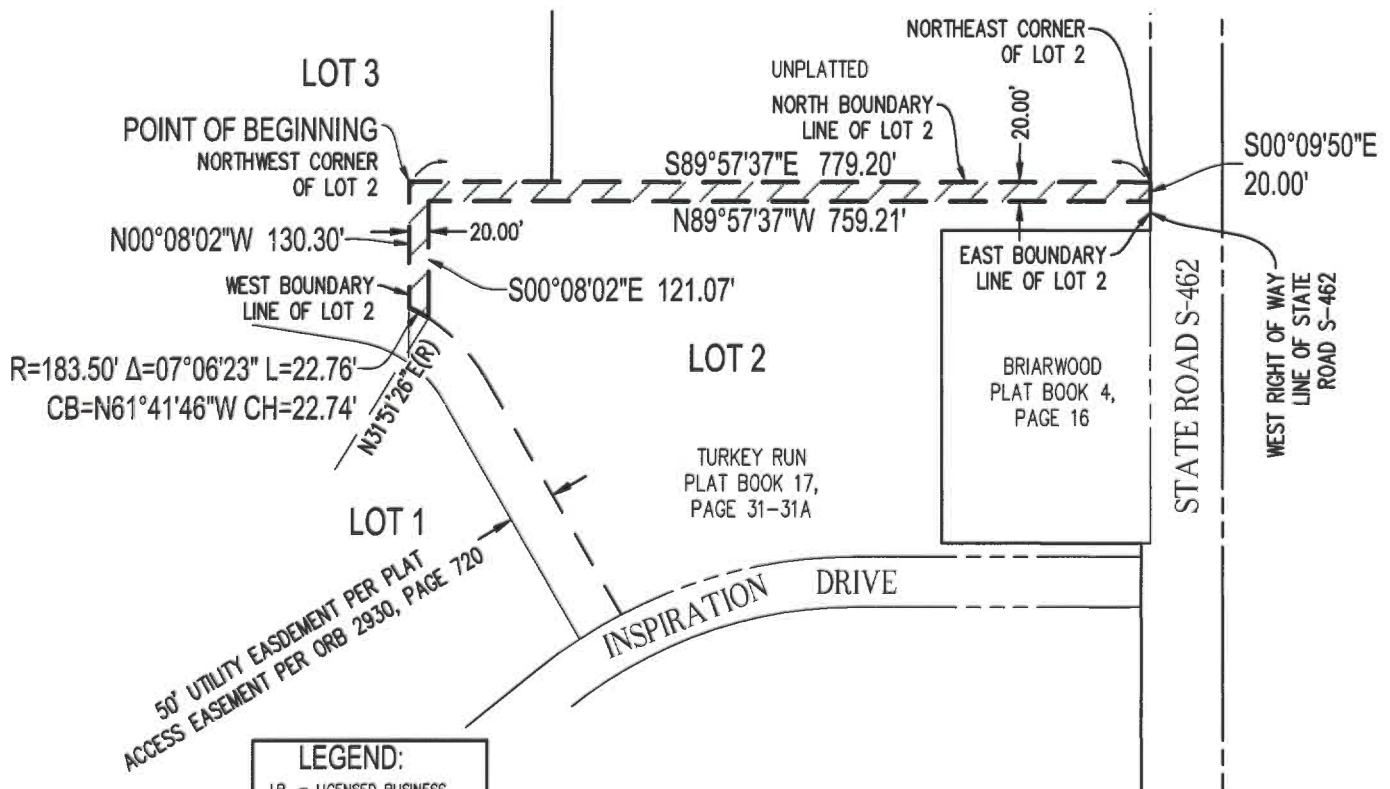
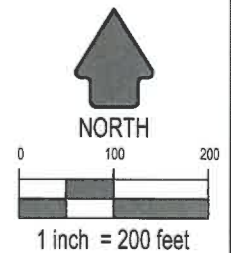
TURKEY RUN LOT 2 EASEMENT

EXHIBIT " "
SHEET 1 OF 1

LEGAL DESCRIPTION

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8/13/24
DATE

KAYE M. JAMESON - PROFESSIONAL SURVEYOR & MAPPER
FLORIDA REGISTRATION NO. 5912

JOB SP2024.03382



CITY COMMISSION OF THE CITY OF WILDWOOD

EXECUTIVE SUMMARY

SUBJECT: Approval to Award RFP #2025-07 Benefits Consulting & Broker Services

REQUESTED ACTION: Staff recommends approval.

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

The Human Resources Department initiated a Request for Proposals (RFP) for assistance with planning, designing, negotiating, and analyzing the best coverage and cost for selective employee benefit programs.

On February 4, 2025, RFP #2025-07 for Benefits Consulting and Broker Services was posted to request proposals from qualified providers. On March 25, 2025, the City publicly opened the seven (7) proposals received. The proposals were evaluated by the selection committee consisting of Melissa Tuck, Human Resources and Risk Director; Marc Correnti, Human Resources Generalist; Cassandra Smith, Assistant City Manager/CFO; Alice Borrack, Payroll Specialist; and Thomas Rigwood, Assistant Director of Public Works.

Presentations by the top three (3) ranking firms were held on May 19, 2025. The presentations addressed questions from the committee, provided scope of service clarifications, and introduced key personnel associated with the City's request. After the presentations, Gehring Group (RSC Insurance Brokerage, Inc.) remained the highest-ranking firm. The committee recommended that the Commission approve the award to Gehring Group.

However, before the Commission considered the award, Acrisure timely submitted a formal written protest to appeal the City's intent to award the RFP to Gehring Group. The City Manager then reviewed all pertinent documentation, held a protest meeting, and heard testimony from Acrisure and Gehring Group representatives. After consideration, the City Manager issued a finding that upheld the selection committee's ranking.

Acrisure did not file an additional appeal to the City Commission.



July 25, 2025

Doug Childers
Vice President of Growth – South Division
Acrisure
1317 Citizens Blvd.
Leesburg, Florida 34748

RE: RFP 2025-07 – Benefits Consulting and Broker Services – Award Appeal

Dear Mr. Childers,

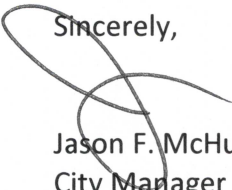
Please accept this letter as official notification of my intention to uphold the award recommendation for the above-referenced project in favor of Gehring Group. This determination has been made according to the Appeal Procedures of the City's Purchasing Policy.

After thoroughly reviewing the Request for Proposal, the Selection Committee's scoring methodology, and both the documentation and testimony provided by Acrisure representatives, I find no substantial evidence of error in the scoring process that would justify overturning the Selection Committee's recommendation in favor of the Gehring Group.

Pursuant to the Appeals Procedures within the City's Purchasing Policy, bidders adversely affected by the Office of the City Manager's decision may appeal this decision to the City Commission by filing a written appeal with the City Clerk no later than 5:00 p.m. on July 30, 2025.

Please let me know if you have any questions or concerns regarding this determination or the process moving forward.

Sincerely,


Jason F. McHugh, AICP, CPM
City Manager

CC: Jessica Barnes, City Clerk
Robert Schoepe, Procurement Program Manager
Cindy Thompson, VP of Operations - Gehring Group
Wildwood City Commission



Acrisure South
1317 Citizens Blvd.
Leesburg, FL 34748

June 9, 2025

City of Wildwood
Jason McHugh | City Manager
100 N. Main Street
Wildwood, FL 34785

RE: **RFP 2025-07 – Benefits Consulting & Broker Services – Award Appeal**

Dear Jason,

We are challenging the award of the aforementioned Request for Proposal on the grounds of improper evaluation. We are specifically challenging the scoring assigned to the criteria of Method of Approach and Cost Competitiveness as outlined on page 12 of the RFP document issued by the City. After reviewing the scoring, there appears to be some scoring inconsistencies in these categories in comparison to the evaluation criteria.

Method of Approach – on page 12 of the RFP, the scoring assigned to Method of Approach weights the following criteria: *Evidence of the ability to provide service in a prompt, thorough and professional manner. Availability of and accessibility of the selected service provider including the location of the office that will service the account.*

In addition to the RFP documentation, the finalist invitation also expressed the firm's local presence as a criterion and "topic of interest."

The scoring assigned to the various respondents varied widely on this measure by each evaluator. Our agency is the only respondent that has a local presence with an office in Wildwood and employees residing in Wildwood including the lead consultant and executive leadership.

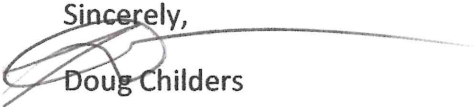
Cost Competitiveness – the awarded respondent scored higher in cost competitiveness by two evaluators on the analysis portion and two evaluators on the presentation portion. However, our proposal indicated we were 2% lower on medical commission resulting in a total commission spend of \$30,000 less than Gehring. (Calculations attached). In addition, our proposal indicated we cover COBRA costs and ACA filing fees. Gehring's proposal did not list that as a covered service further increasing the City's cost of administering benefits.

It would appear that the committee may not have been provided with the complete data by the procurement office in order to fully evaluate this component of the score.

As the incumbent broker for the City of Wildwood, we have provided services to your entity and employees for over ten years. With an office located in the City and employees who live and work in the City, we are directly impacted by this decision. Furthermore, awarding a bid to a company that is not local when you have a qualified organization right in your own community goes against the established mission of The City to “maximize opportunities to promote the social and economic well-being of its residents and businesses”. This is especially true when the local incumbent agent’s bid was 25% lower than the non-local awarded respondent.

We respectfully request that you review the scoring inconsistencies mentioned to determine if proper scoring in these two measures would have provided us with the winning score and allowed us to continue to service The City of Wildwood.

Sincerely,



Doug Childers

Vice President of Growth – South Division

cc: Acrisure South
1317 Citizens Blvd.
Leesburg, FL 34785

Methodology

	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Total	
Acrisure	22	25	30	23	21	121	
Gehring	20	25	24	26	25	120	Team is in Palm Beach Gardens
Higginbotham	10	25	24	28	18	105	Lead consultant has been in insurance for one year. No mention of servicing location.
HUB	22	20	28	12	25	107	
Gelin	24	25	18	24	24	115	Listed a shared workspace address as their "local address" in Orlando

Cost

	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5		
Acrisure	10	10	10	10	7	8	45
Gehring	10	10	8	8	8	8	44
Higginbotham	4	10	4	8	4	4	30
HUB	10	10	8	8	8	8	44
Gelin	10	10	9	8	10	10	47

Notes: These notes highlight inconsistencies in certain evaluator scoring based on the criteria noted for the score in the RFP document.

Presentation Scores

Cost

	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Acrisure	5	4	5	4
Gehring	5	5	5	5

25% more in total commission with medical at 6%

Client Name City of Wildwood
Renewal Date: 10/1/2025
Broker: Acrisure

	Annual	% or PEPM	Annual	# enrolled
Medical (%)	\$1,783,062.00	4%	\$71,322.48	
Dental	\$74,057.00	10%	\$7,405.70	
Vision	\$17,720.00	10%	\$1,772.00	
CAA subtotal:	\$1,874,839.00		\$80,500.18	
Basic Life	\$18,274.00	15%	\$2,741.10	
Vol Life/AD&D	\$23,437.00	15%	\$3,515.55	
LTD	\$36,168.00	15%	\$5,425.20	
STD	\$37,865.28	15%	\$5,679.79	
Total:	\$1,990,583.28		\$97,861.82	

Client Name City of Wildwood
Renewal Date: 10/1/2025
Broker Gehring Group

	Annual	% or PEPM	Annual	# enrolled
Medical (%)	\$1,783,062.00	6%	\$106,983.72	
Dental	\$74,057.00	8%	\$5,924.56	
Vision	\$17,720.00	10%	\$1,772.00	
CAA subtotal:	\$1,874,839.00		\$114,680.28	
Basic Life	\$18,274.00	10%	\$1,827.40	
Vol Life/AD&D	\$23,437.00	10%	\$2,343.70	
LTD	\$36,168.00	15%	\$5,425.20	
STD	\$37,865.28	10%	\$3,786.53	
Total:	\$1,990,583.28		\$128,063.11	

Tab D:

Cost Competitiveness

Include a description of relevant compensation structures, minimums and maximums, variation in product markets or other relevant information that demonstrates fair and competitive compensation approaches.

With Gehring Group/Risk Strategies' focus on working collaboratively with our clients and their members throughout the year, and encouraging our clients to use us as a resource when needed, we are proposing a comprehensive level of employee benefits consulting services for your employee benefits coverage under the commission structure outlined below:

Contract Year	Annual Fee
Medical	6%
Dental	8%
Group Life & AD&D	10%
Dependent Life	10%
Supplemental Life	10%
Vision	10%
Voluntary/Supplemental Offering	Carrier Standard

It is important to note that Risk Strategies does not participate in any provider relationships that would prevent us from acting independently and providing objective advice and guidance. In addition, we practice full disclosure relating to all compensation with all clients.

Under the above compensation proposal, there be will no additional charges to the City of Wildwood by Gehring Group/Risk Strategies for the following:

- Employee Navigator Online Enrollment & Administration System
- Travel costs associated with servicing the City
- Onsite attendance at annual Open Enrollment meetings
- Development of annual employee benefit guide
- Access to *Mineral* online H.R. research tool

Gehring Group/Risk Strategies remains open to discussion regarding the above compensation proposal as well as alternative compensation options under consideration.



Price Proposal

**All Services
Awarded to HPS**
Medical Consulting
Voluntary Benefit Consulting
Retirement Plan Services

Medical Consulting Services	
Medical Consulting Fee	No Fee to City of Wildwood. HPS will receive standard industry commission on the medical benefit.
Voluntary Benefits Consulting Services	
Voluntary Benefits Consulting Fee	No Fee to City of Wildwood. HPS to receive standard industry commission on all voluntary and employer-paid benefits.
Voluntary Retirement Plans Consulting Services	
Voluntary Retirement Plans Fee 457(b)	No Fee to City of Wildwood
Onsite Educational Investment and Retirement Meetings 457(b)	No Fee to City of Wildwood
Onsite Enrollment Support 457(b)	No Fee to City of Wildwood
Voluntary Retirement Plans 3121 FICA Alternative	No Fee to City of Wildwood
Marketing Strategies	
Postcard Design	No Fee to City of Wildwood
Poster Design	No Fee to City of Wildwood
Open Enrollment Announcements	No Fee to City of Wildwood
Customized Open Enrollment Guide	No Fee to City of Wildwood
Email Drip Campaigns	No Fee to City of Wildwood
Payroll Inserts & Flyers	No Fee to City of Wildwood
Benefits Website Design & Build	No Fee to City of Wildwood
Benefits Guide Printing	No Fee to City of Wildwood
Postcards Printed & Mailed	No Fee to City of Wildwood



Price Proposal

All Services
Awarded to HPS
Medical Consulting
Voluntary Benefit Consulting
Retirement Plan Services

Ongoing Service & Communication	
Higg Public Sector CareLine	No Fee to City of Wildwood
Benefits Newsletters	No Fee to City of Wildwood
Branded Wellness Communications	No Fee to City of Wildwood
Communication Pieces	No Fee to City of Wildwood
Targeted Educational Webinars	No Fee to City of Wildwood
Leave of Absence Support Materials	No Fee to City of Wildwood
Interactive Tools & Calculators	No Fee to City of Wildwood
Health Literacy Initiatives	No Fee to City of Wildwood
Trend Analysis & Benchmarking	No Fee to City of Wildwood
Open Enrollment Support	
Onsite Group Educational Meetings	No Fee to City of Wildwood
Onsite Enrollment Support	No Fee to City of Wildwood
Call Center	No Fee to City of Wildwood
Compliance Resources	
Compliance Dashboard	No Fee to City of Wildwood
Compliance Newsletters	No Fee to City of Wildwood



Price Proposal

**All Services
Awarded to HPS**
Medical Consulting
Voluntary Benefit Consulting
Retirement Plan Services

Optional Services Offered to City of Wildwood

Flexible Spending Administration (FSA) (Administered In-House at HPS)	
Flexible Spending Administration with Flex Card	No Fee to City of Wildwood
COBRA Administration (Administered In-House at HPS)	
COBRA Administration Medical/Dental/Vision/Flex	No Fee to City of Wildwood
Health Savings Account Administration (HSA)	
HSA Administration with Debit Card	No Fee to City of Wildwood or Employee
Online Enrollment & Benefits Administration System	
THEbenefitsHUB Enrollment/Benefits Admin Platform	No Fee to City of Wildwood
Benefits App	No Fee to City of Wildwood
Full Reporting	No Fee to City of Wildwood
Auto Demographic Import	No Fee to City of Wildwood
Standard Payroll File	No Fee to City of Wildwood
EDI File Feeds to Carriers	No Fee to City of Wildwood
Post-Enrollment Audit Report	No Fee to City of Wildwood
Billing & Reconciliation Services (Only applicable if Wildwood utilizes THEbenefitsHUB online enrollment & benefits administration system)	
Reconcile Medical & Voluntary Benefits	No Fee to City of Wildwood
Common Remit to Carriers	No Fee to City of Wildwood
Affordable Care Act Administration (ACA)	
ACA Reporting	\$1.05 PEPM Fee
FMLA Tracking Software	
Paperless process, tracking, documents upload with multiple calendars	Base Price \$3,000 + \$1.00 PEPM

Tab D. Cost Competitiveness

1. Include a description of relevant compensation structures, minimums and maximums, variations in product markets or other relevant information that demonstrates fair and competitive compensation approaches.

HUB will review all compensation with the City of Wildwood annually during our stewardship meeting. It is our desire that the City perceives that HUB is providing extraordinary value for the compensation you pay, and we welcome the discussion of fees and services.

HUB Public Risks goal from a pricing perspective is negotiable in the effort to reach satisfaction from both the City of Wildwood and our interest. HUB will be completely transparent in all forms of pricing/compensation and will address this issue annually in our stewardship meeting with City personnel. We encourage communications and common goals achievement in setting compensation for the account.

There are several methods or approaches to compensation for broker services, but the two main methods are commission and fee based. For this engagement, we have chosen to be compensated by commission. Standard commission percentages will be paid by the group medical and ancillary coverages for all services presented in this proposal.

Group Medical 3-5%, Dental 10%, Basic Life 15%, Voluntary Life 15%, Short-Term Disability 15%, Long-Term Disability 15%, Accident 20%, Critical Illness 20%, Whole Life 20%, Hospital Indemnity 20%, Vision 10%.

Tab D. COST COMPETITIVENESS:

Include a description of relevant compensation structures, minimums and maximums, variations in product markets or other relevant information that demonstrates fair and competitive compensation approaches.

The Gelin Benefits Group is committed to providing transparent, fair, and competitive compensation arrangements that align with industry standards while delivering exceptional value to the City of Wildwood. As specified in the RFP, we acknowledge that compensation will be provided exclusively through carrier commissions, with no additional fees charged to the City.

Standard Commission Structure

Our standard commission arrangements for municipalities of Wildwood's size typically follow these parameters:

Medical Insurance

Standard commission range: 3-5% of premium

Dental Insurance

Standard commission range: 7-10% of premium

Vision Insurance

Standard commission range: 10-12% of premium

Life and Disability Insurance

Standard commission range: 10-15% of premium

Voluntary Benefits

Variable structure based on product type and enrollment approach

Transparency Commitment

We are committed to full transparency regarding our compensation:

- Annual disclosure statements will be provided detailing all commissions received from each carrier
- Quarterly updates on year-to-date compensation can be provided upon request
- Any contingent compensation arrangements will be fully disclosed

Performance-Based Components

We're willing to link a portion of our compensation to measurable performance metrics such as:

- Response time compliance
- Employee satisfaction scores
- Implementation milestone achievement
- Cost containment results

**City of Wildwood
Compensation | Commission Levels**

Line of Coverage	Commission Level
Medical	4.0%
Dental	10%
Vision	10%
Life and AD&D	15%
Short Term Disability	10%
Long Term Disability	10%



1. Include a description of relevant compensation structures, minimums and maximums, variations in product markets or relevant information that demonstrates fair and competitive compensation approaches.

Our goal is to build a long-term partnership with you based on providing value and transparency. We feel the solutions we have outlined in our response will yield the best possible outcome from a cost and benefit standpoint. We have also included several value-added services such as our health strategy team, preferred data analytics platform, compliance solutions group, and actuarial resources at no additional cost. We will apply the full force of our scale and underwriting expertise to ensure the vendors we recommend to your group are providing their best possible terms and fees.

The most common compensation for broker services is paid through commissions. Industry standard commissions are 5% on medical, 10% on dental and vision and 15% on life and disability. We would negotiate a reduction in medical carrier commission to 4% at renewal.

Additional services included in our commission include COBRA Administration fees, Benchmarking Services, TruHu Communication tool, Mineral HR, HR Edge, ACA Filing Support and Fees Associated with Filing, and Employee Navigator portal including carrier feeds.

The RFP requested compensation in the form of commission, but other arrangements would be available if requested including a flat fee model or a Per Employee Per Month Model.

Analysis RFP 2025-07 Benefits Consulting & Broker Services

Proposal Ranking: RFP2025-07

Offerors	Evaluation Criteria					Criteria Per		Points out of 100	Ranking
	Capability, Qualification, Experience (40)	Method of Approach (30)	Proven Ability (20)	Subtotal	Cost Competitiveness (10)	Offeror Subtotal	Score		
Acrisure Southeast Partners	31.8	24.20	16.80	72.8	9.00	81.80	81.80%	Acrisure Southeast Partners	3
Evaluator 1	30.0	22.0	18.0		10				
Evaluator 2	35.0	25.0	16.0		10				
Evaluator 3	38.0	30.0	16.0		10				
Evaluator 4	28.0	23.0	18.0		7				
Evaluator 5	28.0	21.0	16.0		8				
Gallagher Benefits	21.6	16.2	12.00	49.8	5.00	54.80	54.80%	Gallagher Benefits	6
Evaluator 1	10.0	12.0	12.0		2				
Evaluator 2	30.0	18.0	18.0		10				
Evaluator 3	20.0	15.0	10.0		4				
Evaluator 4	28.0	18.0	8.0		5				
Evaluator 5	20.0	18.0	12.0		4				
Gehring	36.0	24.00	18.80	78.8	8.80	87.60	87.60%	Gehring	1
Evaluator 1	35.0	20.0	18.0		10				
Evaluator 2	35.0	25.0	18.0		10				
Evaluator 3	40.0	24.0	20.0		8				
Evaluator 4	38.0	26.0	18.0		8				
Evaluator 5	32.0	25.0	20.0		8				
Gelin Benefits	29.6	23.0	14.40	67.0	9.40	76.40	76.40%	Gelin Benefits	4
Evaluator 1	35.0	24.0	11.0		10				
Evaluator 2	30.0	25.0	15.0		10				
Evaluator 3	25.0	18.0	18.0		9				
Evaluator 4	28.0	24.0	12.0		8				
Evaluator 5	30.0	24.0	16.0		10				
Higginbotham	24.6	21.00	10.00	55.6	6.00	61.60	61.60%	Higginbotham	5
Evaluator 1	10.0	10.0	5.0		4				
Evaluator 2	25.0	25.0	15.0		10				
Evaluator 3	30.0	24.0	10.0		4				
Evaluator 4	35.0	28.0	12.0		8				
Evaluator 5	23.0	18.0	8.0		4				
HUB Public Risk	34.6	21.4	17.20	73.2	8.80	82.00	82.00%	HUB Public Risk	2
Evaluator 1	38.0	22.0	16.0		10				
Evaluator 2	30.0	20.0	18.0		10				
Evaluator 3	35.0	28.0	18.0		8				
Evaluator 4	38.0	12.0	16.0		8				
Evaluator 5	32.0	25.0	18.0		8				
Southern Employer Benefits	14.2	13.40	10.20	37.8	4.40	42.20	42.20%	Southern Employer Benefits	7
Evaluator 1	15.0	10.0	8.0		2				
Evaluator 2	15.0	15.0	15.0		10				
Evaluator 3	15.0	12.0	12.0		2				
Evaluator 4	8.0	12.0	4.0		4				
Evaluator 5	18.0	18.0	12.0		4				

RFP2025-07 Benefits Consulting & Broker Services

Presentations Scores

Offerors	Evaluation Criteria				Presentation Score
	Capability, Qualifications and Experience (20)	Method of Approach (15)	Proven Ability (10)	Cost Competitiveness (5)	Subtotal
Acrisure Southeast Partners	19.3	13.5	9.8	4.5	42.50
Evaluator 1	20.0	15.00	10.00	5.00	
Evaluator 2	18.0	13.00	9.00	4.00	
Evaluator 3	19.0	13.00	10.00	5.00	
Evaluator 4	20.0	13.00	10.00	4.00	
Gehring Benefits	17.5	13.5	9.0	5.0	40.00
Evaluator 1	18.0	15.00	10.00	5.00	
Evaluator 2	13.0	12.00	8.00	5.00	
Evaluator 3	19.0	15.00	10.00	5.00	
Evaluator 4	20.0	12.00	8.00	5.00	
HUB Public Risk	14.8	10.5	7.5	2.8	32.75
Evaluator 1	10.0	5.00	5.00	1.00	
Evaluator 2	14.0	12.00	10.00	5.00	
Evaluator 3	15.0	11.00	7.00	3.00	
Evaluator 4	20.0	14.00	8.00	2.00	

RFP2025-07 Benefits Consulting & Broker Services Combined Scores

Summary Rankings

Offerors	Proposal Scores	Presentation Scores	Total Scores	Ranking
	Subtotal	Subtotal	150 points	
Acrisure Southeast Partners	81.80	42.50	124.30	2
Gehring Benefits	87.60	40.00	127.60	1
HUB Public Risk	82.00	32.75	114.75	3



CITY OF WILDWOOD

BENEFITS CONSULTING & BROKER SERVICES
RFP NO. 2025-07

Due Date: Tuesday, March 25, 2025 at 2:00 p.m.

Proposal Contact: Cindy Thompson, V.P. of Operations
Tel: (800) 244-3696 or (561) 626-6797
Email: cindy.thompson@gehringgroup.com

Supporting the Public Sector our
communities rely on.



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Tab H:	Submittal Documents Required
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• Proposal Form (Attachment H2)	
• Statement of Terms & Conditions (Attachment H3)	
• Hold Harmless Agreement (Attachment H4)	
• Drug Free Workplace Certificate (Attachment H5)	
• Sworn Statement on Public Entity Crimes (Attachment H6)	
• Conflict of Interest Disclosure Form (Attachment H7)	
• Immigration Affidavit Certification (Attachment H8)	
• State of Florida Sunbiz Annual Report	
• Sample Certificates of Insurance	
• Exceptions/Deviations to Sample Agreement	
Tab I:	Exhibits
Exhibit 1	Sample Employee Benefit Guide
Exhibit 2	Sample Employee Communications
Exhibit 3	Sample Reports & Work Product
Exhibit 4	Sample Client Webinar
Exhibit 5	Sample Employee Benefit Newsletters
Exhibit 6	Client Letters of Recommendation

RFP COVER PAGE

Name of Vendor, Entity or Organization: RSC Insurance Brokerage, Inc.
Federal Employer Identification Number (FEIN): 16-1689464 State of Florida License Number (If Applicable): L044634 Name of Contact Person: Cindy Thompson Title: Vice President-Operations E-Mail Address: cindy.thompson@gehringgroup.com
Mailing Address: 3500 Kyoto Gardens Drive, Palm Beach Gardens, FL 33410 Street Address (if different): same City, State, Zip: same Telephone: (561) 626-6797 (800) 244-3696 Fax: (561) 626-6970
Organizational Structure – Please Check One: Corporation ☒ Partnership ☐ Proprietorship ☐ Joint Venture ☐ Other ☐ If Corporation: Date of Incorporation: March 18, 2003 State of Incorporation: Delaware States Registered in as Foreign Corporation: Florida
Authorized Signature: Print Name: Kurt N. Gehring Signature:  Title: Managing Director Phone: (561) 626-6797 (800) 244-3696
<i>This document must be completed and returned with your Submittal.</i>

Tab A:

Statement of Interest

Statement of Interest to be submitted on the Vendor's letterhead.

Please refer to Gehring Group/Risk Strategies statement of interest on the following pages.

March 21, 2025

City of Wildwood
100 N. Main Street
Wildwood, FL 34785

Re: RFP No. 2025-07 – Benefits Consulting & Broker Services

Dear Evaluation Committee Member:

Gehring Group/Risk Strategies is pleased to provide this proposal in response to the City of Wildwood's RFP for Benefits Consulting and Broker Services. Through our extensive experience working with governmental employers over the past three decades serving as Benefits and Risk Management Consultant/Broker, we are confident that our firm can offer innovative solutions, efficiencies, value-added services, in-depth industry and employee benefits program knowledge, a vast depth of support and experience, along with an unparalleled level of service to your Leadership, Staff and Members. We believe that effective insurance management goes beyond the mere placement and sale of products—it is about delivering comprehensive advisory services. By fostering a culture of collaboration and teamwork, we deliver added value through tailored resources, designing and executing innovative and forward-thinking solutions.

Our Public Sector Specialty division in Palm Beach Gardens, Florida location will service the City of Wildwood and employs local team members averaging 12+ years and leadership personnel averaging 18 years of industry experience. Upon becoming a division of RSC Insurance Brokerage, Inc. in 2022, Gehring Group/Risk Strategies has even more to offer within the product and services area of benefits. As one of the largest privately held insurance advisors, we serve over 160 public entity clients in the state including municipalities, counties, housing authorities, special taxing districts, utility companies and other public entities. Furthermore, our national presence represents over 5,000 valued team members, including in-house legal, actuarial, and experts in various coverage specialties, positioning us as industry leaders. We rank in the top three nationally across numerous specialties, providing a comprehensive suite of employee benefits and property and casualty services and have successfully introduced and implemented cutting-edge concepts, including Consumer Directed Health Plans, customized Stop Loss programs, Onsite Clinics, and progressive Wellness and Mental Health initiatives. By actively listening, we craft customized strategies that deliver optimal solutions and align the right partners to meet each client's objectives.

With our extensive experience serving large public sector clients, we have cultivated a sophisticated approach that drives innovation, broadens our national reach, and attracts top talent; and our partnerships and market presence have earned us top-tier recognition from all Florida insurance carriers. Risk Strategies has more than 1,000 municipal clients nationwide, including our significant presence in Florida. Our commitment to a "how can we help you" mindset ensures that we remain a valuable year-round resource for our clients' benefit needs. We prioritize transparency and independence, recognizing that each client has unique goals and challenges.

UNDERSTANDING OF THE SERVICES REQUESTED

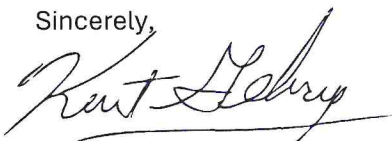
Gehring Group/Risk Strategies has thoroughly reviewed and fully understands the requirements, scope of services, and specifications outlined in this RFP and are committed to delivering the requested services with excellence. We recognize the City's objective to maintain a competitive and cost-effective employee group benefit program and are prepared to leverage our industry experience and knowledge to achieve this goal. Our services will encompass, but are not limited to: servicing all lines of employee benefits insurance coverages, benefits analysis and research, procurement of insurance, vendor and renewal negotiations, open enrollment coordination and assistance, wellness program consulting, developing communication strategies, monitoring regulatory and compliance issues, providing real-time benchmark data, continuous examination and review of claims and benefit data, and overall benefits administration support. Gehring Group/Risk Strategies also assists our clients in complying with State and Federal legislation including but not limited to Sunshine Laws, Statute 112.0801, and provide guidance regarding ACA requirements specific to their size of group and funding arrangement.

Additional services include benefits communication and professional graphics services, open enrollment assistance, employee advocacy services, assistance with claims and billing issues, and legislative compliance regarding COBRA, HIPAA, ACA, GINA, and more. Our in-house professional graphics department is available to design and produce various employee communication pieces and educational flyers in addition to our annual Employee Benefits Guide and Wellness Program Brochures that can be customized according to your benefits options. In addition, your Gehring Group/Risk Strategies team is available on an ongoing basis for onsite meetings with Staff, health and wellness committees, union groups, decision makers, or the general employee population.

We provide innovative and sophisticated solutions to complex problems and utilize technology and administrative capabilities to assist our clients in gaining efficiencies and developing both short term and long-range strategies to conform to our clients' overall needs and goals while adhering to any commitments made within Union Agreements. We remain in contact with our clients continuously throughout the plan year, preparing renewal/budget projections and monitoring available claims experience as well as assisting employees with claims issues and enrollments. Our proactive and strategic approach as detailed in this proposal, coupled with our industry knowledge, familiarity with applicable legislation, awareness of new and innovative products and programs, market relationships and enthusiasm, make us the consultant of choice for public entities. We are a collaborating partner, helping each client accomplish their desired benefits program goals by developing long term strategies and working diligently to produce positive results through analytics, innovation, and technology. In addition, all service team members have achieved their Florida insurance license and can legally advise employees regarding their benefit options.

With authority to bind the agency, please allow me to express our confidence in our ability to provide the City with additional value and exceptional services relating to its Employee Benefits programs. We thank the members of the selection committee for their consideration of our comprehensive response and stand ready to provide any additional clarification upon review of this proposal.

Sincerely,



Kurt N. Gehring

Managing Director & National Practice Leader – Public Entities

Tab B:

Company Information

Provide an overview of your company, including a brief description of your company's history, growth, ownership, philosophy/culture, approximate number of employees and financial growth.

After three decades of dedicated service to the Florida insurance market, Gehring Group has proudly joined RSC Insurance Brokerage, Inc. (Risk Strategies Company), a distinguished privately held corporation, as of January 1, 2022. Now operating under our new name, Gehring Group/Risk Strategies is excited to submit this proposal in response to Wildwood's RFP for Benefits Broker Services. Our deep-rooted understanding of your benefits requirements, cultivated through our three decades of serving as the Benefits Consultant/Broker for over 160 Florida public entities, assures that our firm is well-positioned to not only meet, but exceed expectations by delivering exceptional service standards, value-added services, and efficiencies. RSC Insurance Brokerage, Inc. d/b/a Risk Strategies Company is a Delaware corporation, incorporated in 2003, authorized to do business in the state of Florida as evidenced by the Florida Sunbiz.org documentation located in **Tab H: Submittal Documents Required**.

As outlined in **Tab A**, our public sector division includes 80 employees and our national presence represents over 5,000 valued team members, including in-house legal, actuarial, and experts in various coverage specialties, positioning us as industry leaders. In addition, our three decades of dedicated service and experience in the Florida public sector insurance market has uniquely positioned us as trusted risk and benefits consultants/brokers. We understand your organization's distinct needs and are confident in our ability to continue to provide the required services and meet time and budget requirements. As the **Public Sector Specialty Division** of Risk Strategies Company, we remain committed to delivering efficiencies, value-added services, and in-depth public sector knowledge that goes beyond mere satisfaction. Our goal is to exceed expectations. At Gehring Group/Risk Strategies, we don't just meet your needs; we anticipate them.

Gehring Group/Risk Strategies clients benefit from our:

- **98% Client Retention Rate:** We have the experience necessary to serve the needs of the public sector.
- **Comprehensive Scope of Services:** Gehring Group/Risk Strategies offers an all-inclusive and comprehensive range of services tailored to your specific requirements.
- **Cost Management:** Our proactive approach ensures cost management year over year, allowing you to focus on your core mission.
- **Educational Opportunities:** We empower our clients with educational resources, legislative update seminars/webinars, and newsletters to remain in compliance and make informed decisions.
- **Dedicated Team:** Our team boasts a team of over 80 full-time staff members, complemented by remote employees in Tampa, Sarasota, Bradenton, Orlando, Parrish, Jacksonville, Yulee, and Parkland, Florida.
- **Top-tier Carrier Recognition:** Our esteemed reputation and prominent standing within the Florida insurance market afford us top-tier recognition and significant leverage with all major

carriers. We are also one of the few brokers with the ability to solicit proposals directly from the Florida League of Cities on behalf of our clients.

At Gehring Group/Risk Strategies, we don't just serve our clients—we partner with them to deliver strategic solutions that make a difference. We are committed to being your trusted advisor, ensuring you receive the highest level of experience, service, and market leverage to meet your evolving needs.

As part of the RSC family, Gehring Group maintains its unwavering focus on the public sector. Our extensive experience serving clients similar in scope and size to the City of Wildwood has allowed us to successfully implement cutting-edge concepts including Consumer Directed Health Plans, Creative Stop Loss Programs, Direct Network Contracting, Onsite Clinics, and Innovative Wellness Programs, including mental health initiatives. Beyond our expert-level benefits consulting services, we also provide value-added offerings that set us apart including:

- 1. Benefits Marketing Services & Renewal Negotiations:** Collaborate with Staff to market lines of coverage, review funding options and alternatives, negotiate renewals, and make recommendations.
- 2. Legislative Updates & Planning:** We keep you informed and prepared for regulatory changes.
- 3. Employee Advocacy Services:** We advocate for your employees regarding resolution of claims issues and overall well-being.
- 4. Actuarial Services & Data Analytics:** Data-driven insights guide strategic decisions.
- 5. Custom Graphics & Communications:** Engage and educate your workforce effectively.
- 6. Wellness Program Consulting:** Foster a healthy, thriving workplace with effective wellness education and initiatives including mental health.
- 7. Employee Health Center (Clinic) Consulting:** Optimize healthcare access and delivery at the local level.
- 8. Human Resources & Compliance Resources:** Navigate compliance and legislation confidently.
- 9. Educational & Networking Opportunities:** Continuous learning for lasting success via our annual summit, various workshops, trainings, and more. Some of these include:
 - *Benefits Administration Workshop*
 - *Human Resources Leadership Forum*
 - *First Responder Mental Health Workshop*
 - *Firefighter Cancer Bill Workshop*
 - *Annual Two-Day Public Sector Summit*
 - *The ABCDEs of Medicare*
 - *True Colors Training & Development*
 - *Mental Health Onsite First Aide Training*

Exceeding Expectations

At our core, we are dedicated to recruiting top-tier professionals and embracing cutting-edge industry practices. Our philosophy not only remaining involved with our clients on a year-round basis, but also centers around delivering a comprehensive suite of superior brokerage and employee benefits consulting services to each and every client. Here is how we stand out:

- 1. Innovative Approach:** We do not settle for the status quo. Instead, we take an innovative, proactive stance to continually elevate our performance beyond industry norms.

2. **Strategic Partnership:** As your collaborative partner, we work closely with you to achieve your benefits program goals. Our focus is on long-term strategies that yield positive results.
3. **Data-Driven Insights:** Leveraging analytics, we provide actionable insights that drive informed decisions. Our commitment to innovation and technology ensures we stay ahead of the curve.
4. **Licensed Professionals:** All Gehring Group/Risk Strategies' service team members hold Florida insurance licenses, enabling them to legally guide employees through their benefit options.

We take an innovative, proactive approach to continuously enhance the quality of our level of performance beyond industry standards. We are a collaborating partner, helping each client accomplish their desired benefits program goals by developing long term strategies and working diligently to produce positive results.

Experience with Employee, Union/Labor Groups, and Departmental Committees

As your trusted insurance professionals, we recognize the critical importance of establishing credibility and fostering robust communication channels. Our commitment extends to key stakeholders, including the Risk Management, Human Resources, Finance, and Administrative Departments, as well as other overseeing committees and unions. Here is how we actively contribute:

1. **Engaged Participation:** Members of our team play integral roles in our clients' employee benefits and wellness committees. Whether as advisors or facilitators, we actively contribute to informed decision-making.
2. **Impartial Analysis:** Our goal is to ensure an impartial and thorough analysis of all proposed options. By collaborating closely with relevant parties, we create a holistic view that considers diverse perspectives.
3. **Smooth Transitions:** When changes are on the horizon, our collective participation serves to make any potential transition seamless. We navigate complexities with care and precision.
4. **Effective Communication:** Through these collaborative meetings, we ensure that changes and recommendations are communicated back to the employee base in a positive and effective manner. Transparency is our guiding principle.

Honors, Awards & Wellness Recognitions

Beyond our recognition as industry experts, our firm has achieved significant milestones over the past several years. These accomplishments reflect our unwavering commitment to excellence and the collective dedication of our exceptional team. Being selected as an honoree for these awards is a great tribute to each and every one of our employees, and reflection of our corporate culture; as well as a reflection of the support we receive from our clients.



Why Gehring Group/Risk Strategies?

Gehring Group/Risk Strategies is the best choice for the award for the City's Employee Healthcare and Benefits Consultant services due to our extensive experience and proven success in serving over 160 Florida public entities. With specialized knowledge of health and welfare plans, our team excels in navigating complex funding arrangements, implementing tailored programs, providing year-round service, and expertly guiding clients through the RFP, evaluation, and implementation process. Our deep understanding of public records laws, union negotiations and agreements, and the ever-evolving government regulations ensures seamless compliance and adherence to all benefit commitments.

Moreover, our proactive approach includes continuous evaluation of cost-saving opportunities and emerging industry trends, enabling us to provide innovative solutions that align with our clients' goals. We pride ourselves on delivering comprehensive services and timely, clear communication, fostering long-term relationships built on trust and mutual success. By leveraging our top-tier carrier recognition, vast market relationships and experience, we help clients manage benefits effectively while maintaining budget efficiency, making us a valuable partner in achieving strategic objectives.

1. What is your experience in the municipality and government sectors?

Having served over 160 public sector entities in Florida, Gehring Group/Risk Strategies has significant experience in servicing all lines of employee benefits coverage for all types of public sector entities. Our team has a comprehensive level of experience in conducting all phases of the procurement process, analysis, and recommendation process for all lines of employee benefits coverage, whether fully insured or self-insured. Our involvement will be comprehensive as we compile the RFP data for submission to the insurance market and work with the procurement division to maintain integrity with the bid process, and we are confident that acquisition of various competitive options will be accomplished. We are also very experienced in giving recommendation presentations to employee committees, union groups, City/Town Councils and Commissions, and various boards.

Our staff has extensive experience with evaluating, implementing, and servicing all types of programs that include Health Savings Accounts (HSA), Health Reimbursement Accounts (HRA), Consumer Driven Health Plans (CDHP), Employee Health Centers and Cafeteria Plans. Through our knowledge and experience, Gehring Group/Risk Strategies aids its clients in determining which plans represent viable options in order to assist management in making informed decisions regarding new concepts and ascertaining benefit programs that are in the best interest of their organization and membership. We work with the City to ensure that all benefit obligations have been considered throughout the RFP, evaluation, and implementation process, and that the resulting contracts conform with the City's obligations under any union agreements.

Gehring Group/Risk Strategies is well respected as a forward-thinking consultant. Not only were we one of the first brokers to implement HRAs and HSAs at a public sector entity; we have substantial onsite clinic experience, independently advising on, and implementing various onsite/near-site health center models. We have also assisted numerous public sector clients in evaluating various benefits technology tools such as online open enrollment and benefits eligibility and administration systems.

We have supported our clients in our role as advisor in the face of health care reform and the ever-changing benefits related legislation issued in recent years. During this time of legislative change, Gehring Group/Risk Strategies has taken on the role of becoming an educational resource for our clients by consistently hosting informative seminars and webinars on relevant topics.

The following include a list of our Florida public entity clients as further evidence of our focus on and experience with servicing public entities:

PUBLIC ENTITY CLIENTS	
Atlantis, City of	Marco Island, City of
Boca Raton, City of	Margate, City of
Boca Raton Housing Authority	Martin County BOCC
Boynton Beach, City of	Martin County School District
Brooksville, City of	Martin County Sheriff's Office
Broward College	Monroe County BOCC
Cape Coral, City of	Naples, City of
Career Source Palm Beach County	Nathan Benderson Park Conservancy
Central Florida Expressway Authority (LYNX)	North Palm Beach, Village of
Charlotte County BOCC	North Port, City of
Children's Services Council of PB County	North River Fire District
Citrus County BOCC	Oakland Park, City of
Clearwater, City of	Ocean Ridge, Town of
Clerk & Comptroller, Palm Beach County	Okaloosa County BOCC
Clewiston, City of	Oldsmar, City of
Cocoa, City of	Orange County Tax Collector
Cocoa Beach, City of	Orange County Sheriff's Office
Coconut Creek, City of	Osceola County Sheriff's Office
Cooper City, City of	Osceola County Tax Collector
Coral Gables, City of	Oviedo, City of
Coral Springs, City of	Pahokee, City of
Dania Beach, City of	Pahokee Housing Authority
Davie, Town of	Palm Bay, City of
Deerfield Beach, City of	Palm Beach County Sheriff's Office
Delray Beach, City of	Palm Beach, Town of
Delray Beach Housing Authority	Palm Beach Shores, Town of
Dunedin, City of	Palm Harbor Fire Rescue District
Estero Fire & Rescue District	Palm Springs, Village of
Estero, Village of	Parkland, City of
Fellsmere, City of	Parrish Fire District
Flagler County Sheriff's Office	Pasco County Clerk & Controller
Florida Keys Aqueduct Authority	Pasco County Sheriff's Office
Florida PACE Funding Agency	Pinellas County Housing Authority
Florida Sheriff's Association	Pinellas County Sheriff's Office
Fort Lauderdale, City of	Pinellas Suncoast Fire and Rescue
Fort Myers, City of	Pinellas Suncoast Transit Authority
Fort Myers Beach Fire Control District	Pompano Beach, City of
Gainesville, City of	Port of Palm Beach
Greenacres, City of	Port St. Lucie, City of

PUBLIC ENTITY CLIENTS	
Gulfstream, Town of	Rockledge, City of
Hernando County BOCC	Royal Palm Beach, Village of
Hernando County School District	Sanibel, City of
Highlands County BOCC	Sarasota County Sheriff's Office
Hillsborough County Aviation Authority	Satellite Beach, City of
Hillsborough County Sheriff's Office	Seacoast Utility Authority
Hollywood, City of	Sebastian, City of
Indian Trail Improvement District	Sebring, City of
Iona McGregor Fire District	Solid Waste Authority of PB County
Islamorada, Village of Islands	South Florida Water Management District
Juno Beach, Town of	Southern Manatee Fire Rescue District
Jupiter Island, Town of	Southwest Ranches, Town of
Key West Housing Authority	Spring Creek Charter School
Key West, City of	St. Johns River Water Management District
Keys Energy Services	St. Lucie County Sheriff's Office
Lake County BOCC	St. Lucie County Fire District HIT
Lake Park, Town of	Stuart, City of
Lake Park Community Red. Agency	Tampa Bay Water Authority
Lake Worth Beach, City of	Tarpon Springs, City of
Lake Worth Drainage District	Tax Collector, Palm Beach County
Lakeland, City of	Tax Collector, St. Lucie County
LWB Community Redevelopment Authority	Tequesta, Village of
Lee County Sheriff's Office	Government of the US Virgin Islands
Lehigh Acres Fire & Rescue Control District	Venice, City of
Loxahatchee Groves, Town of	Virgin Islands Water and Power Authority
Loxahatchee River District	Walton County BOCC
LYNX – Central Florida Reg. Transportation Auth.	Walton County Sheriff's Office
Manalapan, Town of	Wellington, Village of
Mangonia Park, Town of	West Manatee Fire Rescue District
Manatee County BOCC	West Palm Beach, City of

We also invite you to review our Letters of Recommendation included in **Exhibit 6**.

2. How long has the company been in business in Florida.

Gehring Group was incorporated in Florida in 1992 and was recently acquired by Risk Strategies in 2022 as its public entity specialty division, retaining all team members. Risk Strategies is a Delaware corporation incorporated on September 16, 2003 and has been licensed to do business in Florida since 2008.

3. How many years has the company been doing the type of work described in the Scope of Services?

The location that will be serving the needs of the City has always had a public sector focus and has been performing Employee Benefits and Risk Management consulting and brokerage services for the public sector for over 32 years. This office employs 80 team members with various specialties and knowledge to meet your needs.

4. What is the length of time your firm has provided services to governmental clients?

Focused on serving Florida public sector entities for over **32 years**, our team has accumulated a vast amount of work experience relevant to what is necessary to serve the needs of the City.

5. Does your company have a Small Business, Veteran Owned or MWBE status?

Risk Strategies does not qualify as any of the above.

6. Include a copy of the company's current state of Florida, City, or Professional Regulation License to perform business.

The following includes our Florida agency license. Individual employee licenses are also included herein.

FLORIDA DEPARTMENT of FINANCIAL SERVICES

RSC INSURANCE BROKERAGE, INC DBA RISK
STRATEGIES COMPANY

160 FEDERAL STREET FL 4
BOSTON MA 02110

Agency License Number L044634

Location Number: 166368

Issued On 03/05/2013

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 C: Team Composition & Resumes

Provide an organizational chart showing any subcontractors and the relationship to the team.

1. How is your team structured? Please include a brief biography of the service team members who would support the City of Wildwood.

Gehring Group/Risk Strategies is unwavering in its commitment to assembling a team of exceptionally skilled professionals while staying at the forefront of industry innovation. Such strategic hires include former risk management personnel with public sector experience as well as former insurance carrier personnel with significant client service and underwriting experience. Their insights enhance our ability to tailor solutions to the unique challenges faced by our clients in the municipal and related government sectors. We also have former insurance carrier underwriters, who draw from their extensive experience and advocate for our clients' best interests, ensuring optimal outcomes. In addition, the City will also benefit from our additional staff resources with varying specialties and industry specific certifications including:

- Registered Employee Benefits Consultant Certification – REBC
- Certified Employee Benefits Specialist – CEBS
- Group Benefits Associate – GBA
- Professional and Senior Professional, Human Resources – PHR and SPHR
- Certified Self-Funding Specialist – CSFS
- Certified Healthcare Reform Specialist – CHRS
- Voluntary/Worksite Benefits Certification
- NAHU Benefits Technology Certification
- USA Mental health First Aid – National Certification
- NAHU Medicare Certification



Gehring Group/Risk Strategies' service teams consist of highly qualified personnel whose resumes include years of consulting for and servicing public sector clients. The service team proposed to serve the City of Wildwood all hold their Florida Insurance license and include:

Name	Role	Florida Insurance License #	Industry Experience
Athena Erchard	Lead Benefits Consultant	A078425	26 years
Barbara Houghtaling	Co-Benefits Consultant	A123702	31 years
Christine Turnquest	Employee Benefits Analyst	W578523	13 years
Jennifer Winter	Senior Account Manager	W093148	36 years
Jessica Smith	Account Relations Manager	W850299	3 years
Amber Aronson	Client Service Specialist	W862601	3 years

At Gehring Group/Risk Strategies, we rely on our clients to be our references, and insomuch we work toward not only being excellent technicians but also excellent communicators and a valued resource for all their benefits needs. The service roles of each team member are outlined below.

Employee Benefits Service Team Roles



Senior Benefits Consultant: Athena Erchard

Your Lead Benefits Consultant is responsible for spearheading strategic and budget planning, making recommendations as necessary and providing guidance regarding plan design, new products, funding options, compliance, and legislation. Athena is available for meetings or presentations with decision makers, leadership, and employee committees as required. An expert in creative plan design, strategic planning, and all funding arrangements, Athena's experience serving public entities is unmatched.



Co-Benefits Consultant: Barbara Houghtaling, GBA, CEBS

Athena will collaborate with Barbara Houghtaling in meeting the needs of the City regarding all aspects of its employee benefits program. Barbara will be available throughout the renewal and/or RFP process as well as serving as a resource to the team regarding all employee benefits strategies and plan designs within the public sector as well as administration and service.



Employee Benefits Analyst: Christine Turnquest

The employee benefits analyst will work closely with your Benefits Consultants regarding all financial and analytical functions including compiling and issuing RFPs, evaluation of proposals and aggressive renewal negotiations. The employee benefits analyst is also responsible for monitoring claims utilization and large claims (if available), making recommendations relative to utilization patterns and providing budget and renewal projections.



Senior Account Manager: Jennifer Winter

Jennifer will serve as the City's dedicated Account Manager, assisting HR staff and employees with day-to-day benefits-related issues. She will serve as a direct contact regarding all service aspects of the benefits program including compliance issues, program implementation, open enrollment coordination and attendance, employee communications, wellness planning, and various other service roles.



Account Relations Manager: Jessica Smith

Jessica Smith supports your assigned Account Manager and serves as an in-house member of the service team responsible for coordinating implementations, enrollments, health fairs, etc. and ensuring that all day-to-day service issues are addressed. The account relations manager is also responsible for the review and editing of the annual employee benefits guide, completion of any implementation paperwork, and accuracy of employee communication materials.

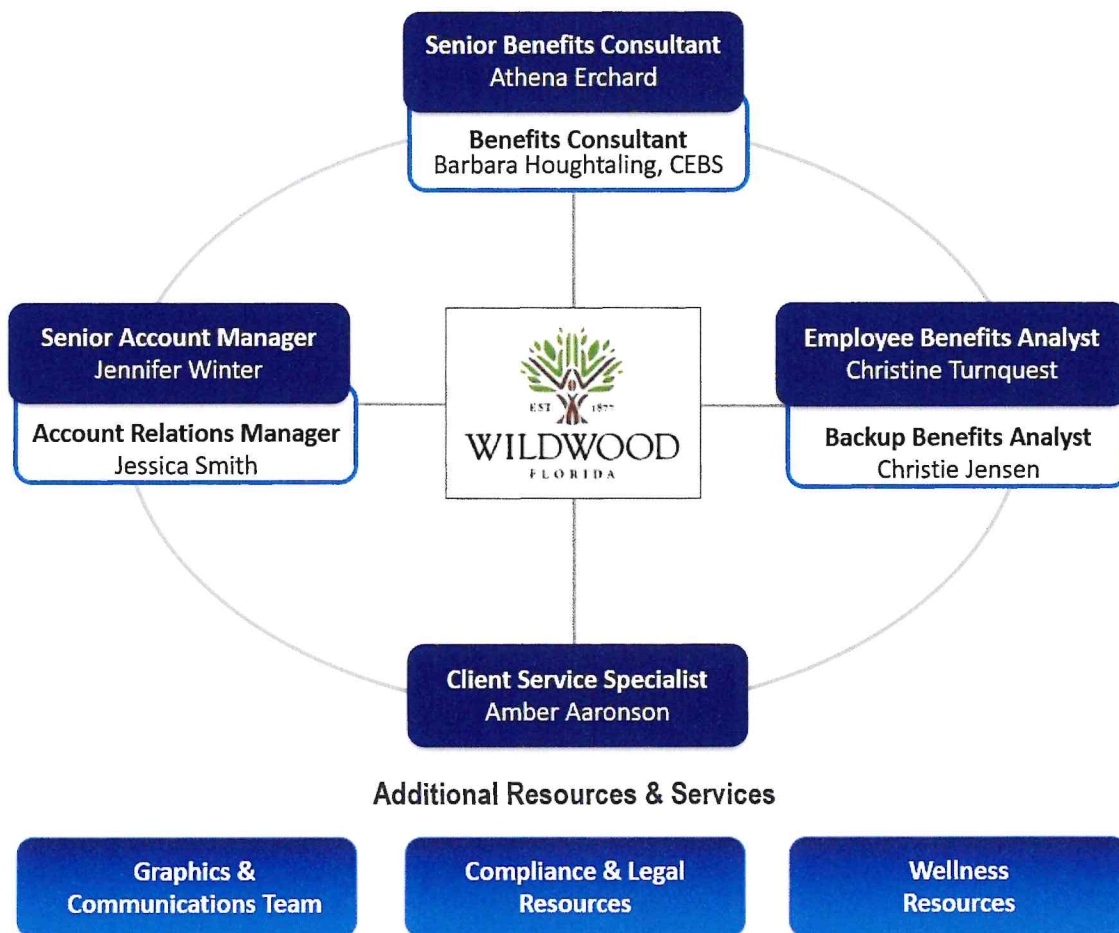


Client Service Specialist: Amber Aronson

The Client Service Specialist supports your Account Management team and serves in the role as an employee advocate, directly accessible to your employees and retirees. In this role, Amber remains in-house and available to advocate and assist the City and its employees in the resolution of unresolved claim issues. The client service specialist will work with carrier claims departments and service representative as well as providers' offices to seek resolution of claims.

Employee Benefits Service Team Organizational Structure

Risk Strategies' team structure is illustrated as follows:



SERVICE TEAM MEMBER RESUMES

Lead Benefits Consultant: Athena Erchard

Professional Licenses: Life, Health & Variable Annuity

Education: Palm Beach Atlantic University

Degree: B.A., Marketing & Psychology

Industry Tenure: 26 years

Experience & Qualifications

Athena Erchard is a seasoned employee benefits professional with 26 years of industry experience, including roles at a public sector employer and an international brokerage and consulting firm. Throughout her career, she has held multiple positions, providing her with a comprehensive understanding of the client's perspective from various vantage points. Over the past decade, Athena has focused on the public sector large group space, where she has excelled in analyzing benefit plans, funding arrangements, and insurance carrier data. She has also developed employer tools for comparing programs and managing open enrollments, benefit fairs, and wellness programs. Athena's expertise extends to bidding for all lines of coverage, including medical, stop-loss, dental, vision, life, and disability insurance.

Her extensive work history includes collaborations with all major carriers and large group employers, guiding them through healthcare reform and the evolving benefits landscape. Athena has served as a Senior Marketing Analyst, Account Executive, and Employee Benefits Division Manager, roles that have honed her ability to organize and analyze data to meet the specific needs of employer groups. Her exceptional communication skills and deep industry knowledge foster dynamic relationships with both clients and carriers. Athena's collaborative spirit ensures strong interpersonal connections between brokers, clients, and employees.

Athena has been instrumental in developing strategies that incorporate various funding arrangements tailored to client objectives, considering the insurance marketplace, budget goals, benchmarking, and legislative compliance. Her strategic thinking and proactive approach make her an invaluable asset in navigating the complexities of employee benefits. Additionally, Athena's dedication to continuous learning and staying abreast of industry trends ensures that her clients receive the most current and effective solutions. Her ability to anticipate and respond to regulatory changes further solidifies her role as a trusted advisor in the benefits consulting field.

Public Sector Experience

Athena is a member of the National Association of Health Underwriters, Florida Association of Health Underwriters and Tampa Bay Underwriters organizations. Her current clients include the Highlands County Board of County Commissioners, Tampa Bay Water Authority, City of Venice, West Manatee Fire District and City of Marco Island.

Benefits Consultant: Barbara Houghtaling, GBA, CEBS

Professional Licenses: Life, Health & Variable Annuity

Certifications: Group Benefits Associate (GBA); Certified Employee Benefits Specialist (CEBS)

Education: Northwood University

Degree: B.A., Business Management

Industry Tenure: 31 years

Experience & Qualifications

Barbara Houghtaling holds a Bachelor of Science degree in Business Administration from Northwood University (now Kaiser University) and has earned her Certified Employee Benefit Specialist (CEBS) designation. With an impressive 31-year career in the insurance industry, 10 years specifically serving public sector entities, Barbara has gained extensive experience working with both a national insurance agency and a national consulting firm service both public and private entity employers.

In her role as Employee Benefits Consultant at Risk Strategies, Barbara leverages her vast expertise to manage and enhance employee benefit programs. Her responsibilities encompass a wide range of services, including day-to-day customer service, wellness program support, open enrollment coordination, and compliance assistance on various benefit and HR-related topics.

Barbara's deep knowledge of health and welfare plans, combined with her exceptional customer relations skills, make her an invaluable asset to both Risk Strategies and the clients she serves. She provides continuous support to clients, acting as a trusted consultant and assistant to their HR and benefits teams. Throughout the year, Barbara assists with claims and billing issues, enrollment support, health and wellness fairs, new hire orientations, and a multitude of other employee benefits program services.

Public Sector Experience

Her experience includes servicing various public sector groups such as the City of Margate, Seacoast Utility Authority, Tax Collector of Palm Beach County, Village of Wellington, and Town of Palm Beach, assisting with all aspects of employee benefits administration.

Employee Benefits Analyst: Christine Turnquest

Professional Licenses: Life, Health & Variable Annuity

Education: University of Phoenix

Degree: Business Accounting

Industry Tenure: 13 years

Experience & Qualifications

Christine joined Risk Strategies in early 2022, bringing over 13 years of employee benefits and insurance industry experience to her role as employee benefits analyst. Prior to joining the Risk Strategies, Christine's work experience includes being a Benefits underwriting manager for a PEO, where she utilized methodical thought processes to analyze and assess the risk of over 200 client benefit portfolios and the master house accounts.

Most recently, Christine worked as a Senior Client Associate at a national consulting firm where she serviced over 26 clients. In this role she engaged in daily contact with, and provided service to, clients and employees regarding eligibility, claims, billing, preparation of open enrollment materials, updating

employee benefit presentations, and editing benefit booklets. Prior to becoming a Senior client Associate, Christine worked as a Benefits Analyst and partnered with producers/consultants to analyze and collaborate on strategies that would financially benefit clients and their employees. Christine also worked closely with the account management team in setting up health fairs and coordinating special projects.

In Christine's role as Employee Benefits Analyst at Gehring Group, she focuses on carrier relations and negotiations; RFP submissions, proposal evaluation, claims reporting and analysis, as well as due diligence. During the bid and negotiation process, Christine is the key liaison between the client and the insurance carrier, coordinating the market solicitation process and resulting recommendations in conjunction with other analytical team members. Christine maintains strong relationships with carrier partners who value her collaborative efforts in reaching the common goal of meeting client needs.

Experience & Qualifications

As an Employee Benefits Analyst at Gehring Group, Christine works with numerous public entities' fully insured and self-insured programs including the Osceola County Sheriff's Office, City of West Palm Beach, and Government of the United States Virgin Islands.

Senior Account Manager: Jennifer Winter

Professional Licenses: Life, Health & Variable Annuity

Education: Hillsborough Community College

Industry Tenure: 36 years

Experience & Qualifications

Jennifer joined the Gehring Group team in 2022, bringing with her a great deal of experience in multiple areas of benefits and insurance. She began her career at HealthPlan Services where she gained experience working in tele-sales, followed by 11 years processing medical and dental claims. In her claims examiner role, she became proficient not just in processing, but also worked as a claims trainer and auditor. Jennifer also worked with United HealthCare, both in operations as well as a Service Account Manager. It was in that account management role where she had her first opportunity to work with a public sector client, providing direct assistance to the City of Tampa along with their employees and families to create a personalized service experience and develop relationships that allowed for education on how their benefits would work best on an individual basis. This role led Jennifer to be very interested in onsite health clinics and the cost savings it could provide for clients and for their employees. She accepted a position as a Client Manager at CareATC, a career path which allowed her to continue her work with numerous other municipalities throughout the state of Florida.

At Risk Strategies, Jennifer plays a pivotal role in building and maintaining strong relationships with clients, and vendors. Her experience in multiple areas enables her to work very effectively and independently with complex employee benefit programs consisting of group medical, dental, life, vision, pharmacy management, disability, and worksite benefits. In this professional position, Jennifer works with clients and insurance carriers to implement insurance programs, resolve benefit administration issues, and deliver ongoing superior customer service. She understands that navigating benefits can be a stressful, complicated process for many, and takes pride in delivering recommendations and a service experience that will both simplify things and reduce stress.

Jennifer will serve as the City's Account Manager assisting staff and its employees with day-to-day benefits-related issues. She will have direct responsibility for all service aspects of City's benefits programs including implementation, open enrollments, escalated claims, wellness fairs, and compliance. In addition, Jennifer has experience with billing, carrier issues, and serving as the service resource to her clients. She will be supported by several other Gehring Group/Risk Manager staff members on the City's team, including the Benefits Consultant, Account Relations Manager, Client Service Specialist and Analyst.

Public Sector Experience

Jennifer's public entity client experience includes the City of Brooksville, Hernando County BOCC, Citrus County BOCC, Pasco County Sheriff and other clients located in Central and West Florida.

ADDITIONAL TEAM RESOURCES

Kate Grangard, CPA, Managing Director – National Public Entities Practice

Professional Licenses: Certified Public Accountant, Certified Health Care Reform Specialist

Honors: Board Member – The Lord's Place; 2016 Class of "Leadership Florida"

Education: Fordham University

Degree: BS – Business Administration, Public Accounting

Industry Tenure: 25+ years

Experience & Qualifications

Kate Grangard is a licensed Certified Public Accountant in Florida and has also held licensure in New York. She is a member of several professional organizations, including the American Institute of Certified Public Accountants and the Florida Government Finance Officers Association. She began her career in public accounting with Price Waterhouse in Manhattan, working with clients in various industries. After moving to Florida, she continued her career with Price Waterhouse in West Palm Beach. Kate's experience also includes 11 years as Vice President of Finance for a Florida-based national restaurant chain, where she developed and managed multiple departments, implemented successful internal control and risk management programs, managed the employee benefits program, and achieved substantial savings for the company.

Kate brings extensive management, finance, audit, and analytical experience to her leadership role with Risk Strategies. In her 18 years with the firm, she has overseen the financial aspects, infrastructure, and team development. Kate is also a respected speaker and educator on health care reform, including Affordable Care Act reporting, providing Continuing Education credits for various professionals. She is actively involved in her community, serving on several committees and boards, including the Health Care Reform committee of the Council of Insurance Agents & Brokers and the Executive Board of The Lord's Place. Kate's commitment to her community and the public sector clientele that Risk Strategies serves is unwavering.

Anna Maria Studley – Director of Client Development

Professional Licenses: Life, Health & Variable Annuity

Education: Suffolk Community College

Degree: Associates – Accounting and Business Administration

Industry Tenure: 40+ years

Experience & Qualifications

A 17-year veteran of serving the public sector, Anna Maria Studley is a seasoned professional with over 40 years of experience in the insurance industry, having obtained vast experience undertaking many roles in the insurance sector. Her work history includes time as a General Agent and a Consultant, experience with two national insurance carriers, owning and operating a third-party administration company, and experience as Director of Account Management with a national brokerage firm. Her knowledge encompasses providing analysis of benefit plans and claims utilization, oversight of the RFP and evaluation process, management of various funding arrangements, coordination of open enrollments and health fairs, and the handling of escalated member issues and billing reconciliation. Licensed in 26 states, she has also serviced such large employers as IBM and FPL where she managed several multi-state employee benefit programs, performed health insurance claim audits, and assisted with the completion of required Form 5500s. Her expertise in compliance issues, state and federal regulations also makes her a valuable asset to the Risk Strategies team and the clients she serves.

In addition, Anna Maria brings invaluable insight and experience from her employment experience with two national health insurance carriers. Her years with these carriers enabled her to gain special expertise regarding the inner workings of an insurance carrier and provided the opportunity for the establishment of significant industry relationships. As Director of Client Development and resource to your local Risk Strategies service team, Anna Maria's knowledge extends to all aspects of client service and technical analysis to ensure delivery of the highest level of service with the ultimate goal of achieving both client and member satisfaction. Anna Maria has also obtained her certification as a *National Council Mental Health First Aid* instructor to proactively provide solutions when addressing increasing concerns around mental health and substance use disorders. She has also achieved the National Association of Health Care Underwriters' *Medicare Certification* which meets all CMS requirements and complements each plan sponsor's plan-specific training.

Kimberly Hall – Quality Assurance & Analytics Training Manager

Professional Licenses: Life, Health & Variable Annuity

Education: Immaculata College

Degree: B.S., Mathematics/Computer Science/Physics

Industry Tenure: 30+ years

Experience & Qualifications

In her role as the Quality Assurance & Analytics Training Manager, Kim Hall will be responsible for overseeing the team performing the financial and analytical aspects relating to the account. She will also be an additional contact regarding all financial aspects of its benefits program.

Kimberly is a tenured professional with extensive experience in the Underwriting and Actuarial Services arena. Prior to joining our team, Kimberly spent 28 years in the underwriting department of Blue Cross Blue Shield of Delaware where she served as an Underwriting Senior Consultant and then promoted to

Tactical Manager where she provided operational management to the entire underwriting department. In this role, she was responsible for developing, evaluating, and recommending underwriting strategies designed to increase market share by providing cost effective solutions for clients. She was also involved in conducting analysis of client data and financials, monitoring performance, rate setting strategy, coaching and account level guidance and collaborating between sales, account management and other key internals. As Tactical Manager for over 10 years, Kimberly served as a company-wide resource on matters pertaining to rating and was responsible for reviewing and approving the work output of the entire unit, as well as delivering top-notch consulting work on the most “premier accounts”.

Kimberly Hall earned her Bachelor of Science Degree in Mathematics/Computer Science/Physics graduating Sigma Zeta Math/Science Honor Society from Immaculata College, Pennsylvania. Upon her move to Florida, Kim joined the Risk Strategies team in early 2015. Having worked with Local and National governmental accounts, her level of expertise has proven and invaluable resource to our team.

Wellness Resource: Joelle Kantor, Director of Wellness & Wellbeing Solutions

Professional Designations: MCHES, CCWS

Education: University of North Florida

Degree: B.S.H., Community Health, Minor Health Education

Industry Tenure: 10 years

Experience & Qualifications

A skilled professional with her focus in corporate wellness program implementation, Joelle has valuable experience in designing and implementing wellness, fitness, and health improvement programs and promotions. Joelle’s experience involves working with both large and small employee populations, and she is focused on long-term participation and results.

As the Director of Wellness & Wellbeing Solutions, Joelle employs a combination of experience, knowledge, enthusiasm, coordination, and empathy to deliver cost saving, achievable, proven, and innovative programs to our clients. During her years working in this specialized field, Joelle has worked in both the private and public sectors and has achieved a reputable resume which includes the planning and coordination of aggressive wellness program initiatives, wellness fairs and biometric screenings for large employee populations.

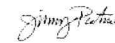
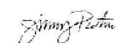
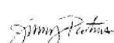
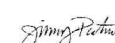
In addition to these accomplishments, Joelle holds a bachelor’s degree in Health Science from the University of North Florida, with a Minor in Health Education, and has also achieved the *Master’s Certified Health Education Specialist* and *Certified Corporate Wellness Specialist* health and wellness related credentials. Most recently, Joelle was certified as a Counselor for www.crisistextline.org.

2. Who would be the primary company representative that will be working with City staff?

Athena Erchard and Barbara Houghtaling will serve as the City’s lead employee benefits consultants and project managers. Their resumes are further detailed above.

3. Who will be the day-to-day contacts for the account? If applicable, attach a copy of each person's current Professional Regulation License.

Members of your Gehring Group/Risk Strategies team will be a day-to-day resource for City Staff, employees and retirees as needed. Copies of Florida Insurance Licenses are included below:

FLORIDA DEPARTMENT OF FINANCIAL SERVICES ATHENA MONIQUE ERCHARD License Number : A078425 <table> <tr> <td>Resident Insurance License</td> <td>Issue Date</td> </tr> <tr> <td>•0215 - LIFE INCL VAR ANNUITY & HEALTH</td> <td>04/06/2009</td> </tr> </table>  Jimmy Patronis Chief Financial Officer State of Florida	Resident Insurance License	Issue Date	•0215 - LIFE INCL VAR ANNUITY & HEALTH	04/06/2009	FLORIDA DEPARTMENT OF FINANCIAL SERVICES BARBARA LYNN HOUGHTALING License Number : A123702 <table> <tr> <td>Resident Insurance License</td> <td>Issue Date</td> </tr> <tr> <td>•0215 - LIFE INCL VAR ANNUITY & HEALTH</td> <td>05/31/2011</td> </tr> </table>  Jimmy Patronis Chief Financial Officer State of Florida	Resident Insurance License	Issue Date	•0215 - LIFE INCL VAR ANNUITY & HEALTH	05/31/2011
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Resident Insurance License	Issue Date								
•0215 - LIFE INCL VAR ANNUITY & HEALTH	05/31/2011								
FLORIDA DEPARTMENT OF FINANCIAL SERVICES JENNIFER LYNN WINTER License Number : W093148 <table> <tr> <td>Resident Insurance License</td> <td>Issue Date</td> </tr> <tr> <td>•0215 - LIFE INCL VAR ANNUITY & HEALTH</td> <td>12/19/2021</td> </tr> </table>  Jimmy Patronis Chief Financial Officer State of Florida	Resident Insurance License	Issue Date	•0215 - LIFE INCL VAR ANNUITY & HEALTH	12/19/2021	FLORIDA DEPARTMENT OF FINANCIAL SERVICES CHRISTINE TURNQUEST License Number : W578523 <table> <tr> <td>Resident Insurance License</td> <td>Issue Date</td> </tr> <tr> <td>•0215 - LIFE INCL VAR ANNUITY & HEALTH</td> <td>07/11/2019</td> </tr> </table>  Jimmy Patronis Chief Financial Officer State of Florida	Resident Insurance License	Issue Date	•0215 - LIFE INCL VAR ANNUITY & HEALTH	07/11/2019
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FLORIDA DEPARTMENT OF FINANCIAL SERVICES JESSICA ROBBIN LAMARCA License Number : W850299 <table> <tr> <td>Resident Insurance License</td> <td>Issue Date</td> </tr> <tr> <td>•0215 - LIFE INCL VAR ANNUITY & HEALTH</td> <td>04/20/2022</td> </tr> </table>  Jimmy Patronis Chief Financial Officer State of Florida	Resident Insurance License	Issue Date	•0215 - LIFE INCL VAR ANNUITY & HEALTH	04/20/2022	FLORIDA DEPARTMENT OF FINANCIAL SERVICES AMBER ARONSON License Number : W862601 <table> <tr> <td>Resident Insurance License</td> <td>Issue Date</td> </tr> <tr> <td>•0215 - LIFE INCL VAR ANNUITY & HEALTH</td> <td>06/01/2022</td> </tr> </table>  Jimmy Patronis Chief Financial Officer State of Florida	Resident Insurance License	Issue Date	•0215 - LIFE INCL VAR ANNUITY & HEALTH	06/01/2022
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Resident Insurance License	Issue Date								
•0215 - LIFE INCL VAR ANNUITY & HEALTH	06/01/2022								

4. How would the account team serve the City of Wildwood differently than your competitors?

Gehring Group/Risk Strategies is the ideal choice for the City's Employee Healthcare and Benefits Consultant services due to our exceptional service, extensive experience, and proven success with over 160 Florida public entities. Our team specializes in health and welfare plans, navigating complex funding arrangements, implementing tailored programs, and providing year-round service. We guide clients through the RFP, evaluation, and implementation process, ensuring compliance with public records laws, union negotiations, and government regulations. Our proactive approach includes continuous evaluation of cost-saving opportunities and emerging industry trends, providing innovative solutions that align with clients' goals. We deliver comprehensive services and clear communication, fostering long-term relationships built on trust and mutual success.

Competitive Advantages

In addition to our qualifications to perform the requested scope of work, a relationship with Gehring Group/Risk Strategies also provides the following key differentiators and competitive advantages:

- **98% Client Retention Rate:** We specialize in serving the unique needs of the public sector
- **Average Employee Tenure:** 6.7 years for all employees / 11.2 years for leadership team
- **Free Education, Training and Networking Opportunities** – Annual Client Summit, Seminars, Webinars, Newsletters, Workshops, Benefits Administration Training, etc.
- **100% Licensed Client Service Team** – all team members licensed to meet and advise employees
- **In-house Professional Graphics Team** – all communications developed in-house at no additional fee
- **No Commissioned Employees** – all decisions based the best interest of the client
- **Negotiation Leverage / Carrier Status** – Top tier producer recognition among all major carriers
- **Decades of experience with Employee Committees, Leadership, Staff and Unions** – we recognize the critical importance of establishing credibility and fostering robust communication channels
- **Human Capital Resources** – human resources experience, PHR, SPHR and/or SHRM-CP designations
- **Benefits Technology Experience** – experience in implementing and overseeing employee benefits administration technologies including Bentek® and Employee Navigator
- **Trade Magazine & Wellness Recognitions** – recognition for corporate culture and wellness achievement for our firm and our clients



We are confident in our ability to continue to provide the City of Wildwood with all required services, delivering additional value and best-in-class service. Our approach to business, combined with extensive experience in the public sector, knowledge of applicable regulations, strong market relationships, and genuine enthusiasm, positions us as the broker of choice.

Tab D:

Cost Competitiveness

Include a description of relevant compensation structures, minimums and maximums, variation in product markets or other relevant information that demonstrates fair and competitive compensation approaches.

With Gehring Group/Risk Strategies' focus on working collaboratively with our clients and their members throughout the year, and encouraging our clients to use us as a resource when needed, we are proposing a comprehensive level of employee benefits consulting services for your employee benefits coverage under the commission structure outlined below:

Contract Year	Annual Fee
Medical	6%
Dental	8%
Group Life & AD&D	10%
Dependent Life	10%
Supplemental Life	10%
Vision	10%
Voluntary/Supplemental Offering	Carrier Standard

It is important to note that Risk Strategies does not participate in any provider relationships that would prevent us from acting independently and providing objective advice and guidance. In addition, we practice full disclosure relating to all compensation with all clients.

Under the above compensation proposal, there be will no additional charges to the City of Wildwood by Gehring Group/Risk Strategies for the following:

- Employee Navigator Online Enrollment & Administration System
- Travel costs associated with servicing the City
- Onsite attendance at annual Open Enrollment meetings
- Development of annual employee benefit guide
- Access to *Mineral* online H.R. research tool

Gehring Group/Risk Strategies remains open to discussion regarding the above compensation proposal as well as alternative compensation options under consideration.

Tab E:

Method of Approach

Describe how company resources are managed to complete the work including allocations of general tools and equipment used. Describe strategies to ensure the highest quality of product and work is provided.

1. How will work be performed to enhance transitions when new providers are implemented?

After the marketing (RFP)/Renewal and evaluation or negotiation process, your Gehring Group/Risk Strategies team members remain involved and serve as an intermediary between each vendor and the City to assist with contract negotiations, program implementation, and enrollment. Planning for open enrollment begins well before renewal time. Our approach to open enrollment starts with the development of a renewal timeline detailing all aspects of the process, working backwards from the desired open enrollment period. Your Account Manager will be intricately involved throughout the planning, implementation, and enrollment process, helping to coordinate the various steps of the process to ensure a seamless transition. These services include but are not limited to:

- **Coordinating and Attending Meetings:** Assisting in the coordination and attendance of employee informational and enrollment meetings at all sites as determined by the client. This includes determining whether these meetings will be mandatory or optional.
- **Determining Meeting Formats:** Deciding on the format for open enrollment meetings, whether it be health fair style, group informational meetings, or one-on-one meetings.
- **Providing Support:** Supplying additional licensed team members to support enrollment meetings across multiple locations and various shifts if needed.
- **Logistics Coordination:** Organizing meeting locations, times, necessary collateral, and coordinating with carrier representatives if requested.
- **Developing Communication Materials:** Creating communication collateral such as open enrollment announcement posters, PowerPoint presentations, and annual employee benefits guides for employees, retirees, and special districts.
- **Facilitating Technology Integration:** Working with applicable technology partners (Bentek) to provide plan and cost updates for the enrollment site.
- **Managing Insurer Changes:** Facilitating the cancellation or renewal of the current insurer upon written acceptance.
- **Ensuring Vendor Compliance:** Making sure that applications and contracts for all new vendors are completed accurately and forwarded to the applicable vendors in a timely manner and reviewing all vendor contracts to ensure they align with what was proposed and presented.

We are committed to providing seamless and comprehensive support throughout the entire benefits process. From contract development and negotiation to open enrollment and ongoing vendor management, our dedicated team ensures that every aspect is meticulously handled. By partnering with us, the City can be confident in our ability to deliver effective, efficient, and innovative solutions that meet its unique needs and objectives.

2. How does your company plan to meet schedules and deadlines?

At the beginning of each plan year, Gehring Group prepares a timetable for activities including claims reporting, RFP schedules, anticipated meetings with City personnel, approvals needed for final decisions, etc. Gehring Group/Risk Strategies tracks the objectives, activities, tasks and communication with each client through our Veruna client management software. To streamline our service processes, we input tasks, communications, and activity dates into our client management software, ensuring that our entire team remains well-informed of all deadlines. This proactive measure enables us to effectively follow up with carriers well in advance and provide any necessary support to ensure the timely fulfillment of all client deadlines. By leveraging technology and meticulous planning, we uphold our commitment to delivering a smooth and efficient renewal and service experience for our clients.

3. What training resources does your organization provide to assist your clients in educating their employees?

Gehring Group/Risk Strategies places a high value on employee education and clear communication regarding the City's employee benefits offerings. With the aid of our professional in-house Graphics team, we will provide communication and education assistance through the ongoing development of various employee communication materials. These options include:

☒ Employee Benefits Guide

One of the tools necessary in the enrollment and communication process is the annual employee benefits guide. At the beginning of each new plan year, we compile all the information regarding your insurance coverages and summarize it in a custom employee friendly benefit booklet. This booklet has proven to be a valuable resource and has allowed members to clearly understand plan options, related costs to make decisions in their best interest each year. We will provide an electronic version of the annual benefit guide for posting on your intranet or applicable location.



☒ Professional Employee Communications

In addition to the provision of the employee benefits guide, we can also draft and produce employee communication pieces such as department posters, mass employee mailings, Wellness Program brochures, etc. which will allow the City to better communicate its employee benefit offerings, enrollment deadlines, wellness initiatives, and keep your employees well educated regarding their employee benefit options and responsibilities. Gehring Group produces all brochures and other work products in-house at no additional charge.



☒ Electronic Communication

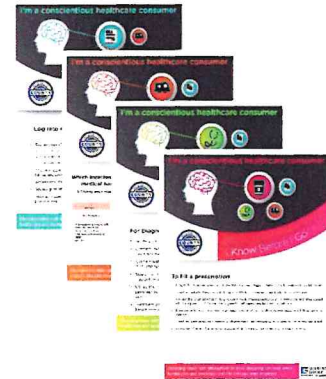
Gehring Group provides electronic and PDF versions of all above-referenced communications which can be emailed as an attachment, posted on your intranet, or posted to the applicable benefits enrollment system. These communications can include the annual Employee Benefits

Handbook, Wellness Program Brochure, Open Enrollment notifications, posters and various other notices and employee communications.

☒ **Employee Educational/Wellness Campaigns**

We also have pre-designed wellness campaigns and challenges that are easy to implement, relevant and timely. Some of the campaigns recently implemented by clients include a focus on being a conscientious consumer and include:

- Using your Flexible Spending Account
- Let's Get Appy (Using your carrier app)
- Preventive Healthcare Services
- Know Before You Go (Emergency vs. Non-Emergency)
- Wellness in a Box (Includes various wellness campaigns)



Our team can aid the City in developing a communication strategy and determining a targeted message.

4. How does your organization strive to streamline benefit administration for your clients? What is your methodology and involvement in claims and billing advocacy.

Streamlining Benefits Administration

For over three decades, our clients have depended on Gehring Group/Risk Strategies to deliver comprehensive benefits administration, technology, and compliance services. For the City of Wildwood, we propose the continued utilization of the **Employee Navigator** solution to allow you to easily setup, manage, and enroll your employee benefits online via a fully integrated solution that empowers employees to self-enroll and manage their own benefits. With Employee Navigator, employees can review & manage benefit details 24 hours a day 7 days a week. In addition, employers can:



- ✓ Get new hires enrolled quickly
- ✓ Compare and select plans
- ✓ Review coverage status for all employees
- ✓ Monitor employee enrollment status and deadlines
- ✓ Store, review, and acknowledge important plan documents
- ✓ File ACA 1095/1094-C forms

With **Employee Navigator**, employers can eliminate the hassle of dual entry, improve data accuracy, have electronic data transfer of eligibility and ultimately attract and retain talent.

Additional ways Gehring Group/Risk Strategies helps to streamline benefits administration and provide support on a day-to-day basis includes but is not limited to:

 Customer Service and Client Support

- Meeting with City staff on a regular basis (at least quarterly) to review plan performance and carrier service, and client satisfaction.

- Being an employee advocate and assisting employees with claim issues and benefit questions.
- Assisting HR with billing and administrative issues.
- Conducting employee surveys to determine employee satisfaction with benefit plans.
- Analyzing data to identify wellness and education targets.
- Continually monitoring claims experience to make projections in order to adequately prepare for renewal and budget planning.
- Providing onsite educational meetings to staff and employees.
- Attending employee benefits committee and other meetings as needed.



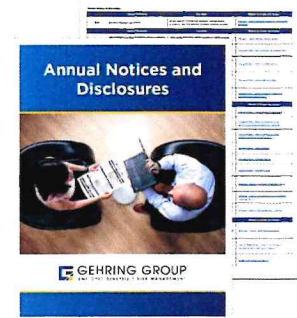
Benefit Plan Implementation and Open Enrollment Assistance

- Review of all contracts, Summary Plan Descriptions (SPD) and Plan Documents for accuracy and compliance.
- Coordinate and conduct open enrollment meetings and assist with the enrollment of all employee benefits.
- Providing additional staff to support multiple locations, shifts and times for employee and retiree meetings.
- Creating and producing annual benefits booklets and other employee communications.
- Coordinating all materials or carrier/vendor participation for open enrollment.
- Ensuring a smooth implementation with new vendors and ensure that all necessary paperwork is complete, and all policies are accurate according to what was sold.



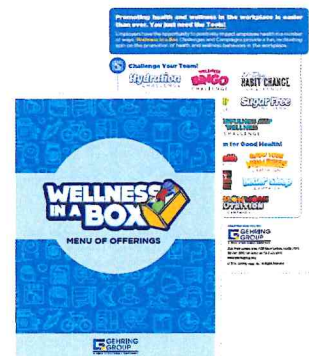
Compliance and Legislation

- Affordable Care Act guidance and planning.
- Email Newsletters, Webinars, and Seminars regarding legislative updates that impact our clients.
- Easy-to-Read Legislative briefs summarizing developments in HR, Insurance and Employee Benefits.
- “Annual Notices and Disclosures” checklist booklet to ensure that all requirements have been addressed.
- Access to Mineral (formerly Think HR), an HR research tool
- Access to educational opportunities and legal resources.



Wellness

- Assisting with the planning, coordination of and attending health and wellness events and any ongoing wellness initiatives.
- Implementing, Managing, and Evaluating the success of a wellness program.
- Negotiating and managing carrier Wellness Funds.
- Ensuring the wellness program is HIPAA, GINA, and EEOC compliant and within guidelines.
- Providing pre-designed wellness campaigns and challenges that are easy to implement, relevant and timely.



Based on our team and back-up approach for servicing our clients, your Gehring Group/Risk Strategies service team is truly an extension of, and a valuable resource for, the City's benefits administration and human resources staff.

Claims & Billing Advocacy

Members of your service team are not only available to benefits administration staff and decision makers but are also directly accessible by employees and retirees. We are available to assist the City and its employees in the resolution of unresolved claim issues. In addition to your assigned account manager, we also provide three in-house Client Service Specialists specifically for this purpose. These staff members are available to help employees work through claims issues by analyzing the issue and working with the carrier claims department or service representative as well as the provider's office to seek resolution. The internal Client Service Specialists are also intricate in helping to resolve escalated claims issues by assisting with writing appeal letters in the event a claim has been denied.

Two examples of Gehring Group/Risk Strategies' intervention that resulted in significant savings to employees include:

1. Assisting an employee in resolving \$19,000 of denied claims. The employee's dependent child had specific surgical procedure and was billed over \$19,000. The claims were denied because the carrier claimed a lack of medical necessity. Our team worked closely with both the provider and the insurance carrier to provide the medical necessity information and documentation in order to have the claims reprocessed and paid, resulting in the employee only owing his \$500 deductible and a \$150 facility copay.
2. The dependent of an employee was in skiing accident and received emergency care out of state. After the surgery, he received a "boot" from an out-of-network durable equipment provider. The carrier denied this claim, stating that it was considered a non-covered service and the member was then billed \$966. Our team worked with the employee to write an appeal letter on the member's behalf and provided all medical documentation for the carrier to reconsider covering the expense. The appeal was approved and this claim for \$966 was processed and paid in-network at 100%.

Our Gehring Group/Risk Strategies' team will follow up with the applicable carrier claims department or service representative and assist in gathering all required information and documentation and continuously follow up throughout the appeal process. Our team will exhaust all avenues in their efforts to bring each employee issue to resolution.

5. What is your average response time to questions regarding claim and eligibility issues? How do you handle follow up to outstanding issues?

Gehring Group/Risk Strategies operates under a unified service approach, whereby all staff is responsible for the successful servicing of all clients. We utilize our resources to provide value added services and to hire highly qualified, professional, productive individuals who bring the skills and capabilities to meet our stringent expectations.

Our standard is to return a call promptly; in addition, our clients enjoy the ability to always get a message to their account managers who are out of the office either through their cell phones or

through our administrative assistant. All account managers have technology tools that accommodate their ability to be responsive including laptops, cell phones, and tablets. Additionally, all managers and executives employ a hands-on approach regarding their positions, offering another integral level of availability and expertise to our clients. When an urgent request is received, such as an employee who is unable to obtain a prescription or other matters that concern an employee's ability to receive care, Gehring Group/Risk Strategies' in-house account representatives who work alongside the account managers are available to see these types of issues to resolution quickly. Each issue is logged into our agency management system, so that our team can track through completion. For more complex claim issues, such as assisting employees in receiving reimbursement for a claim processed incorrectly, our management system enables us to set reminders to follow up with providers, carriers and as well as the employee to communicate the status of our efforts. Turnaround time may vary based on the complexity of the issue; however, our policy is to follow up at least weekly regarding claims issues.

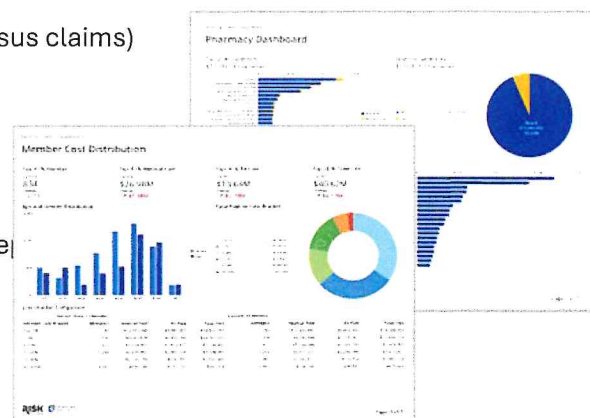
At Gehring Group/Risk Strategies, we rely on our clients to be our references, and insomuch we work toward not only being excellent technicians but also excellent communicators and a valued resource for all their benefits needs. Our staff understands the value of our reputation and the importance of meeting our clients' expectations. We are always communicating not only with our clients, but also internally to ensure that we are on track with meeting client expectations and delivering quality service and expertise to every client.

6. What tools are used in data analysis? Describe your utilization data analysis capabilities.

Gehring Group/Risk Strategies provides our clients with reporting that is relevant to their funding arrangement on a timely basis, typically monthly or quarterly. This includes monthly monitoring of each client's claims utilization, analyzing key indicators such as average claims cost per employee, average cost per member, large claims data, and top utilized drugs. This consistent review of data uncovers trends in utilization, the cost impact of chronic conditions, and overall claims expenditure, aiding in the development of accurate renewal projections.

We also monitor the group's "large claims" (i.e., claims approaching or exceeding the specific stop loss deductible or pooling level if fully insured) on a regular basis. These reports include but are not limited to:

- Claims experience (premium/funding versus claims)
- Cost per employee per month
- Renewal cost projections
- Executive cost summaries
- Large claimant lists
- Top utilized prescription drug utilization report
- Monthly Reinsurance claims report
- Provider displacement analysis
- Summary of benefits comparisons
- Real-time entity benefits surveys



We also provide other key indicator reports, typically annually, to assist in identifying additional risks and/or targets for wellness initiatives. Examples of our monthly claims dashboard are included in **Exhibit 3** for your review.

7. Who will complete this analysis and how will the results be shared with the City?

Your assigned Employee Benefits Analyst, in collaboration with your Benefits Consultants, will monitor the City's claims utilization on a monthly basis. We will review key indicators such as average claims cost per employee, average cost per member, large claims data, top 50 utilized drugs, and the percentage of prescription drugs to total plan costs. Our consistent review of this data will reveal trends in utilization, the cost impact of chronic conditions, and overall claims spend, assisting in the development of renewal projections. These results will be shared with the City on a monthly or quarterly basis, according to your preference.

Additionally, we will meet with City staff on a quarterly basis, either in person or virtually, to review and present our analysis. We will make recommendations regarding plan design, market solicitation, and new products and services as necessary.

8. What are your problem-solving methods (in detail) regarding dealing with any benefits-related issues that arise with City employees? Provide an outline of steps of how you may resolve a benefits-related issue.

At Gehring Group/Risk Strategies, we are dedicated to providing exceptional support and solutions for all benefits-related issues that may arise with City employees. Our comprehensive approach ensures that every claim is handled with the utmost care and precision, leveraging our knowledge and resources to achieve the best possible outcomes for our clients. This approach includes:

1. **Direct Accessibility and Support:** Members of our service team are not only available to benefits administration staff and decision-makers but are also directly accessible by employees and retirees. We are committed to assisting the City and its employees in resolving any unresolved claim issues.
2. **Dedicated Client Service Specialists:** In addition to your assigned account manager, we provide three in-house Client Service Specialists specifically for this purpose. These specialists are available to help employees work through claims issues by analyzing the problem and collaborating with the carrier claims department, service representative, and the provider's office to seek resolution.
3. **Detailed Issue Analysis:** Our team begins by thoroughly analyzing the issue at hand. This involves understanding the specifics of the claim, identifying the reasons for denial or delay, and gathering all necessary documentation and information.
4. **Collaboration with Carriers and Providers:** We work closely with the carrier claims department and the provider's office to address the issue. This includes providing any additional information or documentation required to support the claim and ensuring that all parties are aligned in seeking a resolution.

5. **Escalation and Appeal Process:** For escalated claims issues, our Client Service Specialists assist in writing appeal letters if a claim has been denied. We provide comprehensive support in gathering and presenting the necessary medical documentation and justification to the carrier for reconsideration.
6. **Continuous Follow-Up:** Our team continuously follows up with the applicable carrier claims department or service representative throughout the appeal process. We ensure that all required information and documentation are provided promptly and that the issue is monitored until resolution.

Our Gehring Group/Risk Strategies team is dedicated to resolving benefits-related issues efficiently and effectively. We leverage our experience, industry relationships, and proactive approach to ensure that each employee receives the support they need and that claims are handled accurately and fairly. Examples of our success in assisting employees are included in #4 above.

9. **How would you provide proactive, front-facing customer support with an example of how your acts of being proactive better served an organization you are currently providing services to and what benefit that organization received?**

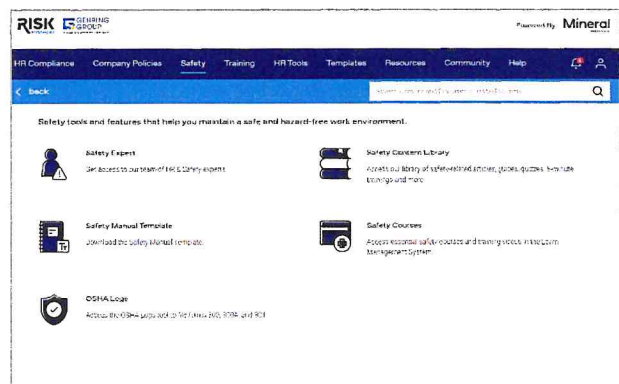
At Gehring Group/Risk Strategies, we prioritize proactive, front-facing customer support to ensure our clients receive exceptional service and timely solutions. Our commitment to anticipating and addressing needs before they arise allows us to deliver unparalleled benefits and support. By actively engaging with our clients and staying ahead of industry trends and legislative changes, we can provide innovative solutions that enhance employee benefits and overall satisfaction. Our proactive approach is demonstrated through various initiatives, including but not limited to:

- **Firefighter Cancer Bill Workshop** – Upon the passing of this new legislation, Gehring Group/Risk Strategies was the first to host a legislative workshop with a panel of legal experts from such firms as Ford Harrison; Abbey Adams Byelick & Mueller, LLP; Seyfarth Shaw; and Lewis, Longman & Walker, PA to review and discuss the benefits and administrative implications of the bills.
- **In-House Graphic Services** – Gehring Group develops and produces annual employee benefits highlights booklets and other communication materials to educate employees regarding their benefits.
- **Imputed Income** – Gehring Group educates our clients on the requirement to report imputed income on the W-2 for the value of health coverage for non-dependent Domestic Partner and Overage Dependents.
- **First Responder Mental Health Workshop** – Recognizing the growing concern for employee mental health, we have made significant investments to expand our knowledge and service offerings in this area. This includes having two employees certified as National Council Mental Health First Aid instructors, enabling us to proactively address increasing concerns around mental health and substance use disorders. Another example of Gehring Group/Risk Strategies' market awareness is our hosting of a First Responder Mental Health Focus Group to address the specific concerns of our clients' Police and Fire employees.

- **Pharmacy Savings Alternatives** – Our team can provide educational sessions regarding lower cost options to purchase prescriptions through a number of cost-savings programs outside of their insurance plan. These resources are not insurance programs and the amount paid may not count towards deductibles or out of pocket costs, but may provide substantial savings to the employee, as a consumer. These programs include Amazon RX Pass, CostPlus Drug Company, Costco & Sams Club's Member Prescription Programs. The goal is to educate employees of other resources to achieve lower cost alternatives and how price shopping can help lower health care and insurance costs.



- **Mineral Online Human Resources Research Tool** – Gehring Group/Risk Strategies provides Mineral to all clients at no additional charge. Mineral offers a one-stop resource for quick answers to thousands of human resources and employee benefits questions covering such issues as record-keeping, employment law, wages and withholding, workers' compensation, harassment, ERISA, COBRA and FMLA. Mineral provides you with easy and immediate access to expert HR advisors who will provide information and answers in a timely manner to minimize the exposure and risk associated with legal and regulatory matters. These answers are provided via phone, web or email, followed up with a written response to summarize the issue and result. This services also includes over 200 safety training courses and the ability to assign and track completion of training.



Renowned for our innovative spirit in the employee benefits marketplace, we meticulously evaluate emerging cost-saving options to gauge their suitability for our clients. Maintaining a steadfast commitment to staying ahead of industry trends and market dynamics, we continuously explore novel concepts and new types of health insurance programs presented by insurers and third-party administrators. Leveraging our knowledge and experience across diverse plan designs and funding arrangements, our consultants empower clients to identify carriers and programs that align with their objectives enabling them to make well-informed decisions regarding the adoption of new concepts. Some of these concepts include:

- Innovative and holistic wellness programs,
- Onsite/near-site clinics,
- Telemedicine,
- Customized employee assistance programs and mental health services,
- Value-based plan designs,
- Specialty physician designation cost share differences,
- Plans with “narrow networks”,

- Pharmacy oversight services,
- International prescription sourcing,
- Specialty care including programs such as Regenexx, Surgery Plus, Omada, etc.
- Captive funding arrangements, and more.

We are always looking to collaborate with our clients to seek out proactive options to add value to the employee benefits program.

CASE STUDIES

There are many examples in which Gehring Group/Risk Strategies has aggressively pursued a cost-effective benefits program for its clients. The following includes actual case samples of Risk Strategies' clients ranging in employee size, who have experienced notable savings due to our proactive benefits consulting, negotiating experience, value-added services and knowledge of product offerings:

Case Study #1: Municipality (1,050 employees)

Implementation of Regenexx Program

Regenexx procedures offer non-surgical treatment options for individuals suffering from orthopedic issues such as osteoarthritis, joint injuries, spine pain, overuse conditions, and common sports injuries. Their proprietary, research-based methods and patented protocol enable doctors to concentrate your cells and apply them precisely to the injured area. They report a success rate of 97.7% to 100%, depending on the service performed.

In the first year of implementation, the goal was to avoid various orthopedic surgeries, thereby enhancing the City's benefits offering and reducing surgical costs. Since Regenexx is not a covered benefit under the carrier's policy, claims were filed manually through an ASO override process. Additionally, our team negotiated with the City's stop-loss carrier to cover any potential complications, though they were unlikely.

During the program's first year, 29 inpatient hospital procedures were avoided, as employees utilized Regenexx for various orthopedic treatments. The total cost for these 29 members under the Regenexx program was \$308,554, which was paid directly by the City. Treatments included services for the spine, elbow, knee, shoulder and ankle.

Return on Investment

To determine the return on investment of the program, our team utilized two calculation assumption methods: *Cost avoidance* and *health plan utilization trend*. The results of this analysis revealed a savings of over \$200,000 to the medical plan, a 1.7 to 1 ROI in the first year.

In addition to the hard dollar savings associated with the cost avoidance, other savings potentials not captured in our analysis include: presenteeism associated with quicker recovery vs. an invasive surgery and the avoidance of long-term issues associated with surgery (scar tissue, complications, etc.).

employees, minimizing the potential disruption to care. Given these insights, and following a comprehensive cost-benefit assessment, the City opted to transition its health plan to the “Narrow Network” to capitalize on the projected savings without significantly impacting employee access to care.

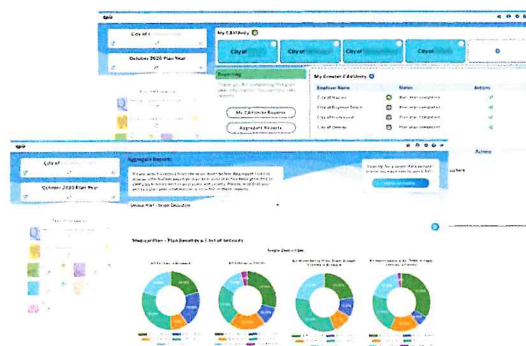
In addition to facilitating this transition, our team took proactive steps to enhance the value of the switch. We successfully recruited several of the City’s most frequently utilized providers into the “Narrow Network,” ensuring even greater continuity of care. To ensure a smooth transition, we also developed a comprehensive Open Enrollment presentation aimed at educating employees on the changes, providing them with a clear understanding of how the new network would operate and what benefits they would continue to receive.

Thanks to our meticulous planning, targeted communication efforts, and minimal disruption to provider access, the transition to the “Narrow Network” was executed seamlessly and received positive feedback from both the City and its employees.

10. What source for benefit plan design and cost benchmarks would you use to provide a market perspective on the City of Wildwood’s benefit programs?

Gehring Group/Risk Strategies’ concentration in the public sector enables us to have access to a significant amount of public sector employee benefits benchmark data in-house. This includes statistics on plan benefits, employer contributions, waiting periods, trend factors in carrier renewal calculations and other related data. In addition, we conduct local entity surveys on a regular basis throughout various regions of the state of Florida. We realize the value in maintaining a competitive benefits package as it relates to employee hiring and retention.

Recognizing the value of a public entity’s benefit program offerings, Gehring Group/Risk Strategies has most recently developed a new public sector ‘real time’ benchmarking tool. CAVU® is an online employee benefits benchmarking software specifically for public sector employers and is scheduled to be live and online in 2020. With this tool, public sector employers will have the ability to complete a survey to enter their plan benefits and costs, compare their cost and benefits to other participating employers, and even invite other entities to participate. CAVU will provide valuable information on costs and benefit trends to aid public sector employers in making important decisions regarding plan options, schedules of benefits and employer/employee contributions.



Many national broker/consulting firms boast about their benchmarking reports, the results of which include employers from every industry, public and private sector, and locations across the country. However, we know that insurance is purchased on a local basis and comparing these results to data captured solely from the public sector is like comparing apples to oranges and can skew the output being considered. Depending upon the industry, there can be considerable employer contribution and schedule of benefit disparities especially when comparing private sector and public sector benefit plans as employee benefits are a key recruiting tool for public sector employers. With CAVU,

employers can pick the entities they would like to compare themselves too, and if an entity hasn't completed the survey yet, they can invite them to participate. Examples of reports and screen shots are included below for your reference.

11. How do you propose to build an understanding of the direction and priorities of the City of Wildwood's business and how you would use this information in order to anticipate our benefit needs? Include examples of key deliverables you provide as part of that process.

Our strategy and service philosophy center around maintaining a continuous, year-round engagement with our clients, rather than limiting our involvement to renewal periods. To build an understanding of the direction and priorities of the City of Wildwood's business, we propose the following approach:

1. **Comprehensive Review and Analysis:** We will conduct a thorough review of all lines of coverage and benefits included in the total employee benefits program package. This will involve understanding the specific needs and goals of the City of Wildwood and aligning our services accordingly.
2. **Regular Communication and Collaboration:** We will establish regular communication channels with City officials and key stakeholders to stay informed about the City's evolving priorities and business direction. This includes scheduled meetings, feedback sessions, and ongoing dialogue to ensure we are aligned with the City's objectives.
3. **Data-Driven Insights:** We will monitor monthly claims experience, analyze trends and patterns in claims utilization, employee needs, and market conditions. This will help us anticipate future benefit needs and provide proactive recommendations that align with the City's priorities.
4. **Tailored RFP Development and Evaluation:** We will develop and conduct RFP processes tailored to the City's specific requirements. By evaluating proposals and negotiating renewals with a focus on the City's strategic goals, we ensure that the benefits program remains competitive and cost-effective.
5. **Legislative Updates and Education:** We will provide regular legislative updates, guidance, and education to keep the City informed about relevant changes in laws and regulations. This proactive approach helps the City stay compliant and adapt to new requirements effectively.
6. **Continuous Improvement and Innovation:** Our team will continuously seek opportunities to enhance and improve the employee benefits program. By staying ahead of industry trends and leveraging innovative solutions, we ensure that the City's benefit needs are met efficiently and effectively.

By maintaining year-round involvement, leveraging data-driven insights, and fostering regular communication, we will build a deep understanding of the City of Wildwood's direction and priorities. This enables us to anticipate benefit needs and provide tailored solutions that support the City's strategic goals. This entails meticulous planning and clear communication of expectations. At Risk Strategies, we adhere to a structured approach by crafting a comprehensive timetable of activities at the onset of each plan year. This schedule encompasses critical milestones such as:

- ✓ Quarterly claims reporting,
- ✓ Request for Proposal (RFP) schedules,
- ✓ Deadlines for renewal offers,
- ✓ Anticipated meetings with City personnel,
- ✓ Wellness planning & strategy,
- ✓ Approval dates for final decisions, and
- ✓ Open enrollment timelines.

To streamline this process, we input these dates into our client management software, ensuring that our entire team remains well-informed of all deadlines. This proactive measure enables us to effectively follow up with carriers well in advance and provide any necessary support to ensure the timely fulfillment of all City deadlines. By leveraging technology and meticulous planning, we uphold our commitment to delivering a smooth and efficient renewal experience for our clients.

A sample timeline of activities is outlined below. This schedule can be customized to accommodate any specific needs or additional services requested by the City.

Proposed Schedule of Activities	
Date	Action
5-6 months prior to renewal	• Risk Strategies' review of current employee benefits program utilization including large claims (if available) • Pre-Renewal Meeting with employee benefits Staff to discuss vendor satisfaction and strategy • Lead Consultant requests coverage renewals from incumbent carriers • Preparation and release RFP to carriers for all applicable lines of coverage (if deemed necessary) or begin renewal negotiation
4 months prior to renewal	• Review Quarterly claims experience & meet with City Staff • <u>If RFP is issued:</u> ○ Risk Strategies receives proposal responses from Purchasing ○ Risk Strategies review and analysis of proposals ○ Draft of initial review presented to Staff ○ Interview finalists (if deemed necessary) ○ Best and Final offers due ○ Risk Strategies recommendation / Risk Strategies available to make presentations to committees and Board ○ City makes selection • <u>If renewal negotiation (RFP not issued):</u> ○ Our team will aggressively negotiate renewal premiums and/or fees and stop loss premiums ○ Review all available plan option alternatives (deductibles, etc.) ○ Analyze claims data to determine for cost reduction targets
3 months prior to renewal	• Make presentations/recommendations to Leadership as needed • Preparation of Open Enrollment Materials including Employee Benefit Guide and communication posters, payroll stuffers, etc.

Proposed Schedule of Activities	
Date	Action
	• Discuss and finalize employer contribution strategies • Plan Implementation
2 months prior to renewal	• Review Quarterly claims experience & meet with City • Refine Open Enrollment Materials including Employee Benefit Guide, communication posters, etc. • Plan open enrollment meeting schedules, locations, carrier invites, meeting format, etc. • Finalize employer contribution strategies • Completion of implementation paperwork with carriers • Implementation meetings with all applicable carriers in the event of a carrier change
1-2 months prior to renewal	• Open Enrollment Meetings • Carrier contract and plan document review for accuracy • Finalize all details regarding new plan year • Open Enrollment makeup meetings
October 1 st	• Plan Year Begins
1 st quarter	• Review Quarterly claims experience & meet with City Staff • Additional meetings with Staff and/or employees • Provide ongoing support to employee questions
Beginning of 2 nd quarter	• Review Quarterly claims experience & meet with City Staff
2 nd quarter	• Monitor claims experience • Additional meetings with City Staff and/or employees as needed • Request renewals

Having a clear timeline is crucial to a successful employee benefits renewal process as it ensures all tasks are completed in a timely manner, allows for thorough employee education, and helps maintain clear communication and coordination among all stakeholders.

Tab F:

Additional Information

Provide additional information describing your company's capability to perform the work advertised in the Scope of Services of the RFP.

Gehring Group/Risk Strategies employs a holistic and strategic approach to delivering the scope of services outlined, ensuring comprehensive support for the City's health insurance and employee benefits program. Our comprehensive level of service includes all services requested within the RFP, assisting the City with all aspects of its health insurance and employee benefits program including Medical, Prescription, Dental, Vision, Life, Long and Short-Term Disability programs. We understand the City's desire to offer its employees a competitive benefits package to attract and retain valued employees. Inherent in this process is marketing and renewal analysis, renewal negotiations, the RFP and evaluation process, claims monitoring and data analysis, recommendations to staff, employee advocacy, assistance with compliance issues and open enrollment assistance to ensure comprehensive and cost-effective benefits options. Our approach to employee benefits advisory services is based upon sophisticated analysis of data, awareness of local and regional options, local benchmarks, and the strategic focus to help our clients chart a course for the long term and not just the renewal or the next open enrollment.

Our strategy and service philosophy center around remaining involved with our clients on a year-round basis. Our comprehensive level of service includes strategic planning, claims monitoring, employee advocacy, preparing insurance specifications (the RFP), evaluating proposals and renewal offers, and making recommendations based on our comparative analysis of costs and coverage. Our comprehensive service and benefits marketing process includes the following steps:



Market Solicitation (The RFP Process)

To provide you with enough time for the RFP process and subsequent decision-making process, we will prepare a timetable of activities including any approvals needed for final decisions. (See timeline outlined above.) This schedule can be customized to accommodate additional onsite meetings, and any specific needs or additional services requested.

Our team, in conjunction with the Human Resources/Benefits department, will prepare and release all requests for proposals as directed for all applicable lines of coverage. As part of our service, we conduct all phases of the procurement process for those lines of insurance as requested, from RFP development through the proposal analysis and recommendation process, coordinating with the City's HR and Procurement Departments as needed. This includes:

- Exploring all feasible plan designs, for employee benefit programs as needed
- Developing evaluation criteria.

- Addressing any questions from vendors in the RFP process.
- Be present and participate in oral interviews as needed.
- Preparing a report analyzing the proposals using the evaluation criteria.
- Preparing recommendations and defense of said recommendations if requested.

Our involvement in this process is very comprehensive. We feel it is our job to keep our clients up to date regarding any new products in the industry that may reduce administrative burden for the City or aid in the reduction of health care costs. We have extensive experience marketing all lines of coverage, evaluating alternative funding arrangements as well as bidding for any additional coverages requested.

Proposal Evaluation & Recommendation

Upon receipt of proposals submitted in response to the RFP process, our team will perform a detailed analysis of each program offered. We compare all proposals side by side to the in-force program and illustrate the program differences to identify the advantages and disadvantages of each. This will include a detailed cost comparison which outlines the total cost of the program in addition to breaking down the costs related to employer and employee contributions and detailing all applicable proposal caveats or opportunities for multi-line discounts.

At this time, we will also compare provider networks to determine which proposers may be considered viable options in addition to performing a network disruption analysis and network discount analysis. During this stage in the procurement process, we will meet with Staff to review our initial findings. Once our analysis has determined that particular vendors are viable based on cost, schedule of benefits, value-added services, A.M. Best rating, etc., we then attempt to clear up any details that must be clarified prior to making a recommendation. This process is a second level request for clarification and is conducted following the review of submitted proposals. As insurance is one of the few areas in public entity purchasing regulations where simultaneous negotiations can take place, it is always important for the RFP process to include a “best and final” interview process within the RFP timeline, negotiating performance guarantees where applicable. After such finalist negotiations and continuous communication with staff, we will provide our formal evaluation and recommendation, based on the City’s needs and financial goals.

Plan Renewals & Effective Negotiations

In addition to conducting a formal RFP or market solicitation, our analysts will develop and assist with budget projections and request early renewal proposals to begin aggressively negotiating pricing and terms for your plan renewals. This is done early in the process to ensure the least amount of disruption as possible to your membership while balancing the client’s needs, goals, and union commitments. Our specific focus on serving the public sector and client base in the region and state allows us to leverage the credibility we have established with insurance carriers and government trusts more efficiently. It is also important to note the ability of our experienced team to not only effectively negotiate the benefits and costs of your program(s), but also value-added services and benefits such as wellness services/funding, onsite carrier support, technology funding and aggressive pharmacy rebate returns. We get results both for the employer providing the benefit program and each and every member enrolled.

Developing a Long-Term Strategy

Gehring Group/Risk Strategies takes a comprehensive and innovative approach to employee benefit program strategy, focusing on cost containment and improving overall health and well-being. We have successfully implemented numerous programs that control costs while enhancing the health and satisfaction of employees. Our cost-saving recommendations cover plan design, alternative funding arrangements, and employee benefits education, all aimed at maintaining or increasing employee satisfaction.

Our team develops long-term strategic plans by considering a variety of factors. We conduct regular meetings with you to understand your organization's goals, budget, culture, and plan competitiveness compared to benchmarks and local entities. We analyze your organization's multi-year loss experience to forecast scenarios for your current plan design and provide annual budget projections based on actual claims utilization. Our review also takes into account agreements from collective bargaining and retiree offerings.

With extensive experience serving the public sector, we recognize that each client has unique needs. Factors such as geographic location, culture, employee demographics, union relations, and retiree coverage require a customized approach. Risk Strategies tailors its recommendations to each client's specific situation, focusing on sustainable, long-term cost savings rather than merely reducing benefits to generate premium savings. Our objective is to maintain lasting client relationships and assist our clients in developing long-term strategies that align with their overall financial goals. Maximizing the value of your benefits dollars is our primary goal in serving our clients.

SCOPE OF SERVICES

We would like to take this opportunity to address each item in the Scope of Work as outlined in the City's RFP No. 2025-07 for Benefits Consulting and Broker Services to further elaborate on the extent of our services:

1) Review and Advise

- A. The selected service provider shall assist and advise in reviewing the City's insurance benefit plans on a continuing basis to ensure the plans are in compliance with all state and federal regulations.**

Gehring Group/Risk Strategies maintains a strong commitment to ensure our clients remain in compliance with state and federal regulations and that all benefit plan offerings and related documents are up to date. We remain at the forefront of pending and new legislation to educate our clients in a clear and understandable, timely manner regarding federal and state legislation, including the Affordable Care Act, Firefighter Cancer Bill, FFCRA, CARES Act, ARPA, Inflation Reduction Act, HIPAA, COBRA, GINA and more. We employ a proactive approach to compliance, learning, interpreting, and educating our clients regarding all applicable regulations as released and keep you up to date on all regulatory changes through our newsletters, webinars, seminars, workshops, and other educational opportunities.

We remain vigilant in keeping our clients informed of any regulatory changes that may impact them, ensuring they stay abreast of evolving compliance requirements. Risk Strategies employs several methods of educating our clients about changes in federal, state, and/or local laws. These include:

✓ **Educational Newsletters**

Gehring Group/Risk Strategies provides you with updates regarding any changes in applicable laws and how they might affect your benefits program via our educational newsletters which are distributed via email. (Samples included in **Exhibit 5.**)

✓ **Client Seminars/Webinars**

Gehring Group/Risk Strategies hosts several client seminars/webinars each year on various topics in order to ensure that our clients have all the information needed to be adequately prepared for any new mandates and are comfortable in their understanding of all requirements. Employers can take advantage of the educational opportunities available at our annual Public Sector Summit, Mental Health First Aid Workshops, Benefits Administrator Workshops and more. Another example of our continued engagement with our clients on relevant topics includes our Police and Fire Mental Health Focus Group recently held onsite at our Palm Beach Gardens location.

The following includes a sample of webinars and trainings Risk Strategies has hosted and presented during the past two years:

Date	Client Educational Opportunity
February 21, 2023	Webinar – The End of the Public Health Emergency
March 16, 2023	Webinar – What SECURE Act 2.0 Means for your Pot of Gold
May 16, 2023	Public Sector Client Summit - Keys to Caregiving for the Sandwich Generation
June 7, 2023	Webinar – The Latest in Legislation: Retiree Updates
June 12, 2023	Webinar – The Long Goodbye: Preparing for the End of the Outbreak Period
June 14, 2023	Webinar – Florida's Latest Health Care-Related Bills
August 15, 2023	Workshop - Building Blocks of HR: Fundamentals of FMLA
October 24, 2023	Webinar – Gag Clause Prohibition – Guidance for Employers
November 7, 2023	Webinar – It's 1095 Time
February 27, 2024	Workshop – Benefits Administrator Workshop 1.0
April 24-25, 2024	Public Sector Client Summit – Leading Through Storytelling: How Stories Shape Us and Connect Us”
June 25, 2024	Webinar – Dueling Mandates – Section 1557 of the ACA
July 17, 2024	Workshop – Benefits Administrator Workshop 2.0
October 1, 2024	Webinar – Understanding Recent Changes Affecting Creditable Coverage
November 14, 2024	Webinar – Transparency in Action: Gag Clause Attestation & the Prescription Drug Reform Act

Date	Client Educational Opportunity
January 30, 2025	Webinar – Preparing for the Upcoming ACA Reporting Season: What’s New & What to Know
February 12, 2025	Workshop – Benefits Administrator Workshop 1.0
March 5, 2025	Workshop – Benefits Administrator Workshop 2.0

Gehring Group/Risk Strategies hosts regular **Benefits Administrator Workshops** for our clients’ benefits administration staff during which we review such topics as the basics of coverage types, plan year administration, the RFP and purchasing process, notional accounts, best practices, statutes surrounding Sunshine Laws, benefit program reporting, benefits program and ACA compliance, and many other topics based on feedback from our clients.

✓ **Face-to-Face Meetings**

Lastly, Gehring Group/Risk Strategies is committed to meeting with clients face-to-face to address their unique issues and opportunities. Our goal is to provide comprehensive training and support tailored to each client’s needs. As members of the agent advisory councils for many major insurance carriers in the state, we are often among the first to learn about new health plan trends and product offerings resulting from legislative mandates. This allows us to keep our clients well-informed about new programs and potential cost-saving opportunities. Additionally, we ensure that each client is updated on any changes in state or federal regulations that may impact them.

Risk Strategies has taken a proactive stance and is consistently monitoring the current events taking place amidst the current fast-paced legislative environment. We will continue to provide you with updates regarding any changes applicable to client benefits programs and assist in planning and preparation to remain in compliance with all legislative requirements.

B. The service provider shall ensure the benefit plans are competitive in nature and cost. The City expects that recommendations will be made with respect to plan design alternatives and providers as dictated by trends, best practices, and availability of services.

Our goal at Gehring Group/Risk Strategies is to help your organization and members save money through effective and proactive planning, negotiations, innovative ideas, wellness initiatives, and efficient implementation and management of your benefits programs. This includes ensuring that the City’s plans remain competitive in nature and cost. Our three main objectives are to control costs, streamline administration, and provide first class customer service for you and your employees. We are fully committed to anticipating and fulfilling your needs.

To accomplish this, our services include conducting a formal RFP or market solicitation process for the lines of insurance coverage included within your employee benefits program, developing mid-year budget projections, requesting renewals from benefit vendors, conducting renewal analysis, analyzing plan changes and alternatives, aggressively negotiate renewal proposals, and more. In addition, our specific focus on serving the public sector allows us to leverage our knowledge of other comparable public entity benefits programs in addition to leveraging the credibility we have established with insurance carriers and government trusts more efficiently. Our experienced team is skilled in not only effective negotiations related to benefits and costs,

but also value-added services and benefits such as wellness services and funding, onsite carrier support, technology funding and aggressive pharmacy rebate returns. We get results both for the employer providing the benefit program and each and every member enrolled.

C. A review and analysis of the goals and objectives of the benefit design shall be completed to ensure that they are sound and focused on meeting the needs of City employees.

One of our primary tasks with all clients is to conduct a review and analysis of the goals and objectives of the benefit design to ensure they are sound and focused on meeting the needs of City employees. We understand the fact that an employee health benefits program is a significant cost driver to any employer's budget, as well as the greatest tax favored benefit an employer can provide an employee. Through our year-round service philosophy and approach, we have achieved consistent and proven success in not only meeting the current short-term needs of our clients and their members, but also employing a number of strategies in developing a long-term strategic plan. Our approach includes meetings with you to understand your organization's goals, budget, organizational considerations, culture, pending/current legislation, and plan competitiveness compared to benchmark and local entities. Additionally, we review historical claims experience, forecasting scenarios for your current plan design and providing the City with independent annual budget projections based on actual claims utilization.

We understand that employee benefits are a very important aspect of an employee's compensation package to attract and retain strong talent. Accordingly, a long-term strategic benefit plan must be in place to allow both the employer and employee to anticipate and prepare for any anticipated modifications be it financial or regarding plan design and benefit options. Gehring Group/Risk Strategies has the tools and knowledge to guide the City down this path. Our goal is to maintain long-term client relationships and assist our clients in developing long range strategies to conform to the client's overall goals and commitments and get the most out of your benefit dollars.

D. Reviewing contracts, plan documents, insurance policies and related documents to ensure technical accuracy and consistency is a critical role of the selected service provider.

Your Gehring Group team will meticulously review all contracts, plan documents, insurance policies and related documents to verify technical accuracy and consistency as it relates to premium rates, benefits eligibility, and coverage. We will ensure that benefit plans, terms and costs negotiated are precisely reflected within the contract documents. Our thorough review process aims to eliminate any discrepancies and guarantee that the terms agreed upon are accurately documented, providing clarity and assurance to all parties involved.

2) Provide Consulting

A. The provider shall be required to regularly provide information related to pending or new legislation, benefit funding and market trends as well as making recommendations on how to respond to such information.

Gehring Group/Risk Strategies stands out as an industry leader, consistently pioneering new insurance and healthcare concepts while keeping our clients abreast of evolving legislation. We pride ourselves on our proactive approach, and we envision a benefits program where our clients can capitalize on every available cost-saving insurance concept and funding arrangement while providing comprehensive benefits coverage and remaining in compliance with all regulations. Our track record includes groundbreaking initiatives such as the introduction of consumer-driven health plans and innovative strategies like onsite clinics in the public sector. Maintaining a steadfast commitment to staying ahead of industry trends and market dynamics, we continuously explore novel concepts and new types of health insurance programs presented by insurers and third-party administrators.

- B. The selected provider shall advise and assist the City in drafting any necessary plan amendments and assist with submissions of written reports and other documents required by state and federal law.**

Gehring Group/Risk Strategies proactively assists our clients with ensuring all plan documentation is compliant and submitting required reports or other required documentation as required by state and federal law. Our approach includes education, assistance with documentation, on-site meetings with committees and management, compliance checklists, intermittent reminders, and proactive follow-up regarding compliance by our consulting staff.

- C. The City requires, when requested, that the service provider participates in communications and meets with insurance and healthcare carriers. Travel and meeting time will not be compensated by the City.**

Acknowledged. Your Gehring Group/Risk Strategies' team members are available as requested to attend any onsite meetings with carriers and vendors as well as City Commission meetings or other meetings. We are also available by phone, email, or virtual/video call (Zoom, Teams, etc.). Due to the large number of public sector clients we service throughout the state of Florida and in the central Florida area, we are available to meet in person given reasonable notice. It is also important to note that Gehring Group/Risk Strategies does not limit the number of in-person meetings or pass through any associated travel costs.

- D. The provider shall serve as liaison between the City and all benefit vendors, including customer service and assistance in resolving claims and billing issues.**

Your Gehring Group/Risk Strategies team will play a crucial role in engaging with all employee benefits carriers and serving as the liaison between the City and its vendors. We represent your best interests in negotiating, coordinating, implementing, and monitoring all aspects of plan benefits and services. We consistently review carrier performance and collaborate with claims departments to ensure accurate claims processing. Additionally, we negotiate performance guarantees with vendors concerning implementation, ongoing member service criteria, and provider discounts. Consider your Gehring Group/Risk Strategies team as an extension of your HR and Benefits staff. Supporting our clients' needs is a core objective. We take advocacy to heart, representing your employees on claims issues and advocating for your organization during renewals and vendor communications.

- E. The selected service provider shall be responsible for maintaining the confidentiality of the City's records and data, which cannot be sold, shared, or otherwise disclosed to other companies or individuals without written permission from the City manager.**

Acknowledged. Our organization has established policies and procedures to ensure the confidentiality, integrity, and availability of information and systems. These cover hardware/software purchasing, anti-virus/anti-spam systems, data management, network security, and access controls. We are HIPAA compliant, maintain business associate agreements, and adhere to best practices for PHI and PII transmission. Security techniques include VPNs, secure FTP, PGP encryption, and encrypted email.

HIPAA compliance is central to our processes, starting with Business Associate Agreements and secure email for sensitive data. We conduct annual HIPAA risk assessments via a third-party authorized HITRUST CSF Assessor and provide regular employee training on data privacy, security, and ethics. Our comprehensive compliance program ensures stable and secure services for customers..

- F. The service provider shall assist the City with developing benefit vendor performance guarantees to evaluate the services being provided on a continual basis.**

Gehring Group/Risk Strategies works closely with our clients and their vendors to negotiate performance guarantees, placing criteria around customer service, response times, timely claim handling, network discounts along with key areas of importance to each client's needs. As these are typically centered around implementation and annual service, we are proficient in tracking assessment periods and independent evaluation and review of carriers' ability to meet the required metrics along with assisting our clients in recovery of any payments should one or more not be meet.

- G. Evaluation of, processing of, reporting and compliance with HIPAA and with COBRA and retiree benefit administration is required of the selected service provider.**

As stated above, HIPAA compliance is at the core of our processes and systems engineering. We prioritize the protection of sensitive health information and ensure that all our operations adhere to HIPAA regulations. In addition, we provide comprehensive support to our clients in navigating COBRA requirements and dealing with the applicable COBRA vendor. Lastly, our services also include providing guidance relating to compliance with Florida Statute 112.08 as it relates to retiree benefits and rules regarding those lines of coverage which retirees are allowed to continue beyond employment termination.

Our commitment to compliance is unwavering, and we continuously monitor regulatory changes to keep our clients informed and compliant. By leveraging our expertise and proactive approach, we help our clients manage their benefits programs effectively and ensure adherence to all relevant laws and regulations.

3) Reporting and Documentation

- A. The provider shall maintain records of the plans, financial and claims experience, and provide quarterly progress reports to continually evaluate the effectiveness of the plan.**

Your Gehring Group analytical team obtains all available claims utilization reports regarding the City's medical and pharmacy claims on a regular basis. We compare historical claims data to identify trends such as overutilization and other cost outliers to identify cost drivers and utilization issues to better drive decisions regarding plan design options and identify cost saving opportunities. Our concise and comprehensive plan performance reports that provide decision makers with the knowledge necessary to make informed program recommendations and decisions (samples included in **Exhibit 3: Sample Reports & Work Product**). Additional information regarding Gehring Group/Risk Strategies reporting and documentation capabilities are included in **Tab E, question 6**.

- B. The provider shall assist in drafting, editing, printing, and production of employee benefit materials.**

Confirmed. Please refer to **Tab E, question 3** for detailed information on Gehring Group/Risk Strategies' employee education and communication services.

- C. It is required by the City that compensation for all services provided under the resulting contract shall be in the form of commission from carriers/vendors. Compensation will be based on the negotiated commission paid by each carrier for the respective lines of coverage. NO additional costs or fees will be paid by the City. The selected service provider will supply the City with an annual statement, from each carrier, giving full disclosure of all compensation earned. Annual disclosure of all direct or indirect earnings will be required as well.**

Acknowledged.

-
- **Has or is your company currently involved in any formal court proceedings regarding any of your contracts? If so, provide an explanation and status.**

No.

- **Include any other information that demonstrates your company may be the most qualified and in the best interest of the City to select. Photographs/charts/graphs are optional and may be provided in this section.**

Exhibits are included in **Tab I** for your review.

Tab G:

References

Include Attachment A2, Illustrative Work Form and any other information pertaining to the minimum of three (3) references for work performed that is similar to the scope of services for this RFP. Include references that are able to comment on your organization's relevant experience.

Please see completed forms Attachment A2, Illustrated Work Form on the following pages.

- 1. From your references' perspective, what makes your organization unique from other organizations that may submit proposals for the City of Wildwood's consideration? References must be for current, or recent projects, and must be for the proposed project team members. Ensure that Submittal Attachment 2 (Illustrative work) has the company/city name, contract name, phone number and address are included.**

Please refer to **Tab C, question 4** for details regarding Gehring Group/Risk Strategies' competitive advantages. We have also included additional Letters of Recommendation from current Gehring Group/Risk Strategies clients attached hereto as **Exhibit 6**. Serving Florida public sector entities for over 30 years, our team has accumulated a vast amount of work experience relevant to what is necessary to serve the needs of the City.

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> Employee Benefits Brokerage Services / Brooksville, FL <u>Project Manager:</u> Athena Erchard		Client's Name & Address City of Brooksville 201 Howell Avenue Brooksville, FL 34601
Completion Date (Actual or Estimated): Client since: 10/1/2007 Contract ongoing		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Kyle Martin, HR & Risk Mgmt. Director kmartin@cityofbrooksville.us 352-540-3810
<u>Contractor Fees (In Thousands)</u> Entire Project: Work for which "VENDOR" was/is responsible: \$ Commissions \$ N/A		
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Gehring Group/Risk Strategies provides comprehensive employee benefits consulting services to the City (150 employees) including RFP & evaluation, open enrollment coordination and attendance, claims analysis and budget projections, provision of an Online Enrollment System, development of annual employee benefits highlights and other communications, wellness program consulting, actuarial services, employee advocacy and claims resolution, and additional services as needed.		
<u>Nature of VENDOR's Responsibility in Project</u> (Please give quantitative indications wherever possible) Gehring Group/Risk Strategies is Broker of Record for all lines of employee benefits coverage.		
<u>VENDOR's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the CITY's Project</u> Lead Consultant - Athena Erchard Account Manager - Jennifer Winter Account Relations Manager - Jessica Smith Client Service Specialist - Amber Aronson		

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> Employee Benefits Consultant Services / Cape Coral, FL <u>Project Manager:</u> Athena Erchard		Client's Name & Address City of Cape Coral 1015 Cultural Park Boulevard Cape Coral, Florida 33990
Completion Date (Actual or Estimated): Client Since: 10/3/2011 Contract ongoing		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Deana Watson, Benefits Coordinator dwatson@capecoral.gov 239-574-0531
<u>Contractor Fees (In Thousands)</u> Entire Project:	Work for which "VENDOR" was/is responsible: \$ N/A	
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Gehring Group/Risk Strategies provides comprehensive employee benefits consulting services for the City and its Charter School (total 1,600 employees) including RFP & evaluation, open enrollment coordination and attendance, claims analysis and budget projections, employee health center (clinic) oversight, provision of an Online Enrollment System, development of annual employee benefits highlights and other communications, wellness program consulting, actuarial services, employee advocacy and claims resolution, and additional services as needed.		
<u>Nature of VENDOR's Responsibility in Project</u> (Please give quantitative indications wherever possible) Gehring Group/Risk Strategies is Broker of Record for all lines of employee benefits coverage.		
<u>VENDOR's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the CITY's Project</u> Lead Consultant - Athena Erchard Account Manager - Jennifer Winter		

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> Employee Benefits Broker Services / Kissimmee, FL		<u>Client's Name & Address</u> Osceola County Sheriff's Office 2601 E Irlo Bronson Memorial Highway Kissimmee, Florida 34744	
<u>Project Manager:</u> Christian Bergstrom / Barbara Houghtaling		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Shannon Stevens, Human Resources Mgr. shannon.stevens@osceolasheriff.org 407-348-1130	
<u>Completion Date (Actual or Estimated):</u> Contract ongoing			
<u>Contractor Fees (In Thousands)</u>		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Shannon Stevens, Human Resources Mgr. shannon.stevens@osceolasheriff.org 407-348-1130	
<u>Entire Project:</u> \$ Annual Flat Fee	<u>Work for which "VENDOR" was/is responsible:</u> \$ N/A		
<u>Scope of Entire Project (Please give quantitative indications wherever possible)</u> Gehring Group/Risk Strategies provides comprehensive employee benefits consulting services for the Sheriff's office (600 employees) including RFP & evaluation, open enrollment coordination and attendance, claims analysis and budget projections, provision of an Online Enrollment System, development of annual employee benefits highlights and other communications, wellness program consulting, actuarial services, employee advocacy and claims resolution, and additional services as needed.			
<u>Nature of VENDOR's Responsibility in Project (Please give quantitative indications wherever possible)</u> Gehring Group/Risk Strategies is Broker of Record for all lines of employee benefits coverage.			
<u>VENDOR's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the CITY's Project</u> Consultant & Account Manager - Barbara Houghtaling Employee Benefits Analyst - Christine Turnquest Account Relations Manager - Jessica Smith			

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> Employee Benefits Brokerage Services / Wellington, FL <u>Project Manager:</u> Christian Bergstrom / Barbara Houghtaling		Client's Name & Address Village of Wellington 12300 Forest Hill Blvd. Wellington, Florida 33414
Completion Date (Actual or Estimated): Contract ongoing Client Since: 3/23/2000		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Kimberly Gibbons, HR Director kgibbons@wellingtonfl.gov 561-791-4063
<u>Contractor Fees (In Thousands)</u> Entire Project: \$ Commissions Work for which "VENDOR" was/is responsible: \$ N/A		
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Gehring Group/Risk Strategies provides comprehensive employee benefits consulting services for the Village (350 employees) including RFP & evaluation, open enrollment coordination and attendance, claims analysis and budget projections, provision of an Online Enrollment System, onsite clinic consulting, development of annual employee benefits highlights and other communications, wellness program consulting, employee advocacy and claims resolution, and additional services as needed.		
<u>Nature of VENDOR's Responsibility in Project</u> (Please give quantitative indications wherever possible) Gehring Group/Risk Strategies is Broker of Record for all lines of employee benefits coverage.		
<u>VENDOR's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the CITY's Project</u> Consulting / Account Manager - Barbara Houghtaling Employee Benefits Analyst - Christine Turnquest		

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> Employee Benefits Brokerage Services / Greenacres, FL <u>Project Manager:</u> Barbara Houghtaling		<u>Client's Name & Address</u> City of Greenacres 5800 Melaleuca Lane Greenacres, Florida 33463			
<u>Completion Date (Actual or Estimated):</u> Contract ongoing <u>Client Since:</u> 5/9/2019		<u>Client Contact Name, Title, Email Address and Telephone Number:</u> Suzanne Skidmore, Human Resource Dir. sskidmore@greenacresfl.gov 561-642-2001			
<u>Contractor Fees (In Thousands)</u> <table style="width: 100%; border: none;"> <tr> <td style="width: 30%; border: none;"><u>Entire Project:</u></td> <td style="border: none;">Work for which "VENDOR" was/is responsible:</td> </tr> <tr> <td style="border: none;">\$ Commissions</td> <td style="border: none;">\$ N/A</td> </tr> </table>			<u>Entire Project:</u>	Work for which "VENDOR" was/is responsible:	\$ Commissions
<u>Entire Project:</u>	Work for which "VENDOR" was/is responsible:				
\$ Commissions	\$ N/A				
<u>Scope of Entire Project</u> (Please give quantitative indications wherever possible) Gehring Group/Risk Strategies provides comprehensive employee benefits consulting services for the City (135 employees) including RFP & evaluation, open enrollment coordination and attendance, claims analysis and budget projections, provision of an Online Enrollment System, onsite clinic consulting, development of annual employee benefits highlights and other communications, wellness program consulting, employee advocacy and claims resolution, and additional services as needed.					
<u>Nature of VENDOR's Responsibility in Project</u> (Please give quantitative indications wherever possible) Gehring Group/Risk Strategies is Broker of Record for all lines of employee benefits coverage.					
<u>VENDOR's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the CITY's Project</u> Benefits Consultant/Account Manager - Barbara Houghtaling Employee Benefits Analyst - Christine Turnquest					

Tab H:

Submittal Documents Required

As specified in Part 1 of this RFP and listed within the Proposal Documents Checklist of Items Required to be submitted are the forms to be completed and returned.

- Proposer's Certification (Attachment H1)
- Proposal Form (Attachment H2)
- Statement of Terms & Conditions (Attachment H3)
- Hold Harmless Agreement (Attachment H4)
- Drug Free Workplace Certificate (Attachment H5)
- Sworn Statement on Public Entity Crimes (Attachment H6)
- Conflict of Interest Disclosure Form (Attachment H7)
- Immigration Affidavit Certification (Attachment H8)
- State of Florida Sunbiz Annual Report
- Sample Certificates of Insurance
- Requested Exceptions/Deviations to Sample Agreement

PROPOSALS FORM FOR CITY OF WILDWOOD



Name of Vendor Submitting Proposals RSC Insurance Brokerage, Inc.

Name of Person Submitting Proposals Kurt N. Gehring, Managing Director

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."

RSC Insurance Brokerage, Inc.

Kurt N. Gehring
Signature

March 13, 2025
Date

2025-07 - Benefits Consulting & Broker Services
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.

EXCEPTIONS/DEVIATIONS TO SAMPLE PROFESSIONAL SERVICES AGREEMENT

The Proposer, RSC Insurance Brokerage, Inc. lists its deviations/exceptions to the City's Sample Professional Services Agreement as follows:

1. Proposer respectfully requests that any and all references in the sample agreement to "Holiday Lighting and Decorations" and "asphalt surface treatment" be updated with "Benefits Consulting & Broker Services".
2. Proposer respectfully requests that Section 9 (f.) "Services hourly rates as attached to this contract" be deleted because hourly rates are not relevant to this particular contract (the awarded proposer will be compensated by commissions per Addendum #1).
3. Proposer respectfully requests that Paragraph 7 (a.) be replaced with the following language:

"All reports, drawings, designs, specifications, notebooks, computations, details, and calculation documents prepared by Contractor and presented to the City pursuant to this Agreement are and remain **licensed to** the City as instruments of service. 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, **except for information that is confidential or exempt or a trade secret.**"

Statement of Terms and Conditions

[Submittal Attachment H3]

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 (BID) must be submitted in writing to the "CITY" 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. "VENDOR" 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 "CITY" 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 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/Bids 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: "VENDOR" s 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 "VENDOR"s 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 "VENDOR" s 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. "VENDOR" s or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.

"CITY" SHIP 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 "VENDOR" s 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 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: "VENDOR" s are fully and completely responsible for the labeling, identification and delivery of their submittals. The "CITY" 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 "VENDOR" s 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 with 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 Piggybacks 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 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/Bids 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 "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.

ACKNOWLEDGED: RSC Insurance Brokerage, Inc.


(Signature and Date)

Kurt N. Gehring, Managing Director | March 13, 2025

This document must be completed and returned with your Submittal.

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.

The 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.

RSC Insurance Brokerage, Inc.

Contractor/ Vendor-Print Name


Signature Kurt N. Gehring, Managing Director

RFP No. 2025-07 | Benefits Consulting &
Broker Services

Project Name

March 13, 2025

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,

RSC Insurance Brokerage, Inc.

(print or type name of vendor)

- a. 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.
- b. Informs employees about the dangers of drug abuse in the workplace, 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.
- c. Gives each employee engaged in providing commodities or contractual services that are under RFP or bid, a copy of the statement specified above.
- d. 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.
- e. 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.
- f. Make a good faith effort to continue to maintain a drug free workplace through the implementation of the drug free workplace program.
- g. "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 Kurt N. Gehring, Managing Director

March 13, 2025

Date Signed

State of: Florida

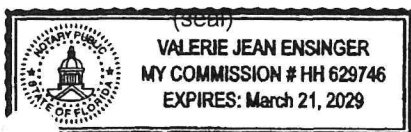
County of: Palm Beach

Sworn to and subscribed before me this 13th day of March, 2025

Personally known X or Produced Identification personally known
(Specify Type of Identification)


Signature of Notary

Valerie Jean Ensinger
My Commission Expires March 21, 2029



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 Kurt N. Gehring, Managing Director

{print individual's name and title}

for RSC Insurance Brokerage, Inc.

{print name of entity submitting sworn statement}

whose business address is 3500 Kyoto Gardens Drive, Palm Beach Gardens, FL 33410

and (if applicable) its Federal Employer Identification Number (FEIN) is 16-1689464 (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}
Kurt N. Gehring
March 13, 2025

{date}

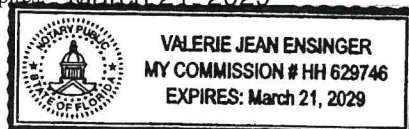
State of Florida

County of Palm Beach

PERSONALLY APPEARED BEFORE ME, the undersigned authority, Kurt N. Gehring, who after first being sworn by me, affixed his/her signature in the space provided above on this 13th day of March, 20 .

Attest: 
Notary Public Valerie Jean Ensinger
My commission expires: March 21, 2029

(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) Kurt N. Gehring am the
(title) Managing Director and the duly authorized representative of the vendor of (Vendor
Name) RSC Insurance Brokerage, Inc. whose address is
3500 Kyoto Gardens Drive, Palm Beach Gardens, FL 33410
, 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: Kurt N. Gehring, Managing Director

Vendor Name: RSC Insurance Brokerage, Inc.

Date: March 13, 2025

State of Florida

County of Palm Beach

Sworn to and subscribed before me this 13th day of March, 2025

Personally Known X
OR Produced Identification n/a, Type of Identification personally known

My Commission Expires March 21, 2028


(Printed, typed, or stamped commissioned name of notary)
Valerie Jean Ensinger



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: RSC Insurance Brokerage, Inc.

Print Name: Kurt N. Gehring Title: Managing Director

Signature: [Signature] Date: _____

State of Florida County of Palm Beach

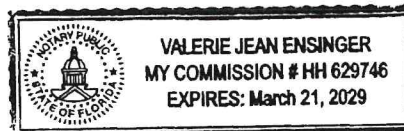
The foregoing instrument was signed and acknowledged before me this 13th day of March, 2029, by

Kurt N. Gehring who has produced _____ personally known identification. (Print or Type Name) (Type of Identification and Number)

[Signature]
Notary Public Signature

Valerie Jean Ensinger
Printed Name of Notary Public

HH 629746 | March 21, 2029
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.

2025 FOREIGN PROFIT CORPORATION ANNUAL REPORT

DOCUMENT# F08000001322

Entity Name: RSC INSURANCE BROKERAGE, INC

Current Principal Place of Business:

160 FEDERAL ST
BOSTON, MA 02110

Current Mailing Address:

160 FEDERAL ST
BOSTON, MA 02110 US

FEI Number: 16-1689464

Certificate of Status Desired: No

Name and Address of Current Registered Agent:

CORPORATION SERVICE COMPANY
1201 HAYS STREET
TALLAHASSEE, FL 32301 US

The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.

SIGNATURE:

Electronic Signature of Registered Agent

Date

Officer/Director Detail :

Title DIRECTOR, SECRETARY,
TREASURER
Name EDWARDS, SHARON
Address 160 FEDERAL ST
City-State-Zip: BOSTON MA 02110

Title PRESIDENT, DIRECTOR
Name MINA, JOHN
Address 160 FEDERAL ST 4TH FLOOR
City-State-Zip: BOSTON MA 02110

I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.

SIGNATURE: SHARON EDWARDS

SECRETARY

01/22/2025

Electronic Signature of Signing Officer/Director Detail

Date



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

05/21/2024

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 RSC Insurance Brokerage, Inc. 160 Federal St. 4th Floor Boston MA 02110	CONTACT NAME: Risk Strategies Company PHONE (A/C, No, Ext): (617) 330-5700 FAX (A/C, No): (617) 439-3752 E-MAIL ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A: National Fire Insurance Company of Hartford INSURER B: Continental Insurance Co INSURER C: American Casualty Co of Reading PA INSURER D: INSURER E: INSURER F:
INSURED RSC Insurance Brokerage, Inc., and its division Gehring Group 160 Federal Street, 4th Floor Boston MA 02110	NAIC # 20478 35289 20427

COVERAGES**CERTIFICATE NUMBER:** CL2452153197**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:			PMT7033916806	05/20/2024	05/20/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY			BUA7033916773	05/20/2024	05/20/2025	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 \$			CUE7033916756	05/20/2024	05/20/2025	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
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/A	WC7033916787	05/20/2024	05/20/2025	☒ PER STATUTE ☐ OTHER 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)

Additional Insured coverage may be available where required by contract or agreement. Primary and non-contributory coverage may be available where required by contract or agreement. Waiver of Rights of Recovery Against Others coverage may be available where required by contract or agreement. Notice of Cancellation may be available where required by contract or agreement.

All coverages are as per policy provisions, per contract or agreement, as interests may appear.

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



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

09/27/2024

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 RSC Insurance Brokerage, Inc. 160 Federal St. 4th Floor Boston MA 02110	CONTACT NAME: Bryan Lorenz PHONE (A/C, No, Ext): (617) 330-5700 FAX (A/C, No): (617) 439-3752 E-MAIL ADDRESS: blorenz@risk-strategies.com														
INSURED The Gehring Group, Inc., a division of RSC Insurance Brokerage, Inc. 160 Federal Street, 4th Floor Boston MA 02110	<table><tr><th>INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr><tr><td>INSURER A: XL Specialty Insurance Co</td><td>37885</td></tr><tr><td>INSURER B:</td><td></td></tr><tr><td>INSURER C:</td><td></td></tr><tr><td>INSURER D:</td><td></td></tr><tr><td>INSURER E:</td><td></td></tr><tr><td>INSURER F:</td><td></td></tr></table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: XL Specialty Insurance Co	37885	INSURER B:		INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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INSURER B:															
INSURER C:															
INSURER D:															
INSURER E:															
INSURER F:															

COVERAGES**CERTIFICATE NUMBER:** CL2492792732**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						EACH OCCURRENCE \$
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence) \$
							MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$
	☐ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG \$
	OTHER:						\$
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident) \$
	☐ ANY AUTO						BODILY INJURY (Per person) \$
	☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS						BODILY INJURY (Per accident) \$
	☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident) \$
							\$
	UMBRELLA LIAB						EACH OCCURRENCE \$
	EXCESS LIAB						AGGREGATE \$
	☐ DED ☐ RETENTION \$						\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						☐ PER STATUTE ☐ OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	☐ Y ☐ N	N/A				E.L. EACH ACCIDENT \$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
	Errors & Omissions			ELU199846-24	09/30/2024	09/30/2025	Per Claim \$5,000,000 Aggregate \$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Issued as evidence of insurance.

CERTIFICATE HOLDER**CANCELLATION**

Evidence of Coverage	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE

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REQUESTED EXCEPTIONS/DEVIATIONS TO SAMPLE PROFESSIONAL SERVICES AGREEMENT

The Proposer, RSC Insurance Brokerage, Inc. lists its deviations/exceptions to the City's Sample Professional Services Agreement as follows:

1. Proposer respectfully requests that any and all references in the sample agreement to "Holiday Lighting and Decorations" and "asphalt surface treatment" be updated with "Benefits Consulting & Broker Services".
2. Proposer respectfully requests that Section 9 (f.) "Services hourly rates as attached to this contract" be deleted because hourly rates are not relevant to this particular contract (the awarded proposer will be compensated by commissions per Addendum #1).
3. Proposer respectfully requests that Paragraph 7 (a.) be replaced with the following language:

"All reports, drawings, designs, specifications, notebooks, computations, details, and calculation documents prepared by Contractor and presented to the City pursuant to this Agreement are and remain **licensed to** the City as instruments of service. 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, **except for information that is confidential or exempt or a trade secret.**"

Exhibit 1 Sample Employee Benefit Guide

Exhibit 2 Sample Employee Communications

Exhibit 3 Sample Reports & Work Product

Exhibit 4 Sample Client Webinar

Exhibit 5 Sample Employee Benefit Newsletters

Exhibit 6 Client Letters of Recommendation

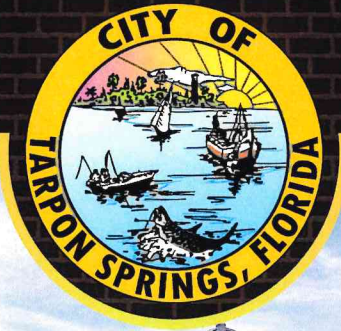
Please note that all communications herein
can be printed on various paper sizes.



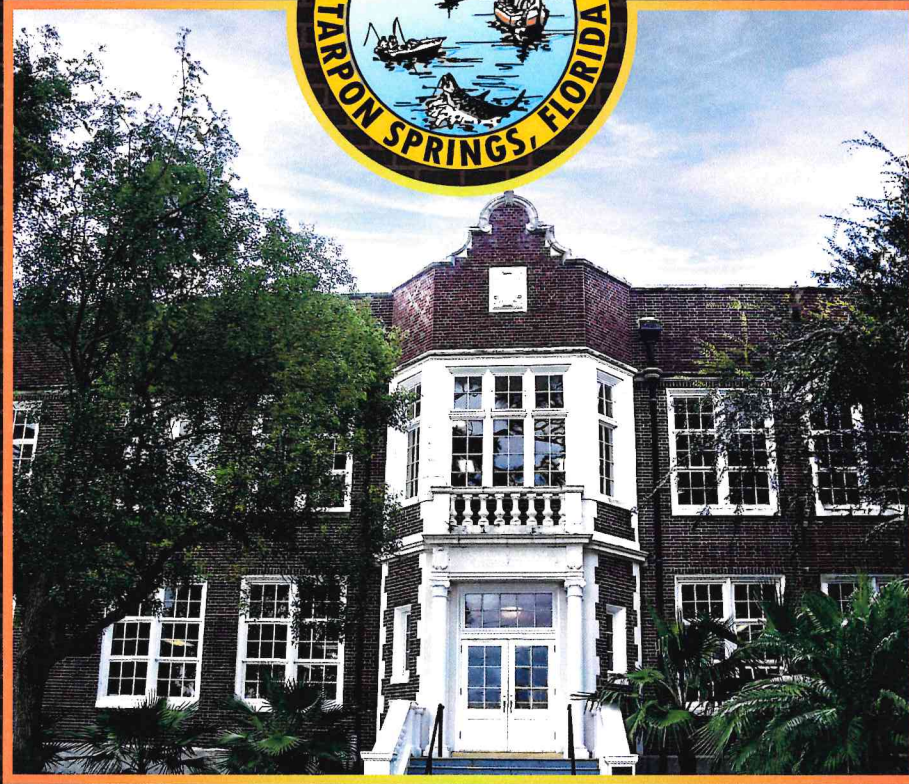
Date	February 28th
Time	11am to 2pm
Location	Jerome Brown Center 99 Jerome Brown Place Brooksville, FL 34601

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2024



2025



OPEN ENROLLMENT

September 4th - September 13th

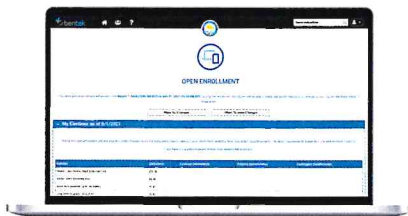
Open Enrollment is the time of year that you can make changes to your benefits, add or drop dependents, change plans, enroll into coverage, or drop coverage.

Open Enrollment informational sessions will be held to review available benefit options and premium information. You will also be able to meet with benefits representatives and ask questions.

Date	Time	Location
Thursday, September 5th	7:00am - 12:00pm	Public Safety Facility 2nd Floor Conference Room
Monday, September 9th	1:00pm - 4:00pm	City Hall 2nd Floor Conference Room
Wednesday, September 11th	7:00am - 12:00pm	City Hall 2nd Floor Conference Room

ONLINE ENROLLMENT THROUGH BENTEK

IMPORTANT All Employees are encouraged to login to Bentek to confirm their benefits for the 2024-2025 plan year.



EMPLOYEES MAY:

- ✓ View all benefit elections and payroll deductions
- ✓ View plan summaries
- ✓ Designate Life Insurance beneficiaries
- ✓ During open enrollment, employees may make new elections, change, add or remove dependents

To access the site, visit www.mybentek.com/ctsfl

All employees are encouraged to log on to Bentek during the Open Enrollment period (September 4th - September 13th) to verify coverage and update beneficiaries for the 2024-2025 Plan Year. Bentek Online Assistance will also be available during the dates and times listed.

To access Bentek
using a mobile
device, scan code.



Bentek support is available Monday through Friday, 8:30 am - 5:00pm.

Bentek Support Line: (888) 5-Bentek (523-6835)

Open Enrollment closes promptly at 5:00pm on September 13th, 2024
If you have questions, please contact the Human Resources Department.



2023 OPEN ENROLLMENT

Thursday, September 22nd - Friday, October 14th

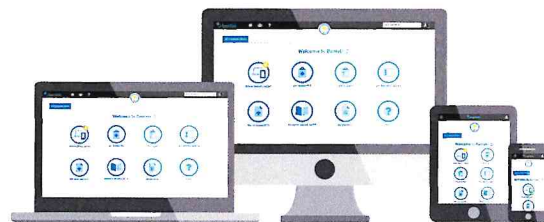
Open Enrollment is the time of year when benefit eligible employees can make new benefit elections, or changes to their current elections, for the upcoming 2023 plan year.

There are no carrier changes this year, but it is important that everyone logs into BenteK to review their benefits and make any plan changes. Reminder: If you are in the FSA plan, you must re-enroll each year.

ONLINE ENROLLMENT THROUGH BENTEK

Open Enrollment is online! BenteK is our internet-based benefits-enrollment system, allowing you to do the following 24 hours-a-day/7 days-a-week during the Open Enrollment period:

- View all benefit elections and payroll deductions
- Make new elections or changes online
- View plan summaries and link to provider websites
- Designate life insurance beneficiaries



To access the site go to: **www.mybentek.com/clearwater**

BenteK Site will be open from Thursday, September 22nd - Friday, October 14th at 5:00pm.

If you have trouble accessing BenteK, please contact the BenteK Support Line at: support@mybentek.com, or: (888) 5-BenteK (523-6835) Monday - Friday 8:30am - 5:00pm EST

Questions or concerns? Please contact Human Resources at (727) 562-4870

To access BenteK using a mobile device, scan code.



2024 OPEN ENROLLMENT!

November 9th through November 30th



Open Enrollment is the time of year that you can make changes to your benefits, add or drop dependents, change plans, enroll into coverage or drop coverage. All new elections and changes made during Open Enrollment will be effective on January 1, 2024. Please attend an Open Enrollment informational session to learn more about your benefits.

WHAT'S HAPPENING?

- CHANGES to Medical Insurance
 - » Adding Teladoc for PCP, Dermatology and Mental Health Visits
 - » NO Rate Changes
- NO CHANGES to dental, vision, life or disability
- **NEW!** EAP is changing from New Directions to ESI
 - » Six face-to-face & unlimited telephonic visits
 - » Dedicated public safety phone line
- **NEW!** Flexible Spending Accounts (FSA) are changing from Health Equity to P&A Group
 - » Medical FSA includes option to rollover annual IRS limit amount

ENROLLMENT IS EASY!

Open Enrollment is online. The City provides Bentek, an internet based online benefits enrollment system, available 24 hours a day, 7 days a week. Employees may:

- View all benefit elections and payroll deductions
- Make new elections, change, add or remove dependents
- View plan summaries and link to carrier websites
- Designate Life Insurance beneficiaries
- Enroll in Flexible Spending Accounts (FSA)



Scan Here!

All elections will be effective January 1, 2024

Enroll online November 9 - November 30

www.mybentek.com/cityofcapecoral



THURSDAY NOVEMBER 9TH

In-Person at City Hall
Council Chambers

8:00am - 9:30am

10:00am - 11:30am

1:00pm - 2:30pm

3:00pm - 4:30pm

THURSDAY NOVEMBER 16TH

Virtual Teams Meeting
(Link available from
HR Department)

10:00am - 11:30am



OPEN ENROLLMENT

SEPTEMBER 4TH - SEPTEMBER 15TH

The Pinellas Suncoast Fire & Rescue District Group Insurance Plan Year Begins October 1, 2023. Open Enrollment is the time when benefit eligible employees can make new benefit elections, or changes to their current elections, for the upcoming 2023-2024 plan year.

All new elections or changes made during Open Enrollment will be effective October 1, 2023.

***Please be on the lookout for a virtual
Open Enrollment presentation!***

If you would like to make any changes or have any questions, please reach out to Kimberly Hampton at (727) 595-1117 ext. 100.

2023-2024



OPEN ENROLLMENT IS HERE!

Virtual Info Sessions Available!

Gehring Group, FL Blue and your other benefit providers will be presenting live on all your benefits for the 2023-2024 plan year. These sessions will be held through Microsoft Teams and are designed to help you prepare for Open Enrollment. Attendance is recommended for all full-time employees.

Please see schedule to the right for the educational sessions. Click on Join Teams Meeting from computer or mobile device to join; or join by phone.



To access Bentek using a mobile device, scan code.

DATE	TIME	MEETING PLATFORM
Tuesday August 8	10:00 a.m. - 11:30 a.m.	Join Microsoft Teams meeting Call in number: +1 850-583-5114 Conference ID: 569 813 571#
	7:00 p.m. - 8:30 p.m.	Join Microsoft Teams meeting Call in number: +1 850-583-5114 Conference ID: 466 251 00#
Thursday August 10	10:00 a.m. - 11:30 a.m.	Join Microsoft Teams meeting Call in number: +1 850-583-5114 Conference ID: 470 386 740#
	2:00 p.m. - 3:30 p.m.	Join Microsoft Teams meeting Call in number: +1 850-583-5114 Conference ID: 194 233 836#
Tuesday August 15	10:00 a.m. - 11:30 a.m.	Join Microsoft Teams meeting Call in number: +1 850-583-5114 Conference ID: 661 297 742#
	2:00 p.m. - 3:30 p.m.	Join Microsoft Teams meeting Call in number: +1 850-583-5114 Conference ID: 290 502 379
Thursday August 17	10:00 a.m. - 11:30 a.m.	Join Microsoft Teams meeting Call in number: +1 850-583-5114 Conference ID: 553 954 38#
	7:00 p.m. - 8:30 p.m.	Join Microsoft Teams meeting Call in number: +1 850-583-5114 Conference ID: 553 066 203#



HRA WELLNESS FUNDING

The City provides a Health Reimbursement Account (HRA) to employees who participate in the Cigna High Deductible Health Plan. HRA monies are not taxable and funded by the City and can be used for any qualified medical expenses such as copayments, deductibles and coinsurance for physician services, hospital services, prescription drugs, etc. The HRA monies provide tax-free funds to cover qualified out-of-pocket expenses incurred under the medical plan. Deadline to complete Health Assessments is September 30, 2023. A new hire's deadline is the 90th day following initial benefits eligibility.

HOW TO EARN YOUR ADDITIONAL FUNDS

To receive optional City HRA funding employee must complete the following steps:

- STEP 1** Employee (and/or spouse if applicable) must complete lab testing (bloodwork) with the City's Health Center.
- STEP 2** Upon Completion of the Lab testing the employee (and/or spouse if applicable) must meet with a Health Center provider. Once results are reviewed, please complete Cigna's online Health Assessment (HA) questionnaire.
- STEP 3** The Health Assessment must be completed between March 1, 2023 and September 30, 2023. Sworn Police/Fire Fighters can use the bloodwork results completed during their annual physical between (October 1, 2021 through February 28, 2022) to complete their Health Assessment.



ARE YOU AN EMPLOYEE ONLY?

You need to complete the Health Assessment to earn your funds.

DO YOU HAVE A COVERED SPOUSE/SPOUSE AND CHILDREN ON YOUR PLAN?

Only your spouse needs to complete the Health Assessment to earn their additional portion of funds.

DO YOU ONLY HAVE CHILDREN ON THE PLAN (NO SPOUSE)?

Dependent children of any age do not need to complete their health assessment, you will automatically earn those funds.



WEST PALM BEACH

Wellness HRA Incentive Values

Employee Only \$400

Employee + 1 Dependent \$600
(\$400 Employee, \$200 (Spouse/DP))

Employee + Family \$800
(\$400 Employee, \$400 (Spouse/DP))

All employees will be defaulted into the Base HRA plan. All employees have the option of enrolling in the Buy-Up HRA plan.

Employee may rollover any unused funds year to year, up to a maximum of:

Employee Only \$7,500

Employee + 1 Dependent \$11,250

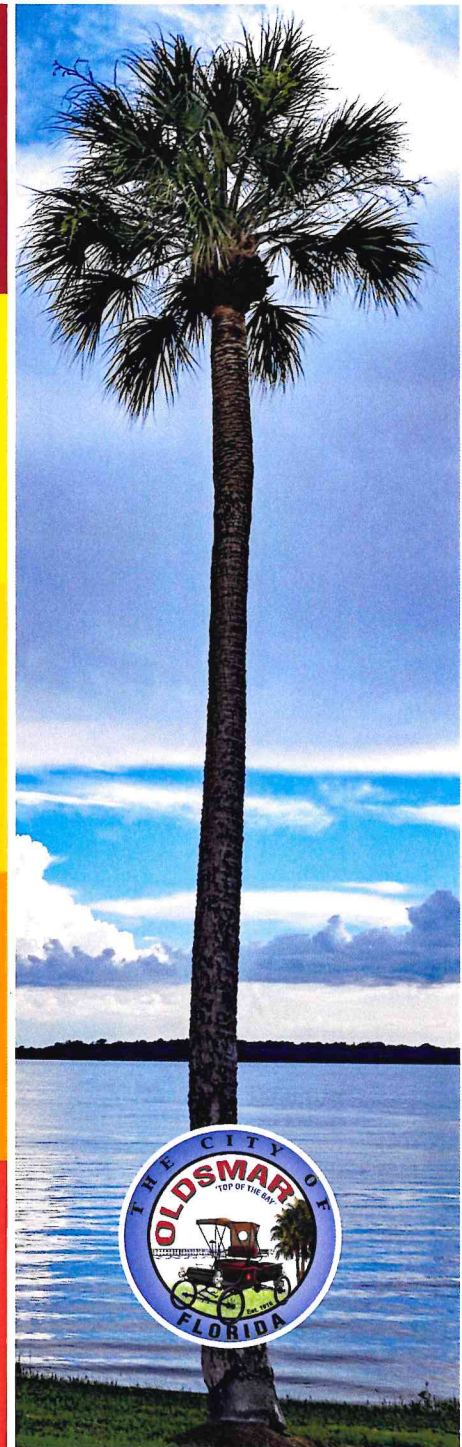
Employee + Family \$15,000

The Wellness Committee
**INVITES YOU TO JOIN US FOR
THE CITY OF OLDSMAR'S**

2023 Employee Health and Wellness Fair!

There will be a variety of vendors at the event.
Enjoy free giveaways, raffle prizes, complimentary
health screenings, and so much more!

- Baycare will be offering screenings: Personal Health Assessments (fasting or non-fasting), skin cancer screening, hearing screening
- Chair Massage
- Body Composition Assessment
- Ergonomics
- Insurance Carriers: Cigna, FMPTF (401a/457b), Gehring Group, Unum LTD, Cigna EAP
- Farkas Chiropractic
- Florida Dept of Health - Tobacco Prevention Program
- Vein Institute of Pinellas
- Tampa General Hospital: Colorectal Cancer Screening Program and Sleep Apnea
- Moffitt Cancer Center



**All employees and any dependents on
the health plans are welcome to attend!**

WHEN:	Wednesday, May 3rd, 2023
WHERE:	Cypress Forest Recreation Center 650 Pine Ave. North, Oldsmar, FL 34677
TIME:	9:00AM - 12:00PM

To sign up for your biometric
screening, skin cancer screening or
hearing test, using a mobile device,
scan code or use the link below.



<https://ha.healthawareservices.com/ra/survey/5097>



We are here to **help you**

Do you have a
question about your
insurance benefits?
Are you receiving
bills from your
provider and not
understanding why?

Citrus County is working with the Gehring Group Team to
provide you with a solution to your questions!

We are excited to announce that the Gehring Group has a
team of claim specialists to assist you with your questions. We
encourage you to email the Gehring Group at:

Email: citrus@gehringgroup.com
Toll Free: (800) 244-3696

Please include the following
information with your email:

- First & Last Name
- Brief Description of
your question
- Your contact information

For your privacy please **do not**
include in your initial email:

- Social Security Number
- Date of Birth
- Member ID



A Gehring Group claim specialist will contact you via a secure
email or telephone call to gather additional information that may
be necessary to further assist you.

Our goal is to ensure that these items are resolved as quickly as
possible.

Gehring Group Analytics Sample Work

Palm Beach Gardens, Florida 33410

(561) 626-6797

(800) 244-3696 / (561) 626-6970 – Fax

www.gehringgroup.com



Sample Plan Comparison

Schedule of Benefits		Current						Option #1					
		Plan 1		Plan		Plan		Plan 1		Plan		Plan	
		In Network	Out of Network	In Network	Out of Network	In Network	Out of Network	In Network	Out of Network	In Network	Out of Network	In Network Only	
Deductible (DED)													
Individual Deductible		\$1,000	\$1,000	\$1,500	\$3,000	\$2,000	\$6,000	\$1,000	\$1,000	\$1,350	\$2,500	\$2,500	
Family Deductible		\$3,000	\$3,000	\$3,000	\$6,000	N/A*	N/A*	\$2,000	\$2,000	\$2,700	\$5,000	\$5,000	
Out of Pocket Maximum													
Single		\$3,000	\$5,000	\$1,500	\$6,000	\$6,350	\$12,800	\$4,000	\$6,000	\$3,750	\$7,500	\$6,000	
Family		\$6,000	\$10,000	\$3,000	\$12,000	\$12,700	\$25,600	\$8,000	\$12,000	\$7,500	\$15,000	\$12,000	
Member Coinsurance		20%	40%	0%	20%	50%	50%	20%	30%	10%	30%	20%	
Non-Hospital Services													
Physician Office Visit Copay		\$20	40% after DED	DED	20% after DED	\$35	50% after DED	\$25	30% after DED	10% after DED	30% after DED	\$20	
Specialist Office Visit Copay		\$35	40% after DED	DED	20% after DED	\$75	50% after DED	\$50	30% after DED	10% after DED	30% after DED	\$40/\$80	
Preventive Services		No charge	40%	No Charge	20%	No Charge	50%	No Charge	Not Available	No Charge	Not Covered	No Charge	
Independent Clinical Lab		No charge	40% after DED	DED	20% after DED	No Charge	50% after DED	No Charge	30% after DED	10% after DED	30% after DED	20% after Ded	
Advanced Imaging (MRI, PET, CT)		\$100	40% after DED	DED	20% after DED	\$200	50% after DED	20% after DED	30% after DED	10% after DED	30% after DED	20% after DED	
Urgent Care Center		\$35	\$35	DED	DED	\$75	\$75	\$35	30% after DED	10% after DED	30% after DED	\$80	
Hospital Services													
Inpatient Hospital Services		\$750	40% after DED	DED	20% after DED	\$2,000	50% after DED	20% after DED	30% after DED	10% after DED	30% after DED	20% after DED	
Outpatient Hospital Services		\$200	40% after DED	DED	20% after DED	\$300	50% after DED	20% after DED	30% after DED	10% after DED	30% after DED	20% after DED	
Physician Services at Hospital		20% after DED	20% after DED	DED	INN DED	50% after DED	50% after INN DED	20% after DED	30% after DED	10% after DED	30% after DED	20% after DED	
Emergency Room (Per Visit)		\$100	\$100	DED	DED	50% after DED	50% after INN DED	\$200	\$200	10% after DED	10% after INN DED	\$250	
Mental Health/Substance Abuse Hospital													
Inpatient Services		\$750	40% after DED	DED	20% after DED	\$2,000	50%	20% after DED	30% after DED	10% after DED	30% after DED	20% after DED	
Outpatient Services		\$35	40% after DED	DED	20% after DED	\$300	50%	\$25	30% after DED	10% after DED	30% after DED	\$20	
Prescription Drugs												Rx Drug DED: \$100/\$200	
Generic Drugs		\$10		DED	INN DED +	\$10		\$10	INN Copays +	\$10		\$10 after DED	
Formulary Drugs		\$25	50%	DED	Difference b/w	\$60	50%	\$35	Difference b/w	\$35	Difference b/w	\$35 after DED	
Non-Formulary Drugs		\$60		DED	INN cost and	\$100		\$60	INN cost and	\$60	OON cost	\$60 after DED	
Mail Order - 90 day supply		2x		DED	OON cost	3x		2.5x	OON cost	2.5x		2.5x	
Rates													
Enrollment**													
Employee Only		225 2 0	\$616.67		\$640.81		\$518.10		\$575.00		\$571.00	\$521.18	
Employee + Spouse		20 0 0	\$1,033.85		\$1,074.33		\$868.57		\$913.77		\$919.04	\$833.71	
Employee + Child(ren)		13 0 0	\$981.67		\$1,020.13		\$824.76		\$856.77		\$862.03	\$782.21	
Employee + Family		11 0 0	\$1,294.59		\$1,345.32		\$1,087.66		\$1,141.78		\$1,075.00	\$1,042.36	
Monthly Premium		269 2 0	\$186,430		\$1,282		\$0		\$171,348		\$1,142	\$0	
Annual Premium			\$2,237,159		\$15,379		\$0		\$2,056,176		\$13,704	\$0	
\$ Increase/(Decrease)			N/A		N/A		N/A		-\$180,984		-\$1,675	\$0	
% Increase/(Decrease)			N/A		N/A		N/A		-8.1%		-10.9%	0.0%	
Total Monthly Premium		271			\$187,712						\$172,490		
Total Annual Premium					\$2,252,539						\$2,069,880		
\$ Increase/(Decrease)					N/A						-\$182,659		
% Increase/(Decrease)					N/A						-8.1%		

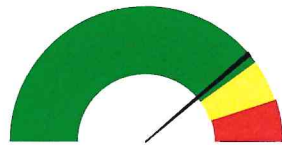
*Family contract members enrolled in the 05901 plan must satisfy a Per Person deductible of \$2,000 in network and \$6,000 out of network.

Sample Client
Medical Claims Report - Fully Insured
Effective Date: October 1, 2023

SAMPLE FULLY INSURED CLAIMS EXPERIENCE REPORT

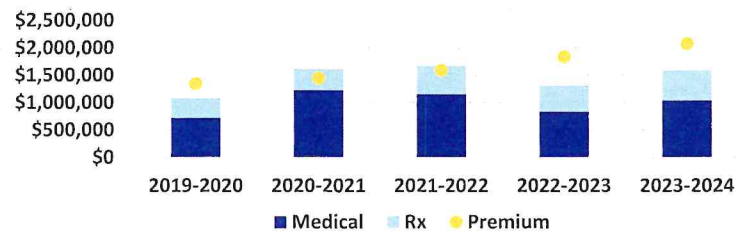
PLAN & CLAIM SUMMARY							
Cigna - Open Access Plus	Monthly Premium	Capitation	In - Network	Out-of-Network	Pharmacy	Total Claims	Loss Ratio
October-23	\$ 161,804	\$ 1,476	\$ 217,016	\$ -	\$ 58,273	\$ 276,765	171%
November-23	\$ 165,374	\$ 1,530	\$ 85,635	\$ 437	\$ 32,522	\$ 120,124	73%
December-23	\$ 168,107	\$ 1,574	\$ (38,732)	\$ -	\$ 27,342	\$ (9,816)	-6%
January-24	\$ 176,731	\$ 1,540	\$ 100,416	\$ -	\$ 30,246	\$ 132,202	75%
February-24	\$ 174,931	\$ 1,590	\$ 43,478	\$ 2,997	\$ 49,349	\$ 97,414	56%
March-24	\$ 176,879	\$ 991	\$ 92,248	\$ -	\$ 38,291	\$ 131,530	74%
April-24	\$ 176,952	\$ 2,574	\$ 59,705	\$ -	\$ 41,420	\$ 103,699	59%
May-24	\$ 177,003	\$ 2,624	\$ 62,807	\$ -	\$ 53,309	\$ 118,740	67%
June-24	\$ 176,547	\$ 1,856	\$ 62,915	\$ 78	\$ 52,241	\$ 117,090	66%
July-24	\$ 173,127	\$ 1,998	\$ 69,919	\$ 47	\$ 43,510	\$ 115,475	67%
August-24	\$ 174,936	\$ 1,083	\$ 116,561	\$ (225)	\$ 54,001	\$ 171,420	98%
September-24	\$ 177,193	\$ 1,823	\$ 146,892	\$ (73)	\$ 74,646	\$ 223,287	126%
2023-2024 TOTAL	\$ 2,079,585	\$ 20,659	\$ 1,018,861	\$ 3,261	\$ 555,151	\$ 1,597,931	77%

ENROLLMENT SUMMARY							
EE	EE + SP	EE + CH	EE + FAM	Total	Claims PEPM	Mbrs	Claims PMPM
112	12	7	12	143	\$ 1,935.42	206	\$ 1,343.52
113	13	7	12	145	\$ 828.44	209	\$ 574.76
116	13	7	12	148	\$ (66.32)	212	\$ (46.30)
115	13	8	16	152	\$ 869.75	235	\$ 562.56
113	13	8	16	150	\$ 649.43	233	\$ 418.09
113	13	8	17	151	\$ 871.06	236	\$ 557.33
113	13	8	17	151	\$ 686.75	236	\$ 439.40
110	13	10	17	150	\$ 791.60	237	\$ 501.01
108	13	11	17	149	\$ 785.84	240	\$ 487.88
109	13	11	17	150	\$ 769.83	242	\$ 477.17
111	13	11	17	152	\$ 1,127.76	244	\$ 702.54
111	12	12	16	151	\$ 1,478.72	242	\$ 922.67
1,344	154	108	186	1,792	\$ 891.70	2,772	\$ 576.45

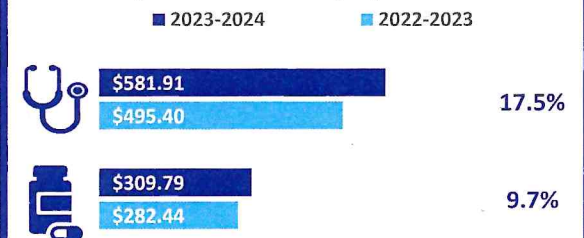


77%
Plan Year Loss Ratio

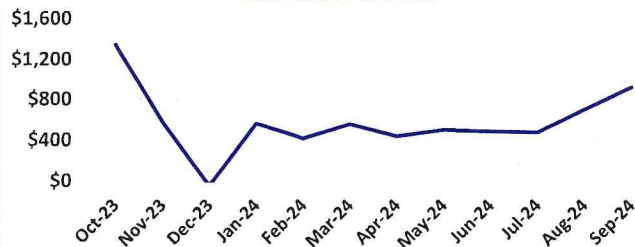
Annual Plan Costs



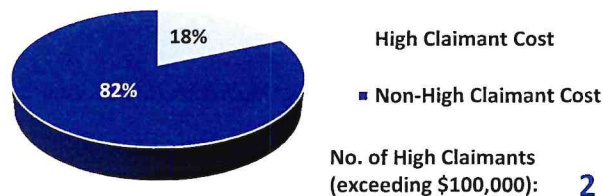
Medical/Rx Claims Per Employee Per Month



Claims Per Member Per Month
2023-2024 Plan Year



High Claimants Cost as a Percentage of Claims
2023-2024 Plan Year



No. of High Claimants
(exceeding \$100,000): 2



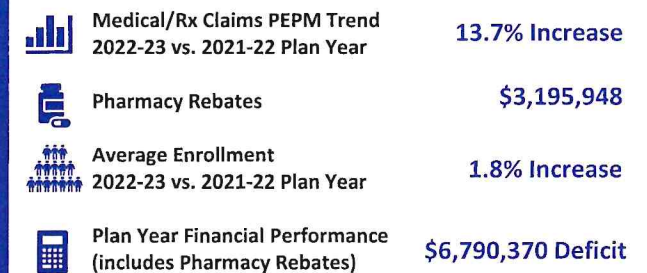
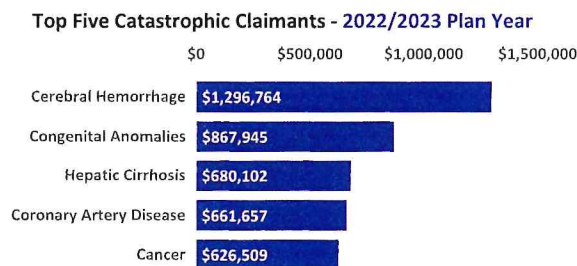
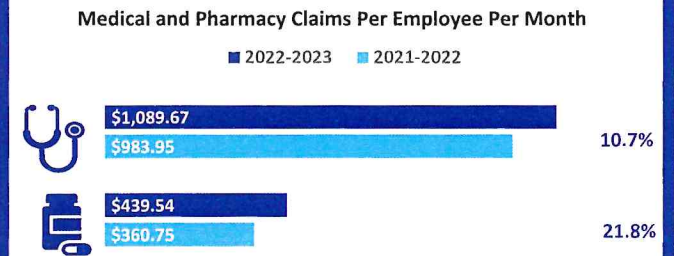
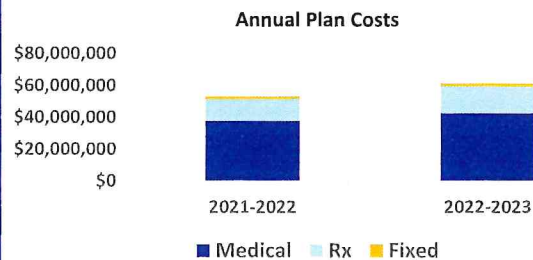
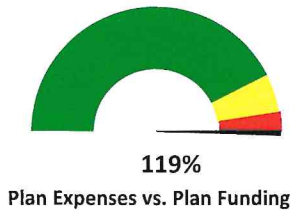
Medical/Rx Claims PEPM Trend
2023-2024 vs. 2022-2023 Plan Year
14.6% Increase



Average Enrollment
2023-2024 vs. 2022-2023 Plan Year
5.9% Increase

2022-2023 Total Plan	Total Funding	Medical Claims	Pharmacy Claims	Total Medical & Rx Claims	Medical Admin Fee	Total Plan Cost	Reserve Accumulation	EE	EE+F	Total	Member	Claims PEPM
October-22	\$ 4,225,607	\$ 3,232,911	\$ 1,223,779	\$ 4,456,690	\$ 138,383	\$ 4,595,073	\$ (369,466)	1,265	1,969	3,234	7,739	\$ 1,378.07
November-22	\$ 4,235,765	\$ 3,432,756	\$ 1,299,230	\$ 4,731,986	\$ 138,725	\$ 4,870,711	\$ (634,946)	1,268	1,974	3,242	7,751	\$ 1,459.59
December-22	\$ 4,245,487	\$ 3,036,250	\$ 1,432,202	\$ 4,468,452	\$ 139,153	\$ 4,607,605	\$ (362,118)	1,277	1,975	3,252	7,749	\$ 1,374.06
January-23	\$ 4,265,216	\$ 2,916,198	\$ 1,238,368	\$ 4,154,566	\$ 139,752	\$ 4,294,318	\$ (29,102)	1,279	1,987	3,266	7,783	\$ 1,272.07
February-23	\$ 4,268,435	\$ 3,869,018	\$ 1,267,817	\$ 5,136,835	\$ 139,966	\$ 5,276,801	\$ (1,008,366)	1,284	1,987	3,271	7,786	\$ 1,570.42
March-23	\$ 4,255,732	\$ 2,939,315	\$ 1,516,242	\$ 4,455,557	\$ 139,453	\$ 4,595,010	\$ (339,278)	1,275	1,984	3,259	7,768	\$ 1,367.15
April-23	\$ 4,267,486	\$ 4,362,918	\$ 1,392,871	\$ 5,755,789	\$ 140,009	\$ 5,895,798	\$ (1,628,312)	1,289	1,983	3,272	7,776	\$ 1,759.10
May-23	\$ 4,268,076	\$ 3,791,413	\$ 1,524,546	\$ 5,315,959	\$ 140,180	\$ 5,456,139	\$ (1,188,063)	1,297	1,979	3,276	7,778	\$ 1,622.70
June-23	\$ 4,258,913	\$ 2,541,868	\$ 1,623,390	\$ 4,165,258	\$ 139,881	\$ 4,305,139	\$ (46,226)	1,294	1,975	3,269	7,760	\$ 1,274.17
July-23	\$ 4,279,141	\$ 4,424,297	\$ 1,472,802	\$ 5,897,099	\$ 140,736	\$ 6,037,835	\$ (1,758,694)	1,311	1,978	3,289	7,798	\$ 1,792.98
August-23	\$ 4,204,984	\$ 4,005,693	\$ 1,693,488	\$ 5,699,181	\$ 137,955	\$ 5,837,136	\$ (1,632,152)	1,269	1,955	3,224	7,673	\$ 1,767.74
September-23	\$ 4,196,809	\$ 4,022,777	\$ 1,489,139	\$ 5,511,916	\$ 137,698	\$ 5,649,614	\$ (1,452,805)	1,267	1,951	3,218	7,671	\$ 1,712.84
Wellness Surcharge	\$ 463,210											
Pharmacy Rebates							\$ 3,195,948					
Total	\$ 51,434,861	\$ 42,575,414	\$ 17,173,874	\$ 59,749,288	\$ 1,671,891	\$ 61,421,179	\$ (6,790,370)	15,375	23,697	39,072	93,032	\$ 1,529.21

Amounts listed on this report may vary from HCSC's financials and are subject to change

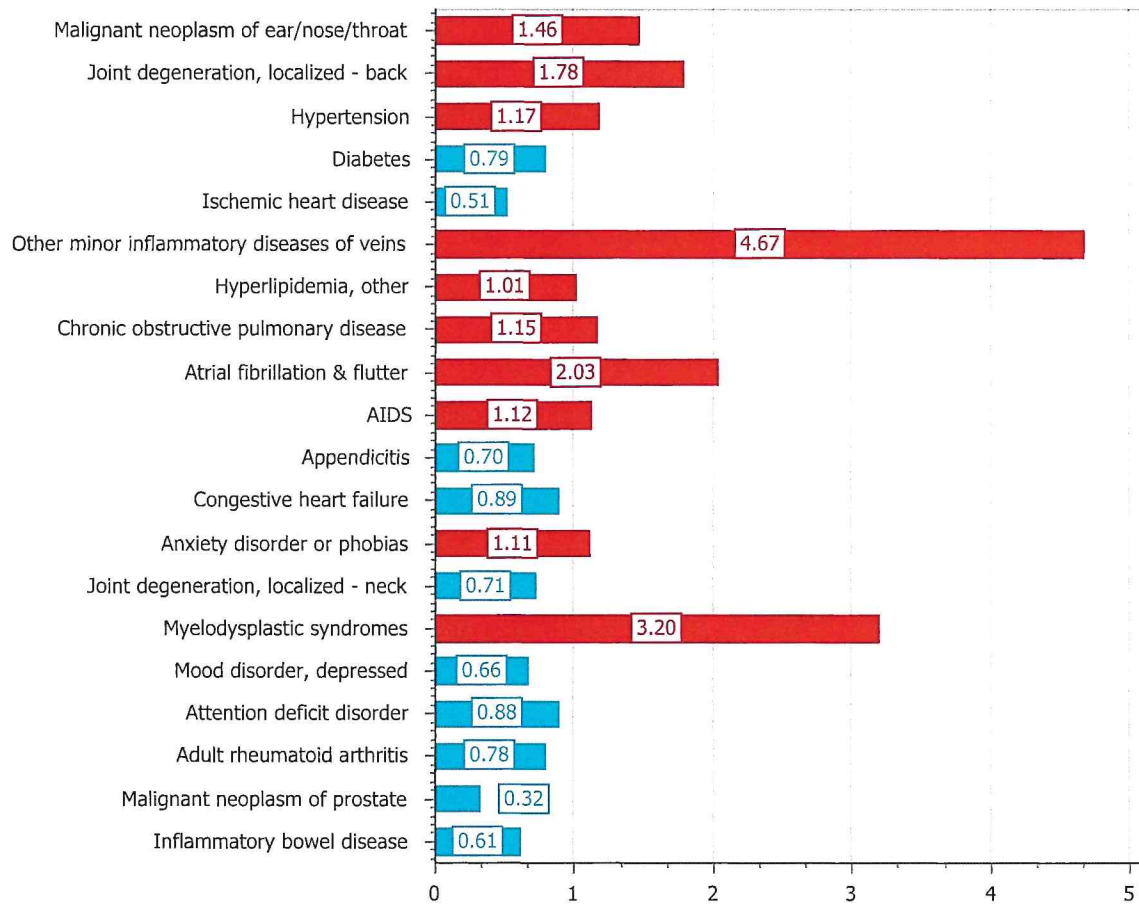


City of Examp
High Cost Claimant Summary - Monitoring Claims over \$100,000
Tiered Stop Loss Deductible - \$250,000/\$350,000 (50% Cost Share)
Claims Paid January 1, 2020 through December 31, 2020

Claimant #	Relationship	Jan-20	Jan-Feb-20	Jan-Mar-20	Jan-Apr-20	Jan-May-20	Jan-Jun-20	Jan-Jul-20	Jan-Aug-20	Jan-Sep-20	Jan-Oct-20	Jan-Nov-20	Jan-Dec-20	Increase (Prior Month)
1	EMPLOYEE	\$ -	\$ 147,838	\$ 150,927	\$ 152,004	\$ 152,073	\$ 152,091	\$ 152,573	\$ 152,901	\$ 152,974	\$ 154,380	\$ 154,702	\$ 154,792	\$ 90
2	CHILD	\$ -	\$ 108,356	\$ 109,041	\$ 109,324	\$ 109,719	\$ 109,856	\$ 109,867	\$ 109,948	\$ 110,023	\$ 110,023	\$ 110,023	\$ 110,023	\$ -
3	SPOUSE	\$ -	\$ 102,642	\$ 208,254	\$ 232,743	\$ 241,080	\$ 247,242	\$ 251,263	\$ 261,263	\$ 298,685	\$ 320,746	\$ 340,173	\$ 414,729	\$ 74,557
4	CHILD	\$ -	\$ 118,866	\$ 118,494	\$ 133,894	\$ 249,661	\$ 263,558	\$ 276,719	\$ 282,692	\$ 300,135	\$ 322,381	\$ 334,684	\$ 372,884	\$ 38,200
5	EMPLOYEE	\$ -	\$ -	\$ 125,636	\$ 125,774	\$ 130,520	\$ 132,583	\$ 133,631	\$ 135,323	\$ 137,297	\$ 140,251	\$ 140,969	\$ 142,859	\$ 1,890
6	EMPLOYEE	\$ -	\$ -	\$ -	\$ 107,959	\$ 119,924	\$ 199,082	\$ 204,366	\$ 208,432	\$ 213,005	\$ 213,060	\$ 217,929	\$ 219,029	\$ 1,100
7	CHILD	\$ -	\$ -	\$ -	\$ -	\$ 103,204	\$ 117,262	\$ 134,473	\$ 156,525	\$ 197,049	\$ 217,332	\$ 237,948	\$ 255,813	\$ 17,865
8	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ 101,782	\$ 107,444	\$ 120,567	\$ 126,860	\$ 133,190	\$ 150,915	\$ 156,258	\$ 165,767	\$ 9,509
9	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100,528	\$ 100,779	\$ 100,779	\$ 100,989	\$ 104,810	\$ 104,810	\$ 105,587	\$ 777
10	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 144,178	\$ 197,464	\$ 218,161	\$ 263,987	\$ 303,523	\$ 359,792	\$ 383,223	\$ 23,431
11	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 141,002	\$ 154,136	\$ 157,757	\$ 157,921	\$ 158,372	\$ 161,491	\$ 3,119
12	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 102,943	\$ 118,764	\$ 132,201	\$ 136,294	\$ 155,878	\$ 192,219	\$ 36,341
13	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 115,742	\$ 126,728	\$ 212,709	\$ 258,310	\$ 260,404	\$ 2,094
14	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 113,858	\$ 128,949	\$ 133,081	\$ 133,081	\$ 136,042	\$ 2,961
15	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 124,909	\$ 173,710	\$ 173,710	\$ 222,406	\$ 246,902	\$ 24,497
16	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 157,296	\$ 157,975	\$ 160,254	\$ 160,780	\$ 526
17	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 129,971	\$ 137,268	\$ 143,913	\$ 162,343	\$ 18,430
18	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 104,228	\$ 115,801	\$ 127,374	\$ 138,947	\$ 11,573
19	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 115,066	\$ 119,177	\$ 124,768	\$ 5,591
20	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 105,951	\$ 106,980	\$ 131,510	\$ 24,531
21	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 107,150	\$ 107,859	\$ 709
22	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 101,095	\$ 119,217	\$ 18,123
23	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 107,546	\$ 107,546
24	SPOUSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 102,138	\$ 102,138
25	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 119,659	\$ 119,659
26	CHILD	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 104,463	\$ 104,463
27	EMPLOYEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 121,392	\$ 121,392
Monthly Total		\$ -	\$ 477,703	\$ 712,351	\$ 861,698	\$ 1,207,963	\$ 1,573,825	\$ 1,925,647	\$ 2,380,293	\$ 3,018,174	\$ 3,483,196	\$ 3,951,276	\$ 4,822,386	\$ 871,110
Estimated Stop Loss		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,779	\$ 13,991	\$ 21,977	\$ 56,403	\$ 98,325	\$ 151,375	\$ 278,944	

Paid Claims totals are shown cumulative from January, 2020. Note: This report contains Proprietary and Confidential Information.
Actual Stop Loss Reimbursements may slightly vary from estimated amounts shown.

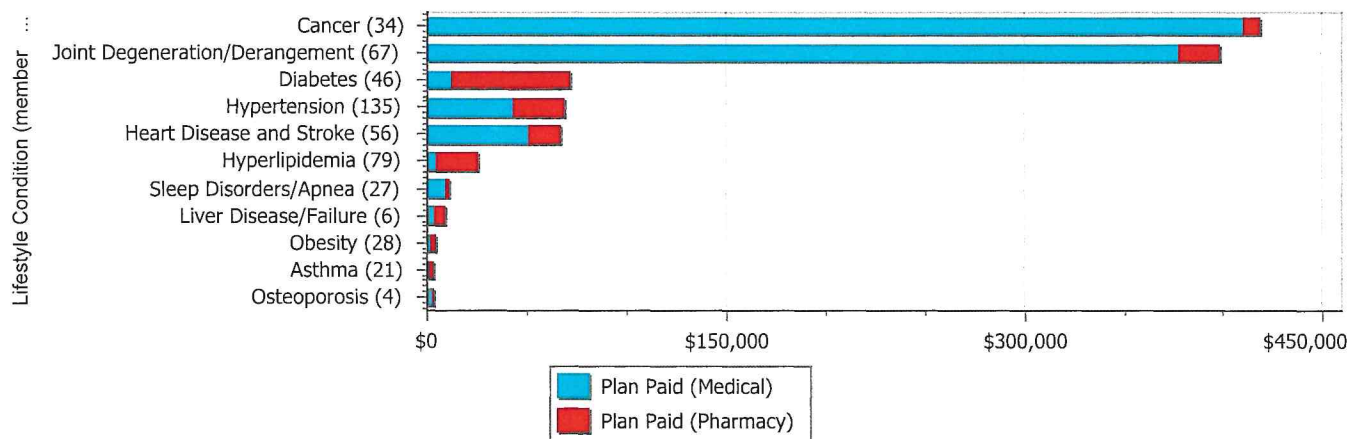
Top 20 Conditions: Benchmark Comparison



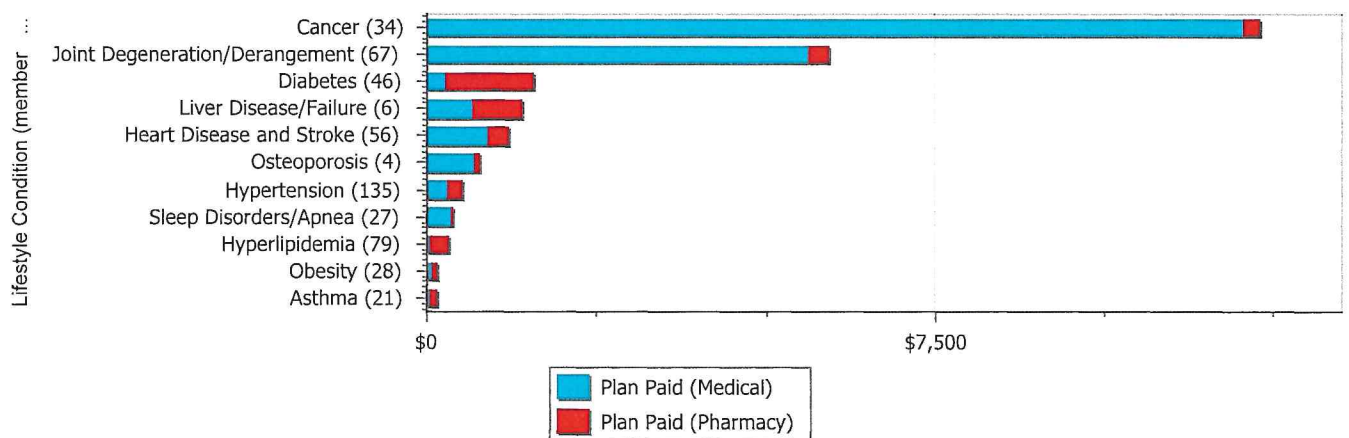
EPISODE	# CLAIMANTS	TOTAL PAID	BENCHMARK SCALE (1 = NORM)	\$ OVER OR UNDER (\$0 = NORM)
Malignant neoplasm of ear/nose/throat	2	\$124,155.24	1.46	\$39,322.18
Joint degeneration, localized - back	24	\$108,194.73	1.78	\$47,561.99
Hypertension	125	\$98,969.96	1.17	\$14,362.72
Diabetes	30	\$81,787.77	0.79	(\$22,144.53)
Ischemic heart disease	30	\$54,851.24	0.51	(\$52,529.86)
Other minor inflammatory diseases of veins	1	\$34,248.47	4.67	\$26,915.11
Hyperlipidemia, other	68	\$33,010.79	1.01	\$217.79
Chronic obstructive pulmonary disease	12	\$28,997.34	1.15	\$3,853.79
Atrial fibrillation & flutter	10	\$28,239.77	2.03	\$14,356.36
AIDS	1	\$24,737.57	1.12	\$2,720.83
Appendicitis	2	\$23,226.21	0.70	(\$9,740.69)
Congestive heart failure	10	\$23,122.82	0.89	(\$2,845.58)
		\$1,189,664.72	0.87	(\$271,810.00)

Paid: 10/1/2020 to 9/30/2021

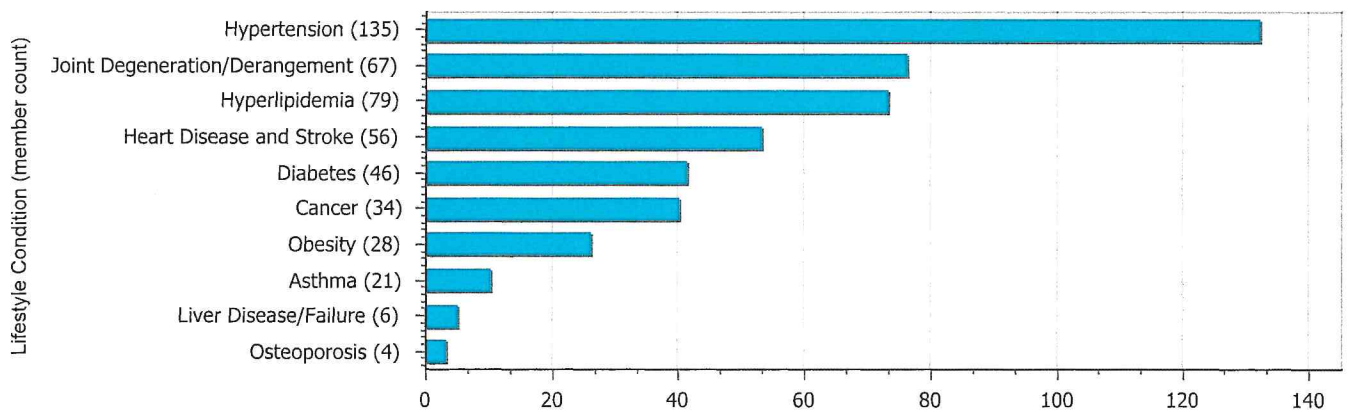
Lifestyle Conditions by Total Paid



Lifestyle Conditions by Average Plan Paid Per Member



Lifestyle Conditions by Prevalence*



*prevalence(n): the total number of episodes of care in a given population.

Paid: 10/1/2020 to 5/31/2021

High Cost Claimant

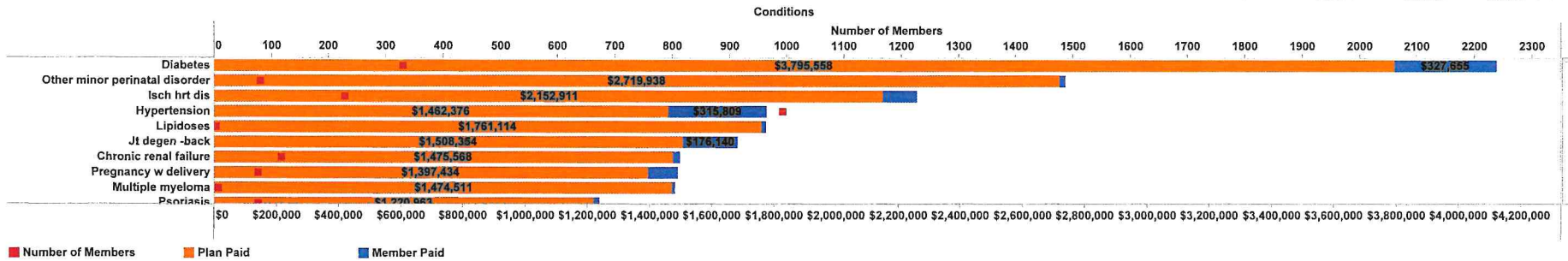
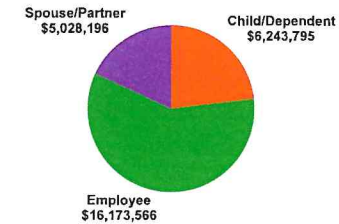
Filters:	Show Only Claimants	Demographic Type	Group Code	Plan Code	Cohort Selection
	Over \$100,000	Relationship	All	All	None

SAMPLE CITY - 1,600 Employees

High Cost Member List - (Only Members Over \$100,000) (Red = No Longer Enrolled)

Member	Gender	Relationshiptype	Currently Enrolled?	Age	Plan Paid	Member Paid	Retrospective Risk	Prospective Risk	Actuarial Risk
Member 1	M	Employee	Yes	54	\$1,002,658	\$8,640	25	25	25
Member 2	M	Child/Dependent	Yes	0	\$960,015	\$2,586	25	25	25
Member 3	M	*	No	2	\$944,009	\$3,800	25	24	23
Member 4	F	Child/Dependent	No	16	\$935,639	\$7,574	20	20	20
Member 5	F	Child/Dependent	No	18	\$843,494	\$7,662	20	21	21
Member 6	F	Child/Dependent	No	0	\$813,102	\$2,500	25	24	24
Member 7	M	Spouse/Partner	Yes	59	\$666,604	\$5,542	25	25	25
Member 8	M	Employee	Yes	49	\$642,602	\$3,972	25	24	24
Member 9	M	Employee	Yes	58	\$563,855	\$11,451	25	24	24
Member 10	F	Employee	No	62	\$432,881	\$5,712	25	25	25
Member 11	F	Employee	Yes	60	\$423,614	\$3,251	23	23	22
Member 12	M	Child/Dependent	Yes	20	\$378,902	\$4,839	21	21	20
Member 13	M	Employee	Yes	43	\$376,599	\$10,987	25	25	25
Member 14	F	Employee	Yes	57	\$340,618	\$8,984	22	22	22
Member 15	M	Employee	Yes	69	\$323,166	\$3,844	19	21	21
Member 16	M	*	No	53	\$315,242	\$6,591	24	24	24
Member 17	M	Spouse/Partner	Yes	65	\$304,930	\$6,016	25	25	25

Total Cost by Relationship - (Only Members Over \$100,000)



Incurred Filter On/Off	Incurred Start Date	Incurred End Date	Paid Filter On/Off	Paid Start Date	Paid End Date
On	Jan, 2016	Jan, 2020	Off	Jan, 2016	Mar, 2020

Powered By **RISK** **GEHRING**
strategies GROUP
A BERKSHIRE COMPANY

SAMPLE SELF INSURED CLAIMS EXPERIENCE REPORT

Medical Claims Experience Report January 1, 20XX - Current

PLAN TOTAL COMBINED	Monthly Funding	In-Network	Out-of-Network	Capitation	Pharmacy	Total Claims	Cigna ASO Payment	Individual Stop Loss Premium	Aggregate Stop Loss Premium	Total Plan Cost	Surplus/(Deficit)	Loss Ratio	EE	EE+1	EE+F	Total	Claims/EE/ Month
January-XX	\$ 389,889	\$ 353,092	\$ 426	\$ 13,736	\$ 22,352	\$ 389,607	\$ 22,641	\$ 68,602	\$ 3,903	\$ 484,753	\$ (94,864)	99.9%	126	78	136	340	\$ 1,145.90
February-XX	\$ 389,758	\$ 207,696	\$ (1,086)	\$ 14,590	\$ 40,825	\$ 262,025	\$ 22,575	\$ 68,400	\$ 3,892	\$ 356,892	\$ 32,866	67.2%	126	75	138	339	\$ 772.94
March-XX	\$ 390,456	\$ 322,718	\$ 1,460	\$ 14,535	\$ 57,956	\$ 396,669	\$ 22,641	\$ 68,602	\$ 3,903	\$ 491,814	\$ (101,358)	101.6%	127	75	138	340	\$ 1,166.67
April-XX	\$ 386,941	\$ 184,200	\$ 2,468	\$ 14,644	\$ 79,638	\$ 280,950	\$ 22,441	\$ 67,996	\$ 3,869	\$ 375,256	\$ 11,686	72.6%	126	74	137	337	\$ 833.68
May-XX	\$ 385,266	\$ 248,362	\$ 635	\$ 14,464	\$ 81,035	\$ 344,497	\$ 22,441	\$ 67,996	\$ 3,869	\$ 438,802	\$ (53,536)	89.4%	127	75	135	337	\$ 1,022.24
June-XX	\$ 390,629	\$ 294,583	\$ 1,378	\$ 14,742	\$ 84,306	\$ 395,010	\$ 22,705	\$ 68,804	\$ 3,915	\$ 490,434	\$ (99,805)	101.1%	126	80	135	341	\$ 1,158.39
July-XX	\$ 385,612	\$ 173,423	\$ 1,245	\$ 14,650	\$ 90,287	\$ 279,604	\$ 22,572	\$ 68,400	\$ 3,892	\$ 374,468	\$ 11,144	72.5%	127	81	131	339	\$ 824.79
August-XX	\$ 388,991	\$ 293,427	\$ 386	\$ 14,292	\$ 92,804	\$ 400,909	\$ 22,772	\$ 69,005	\$ 3,926	\$ 496,612	\$ (107,621)	103.1%	129	80	133	342	\$ 1,172.25
September-XX	\$ 386,752	\$ 176,929	\$ (230)	\$ 15,291	\$ 95,748	\$ 287,738	\$ 22,639	\$ 68,602	\$ 3,903	\$ 382,881	\$ 3,871	74.4%	128	80	132	340	\$ 846.29
October-XX	\$ 383,810	\$ 290,123	\$ 44	\$ 15,454	\$ 101,483	\$ 407,103	\$ 22,506	\$ 68,198	\$ 3,880	\$ 501,688	\$ (117,878)	106.1%	127	81	130	338	\$ 1,204.45
November-XX	\$ 388,284	\$ 398,281	\$ 695	\$ 19,605	\$ 81,620	\$ 500,202	\$ 22,840	\$ 69,207	\$ 3,938	\$ 596,186	\$ (207,902)	128.8%	130	82	131	343	\$ 1,458.31
December-XX	\$ 388,284	\$ 326,466	\$ 427	\$ 14,483	\$ 106,719	\$ 448,095	\$ 22,840	\$ 69,207	\$ 3,938	\$ 544,080	\$ (155,795)	115.4%	130	82	131	343	\$ 1,306.40
20XX Plan Year	\$ 4,654,674	\$ 3,269,300	\$ 7,847	\$ 180,487	\$ 934,775	\$ 4,392,409	\$ 271,612	\$ 823,020	\$ 46,827	\$ 5,533,867	\$ (879,193)	94.4%	1,529	943	1,607	4,079	\$ 1,076.83

*Actual claims only include claims up to the Stop Loss limit

Sample County
Claims Experience Report - Florida Blue
2018 - 2019 Plan Year

SAMPLE MINIMUM PREMIUM CLAIMS EXPERIENCE



Base BO Plan	Funding	Hospital	Physician	Other	Pharmacy	Total Paid Claims	ASO Fees	Stop Loss Fees	Total Plan Cost	Reserve Accumulation ⁽¹⁾	EE	EE+F	Total	Claims PEPM
October-18	\$ 311,533	\$ 80,763	\$ 55,012	\$ 8,844	\$ 42,491	\$ 187,110	\$ 25,620	\$ 31,721	\$ 244,451	\$ 67,082	412	76	488	\$ 383.42
November-18	\$ 313,742	\$ 56,448	\$ 59,599	\$ 6,362	\$ 44,471	\$ 166,880	\$ 25,778	\$ 31,956	\$ 224,613	\$ 89,129	414	77	491	\$ 339.88
December-18	\$ 318,713	\$ 37,347	\$ 40,577	\$ 9,547	\$ 31,521	\$ 118,993	\$ 26,198	\$ 32,457	\$ 177,648	\$ 141,065	421	78	499	\$ 238.46
January-19	\$ 318,161	\$ 23,946	\$ 23,108	\$ 6,992	\$ 50,678	\$ 104,725	\$ 26,198	\$ 32,384	\$ 163,306	\$ 154,855	422	77	499	\$ 209.87
February-19	\$ 317,056	\$ 20,707	\$ 12,321	\$ 6,501	\$ 37,513	\$ 77,042	\$ 26,093	\$ 32,277	\$ 135,411	\$ 181,645	420	77	497	\$ 155.01
March-19	\$ 314,294	\$ 26,065	\$ 12,924	\$ 9,019	\$ 34,506	\$ 82,514	\$ 25,830	\$ 32,009	\$ 140,353	\$ 173,941	415	77	492	\$ 167.71
April-19	\$ 317,056	\$ 21,394	\$ 14,910	\$ 6,951	\$ 35,040	\$ 78,295	\$ 25,988	\$ 32,317	\$ 136,599	\$ 180,457	416	79	495	\$ 158.17
May-19	\$ 319,818	\$ 49,349	\$ 19,849	\$ 8,573	\$ 53,250	\$ 131,021	\$ 26,145	\$ 32,625	\$ 189,791	\$ 130,027	417	81	498	\$ 263.09
June-19	\$ 320,370	\$ 139,732	\$ 34,314	\$ 7,995	\$ 22,039	\$ 204,080	\$ 26,198	\$ 32,679	\$ 262,956	\$ 57,415	418	81	499	\$ 408.98
July-19	\$ 317,609	\$ 76,403	\$ 41,630	\$ 13,137	\$ 41,740	\$ 172,910	\$ 25,988	\$ 32,391	\$ 231,289	\$ 86,320	415	80	495	\$ 349.31
August-19	\$ 318,713	\$ 33,115	\$ 27,590	\$ 17,176	\$ 38,625	\$ 116,506	\$ 26,093	\$ 32,498	\$ 175,097	\$ 143,617	417	80	497	\$ 234.42
September-19	\$ 321,475	\$ 113,681	\$ 40,507	\$ 13,976	\$ 29,798	\$ 197,962	\$ 26,355	\$ 32,765	\$ 257,083	\$ 64,392	422	80	502	\$ 394.35
2018-2019	\$ 3,808,541	\$ 678,950	\$ 382,343	\$ 115,073	\$ 461,672	\$ 1,638,038	\$ 312,480	\$ 388,078	\$ 2,338,596	\$ 1,469,945	5,009	943	5,952	\$ 275.21
Single	\$ 552.36						\$ 52.50	\$ 53.52						
Family	\$ 1,104.74						\$ 52.50	\$ 127.25						

Buy-Up BO Plan	Funding	Hospital	Physician	Other	Pharmacy	Total Paid Claims	ASO Fees	Stop Loss Fees	Total Plan Cost	Reserve Accumulation ⁽¹⁾	EE	EE+F	Total	Claims PEPM
October-18	\$ 176,817	\$ 132,764	\$ 29,524	\$ 21,769	\$ 47,223	\$ 231,279	\$ 12,495	\$ 16,645	\$ 260,420	\$ (83,602)	185	53	238	\$ 971.76
November-18	\$ 175,602	\$ 90,696	\$ 26,973	\$ 14,685	\$ 46,310	\$ 178,665	\$ 12,443	\$ 16,518	\$ 207,625	\$ (32,023)	185	52	237	\$ 753.86
December-18	\$ 175,602	\$ 78,279	\$ 82,439	\$ 8,413	\$ 48,595	\$ 217,726	\$ 12,443	\$ 16,518	\$ 246,686	\$ (71,084)	185	52	237	\$ 918.67
January-19	\$ 172,564	\$ 127,769	\$ 33,637	\$ 6,426	\$ 51,410	\$ 219,242	\$ 12,338	\$ 16,190	\$ 247,769	\$ (75,205)	186	49	235	\$ 932.94
February-19	\$ 173,172	\$ 27,352	\$ 21,495	\$ 8,311	\$ 45,347	\$ 102,504	\$ 12,443	\$ 16,223	\$ 131,170	\$ 42,002	189	48	237	\$ 432.51
March-19	\$ 174,387	\$ 124,865	\$ 26,370	\$ 4,955	\$ 34,054	\$ 190,245	\$ 12,495	\$ 16,351	\$ 219,090	\$ (44,703)	189	49	238	\$ 799.35
April-19	\$ 177,425	\$ 156,462	\$ 25,251	\$ 3,768	\$ 45,920	\$ 231,401	\$ 12,705	\$ 16,638	\$ 260,744	\$ (83,319)	192	50	242	\$ 956.20
May-19	\$ 179,856	\$ 55,741	\$ 29,622	\$ 7,399	\$ 49,419	\$ 142,181	\$ 12,810	\$ 16,893	\$ 171,884	\$ 7,972	192	52	244	\$ 582.71
June-19	\$ 181,678	\$ 81,324	\$ 66,402	\$ 9,477	\$ 38,247	\$ 195,450	\$ 12,915	\$ 17,074	\$ 225,439	\$ (43,760)	193	53	246	\$ 794.51
July-19	\$ 178,640	\$ 80,555	\$ 44,881	\$ 15,015	\$ 34,602	\$ 175,054	\$ 12,653	\$ 16,806	\$ 204,513	\$ (25,872)	188	53	241	\$ 726.37
August-19	\$ 179,248	\$ 57,458	\$ 36,680	\$ 15,322	\$ 35,000	\$ 144,460	\$ 12,653	\$ 16,880	\$ 173,992	\$ 5,256	187	54	241	\$ 599.42
September-19	\$ 178,033	\$ 57,699	\$ 18,870	\$ 8,477	\$ 32,425	\$ 117,471	\$ 12,548	\$ 16,773	\$ 146,791	\$ 31,242	185	54	239	\$ 491.51
2018-2019	\$ 2,123,024	\$ 1,070,965	\$ 442,142	\$ 124,018	\$ 508,552	\$ 2,145,677	\$ 150,938	\$ 199,509	\$ 2,496,124	\$ (373,099)	2,256	619	2,875	\$ 746.32
Single	\$ 607.62						\$ 52.50	\$ 53.52						
Family	\$ 1,215.24						\$ 52.50	\$ 127.25						

TOTAL	Funding	Hospital	Physician	Other	Pharmacy	Total Paid Claims	ASO Fees	Stop Loss Fees	Total Plan Cost	Reserve Accumulation ⁽¹⁾	EE	EE+F	Total	Claims PEPM
October-18	\$ 488,350	\$ 213,527	\$ 84,536	\$ 30,613	\$ 89,714	\$ 418,389	\$ 38,115	\$ 48,367	\$ 504,871	\$ (16,521)	597	129	726	\$ 576.29
November-18	\$ 489,344	\$ 147,144	\$ 86,572	\$ 21,047	\$ 90,781	\$ 345,544	\$ 38,220	\$ 48,474	\$ 432,238	\$ 57,106	599	129	728	\$ 474.65
December-18	\$ 494,315	\$ 115,626	\$ 123,016	\$ 17,961	\$ 80,116	\$ 336,719	\$ 38,640	\$ 48,976	\$ 424,335	\$ 69,981	606	130	736	\$ 457.50
January-19	\$ 490,725	\$ 151,716	\$ 56,745	\$ 13,418	\$ 102,088	\$ 323,967	\$ 38,535	\$ 48,574	\$ 411,075	\$ 79,650	608	126	734	\$ 441.37
February-19	\$ 490,228	\$ 48,059	\$ 33,816	\$ 14,812	\$ 82,859	\$ 179,546	\$ 38,535	\$ 48,500	\$ 266,581	\$ 223,647	609	125	734	\$ 244.61
March-19	\$ 488,681	\$ 150,930	\$ 39,294	\$ 13,975	\$ 68,560	\$ 272,759	\$ 38,325	\$ 48,360	\$ 359,443	\$ 129,238	604	126	730	\$ 373.64
April-19	\$ 494,481	\$ 177,857	\$ 40,161	\$ 10,719	\$ 80,959	\$ 309,696	\$ 38,693	\$ 48,955	\$ 397,344	\$ 97,138	608	129	737	\$ 420.21
May-19	\$ 499,674	\$ 105,090	\$ 49,471	\$ 15,972	\$ 102,669	\$ 273,202	\$ 38,955	\$ 49,518	\$ 361,675	\$ 137,999	609	133	742	\$ 368.20
June-19	\$ 502,049	\$ 221,056	\$ 100,715	\$ 17,472	\$ 60,287	\$ 399,530	\$ 39,113	\$ 49,752	\$ 488,395	\$ 13,654	611	134	745	\$ 536.28
July-19	\$ 496,249	\$ 156,958	\$ 86,511	\$ 28,152	\$ 76,343	\$ 347,965	\$ 38,640	\$ 49,197	\$ 435,801	\$ 60,448	603	133	736	\$ 472.78
August-19	\$ 497,961	\$ 90,573	\$ 64,270	\$ 32,498	\$ 73,625	\$ 260,966	\$ 38,745	\$ 49,378	\$ 349,089	\$ 148,872	604	134	738	\$ 353.61
September-19	\$ 499,508	\$ 171,380	\$ 59,377	\$ 22,453	\$ 62,223	\$ 315,433	\$ 38,903	\$ 49,538	\$ 403,874	\$ 95,634	607	134	741	\$ 425.69
Estimated Stop Loss Reimbursement (Claims Exceeding \$200,000)										\$ 35,649				
2018-2019	\$ 5,931,565	\$ 1,749,915	\$ 824,485	\$ 239,091	\$ 970,224	\$ 3,783,715	\$ 463,418	\$ 587,587	\$ 4,834,720	\$ 1,132,494	7,265	1,562	8,827	\$ 428.65

(1) Reserves for Rolling 12 Months excludes Stop Loss Reimbursement.

Sample Client

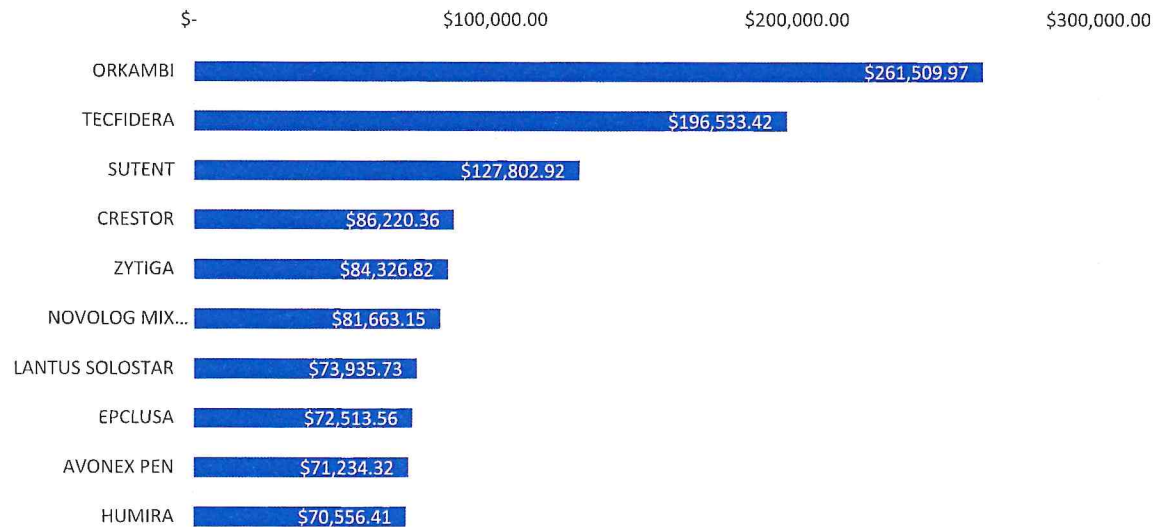
Claims Experience Detail

Paid Period: January - December 20XX

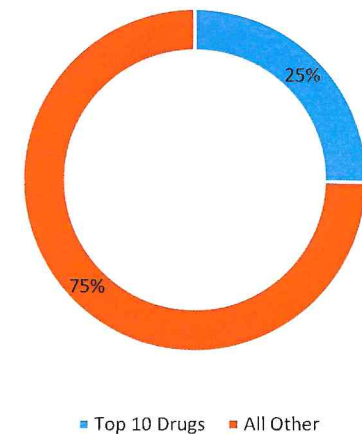
Top 10 Drugs - 20XX Calendar Year

Rank By Paid	Name	Plan Paid	Prior	Change	# Rx	# Members	Average Cost/Member	Condition
1	ORKAMBI	\$ 261,509.97	\$ 121,635.90	115%	13	1	\$ 261,509.97	Cystic Fibrosis
2	TECFIDERA	\$ 196,533.42	\$ 184,304.46	7%	33	3	\$ 65,511.14	Multiple Sclerosis
3	SUTENT	\$ 127,802.92	\$ 69,633.29	84%	9	1	\$ 127,802.92	Renal/Gastro/Pancreatic Cancer
4	CRESTOR	\$ 86,220.36	\$ 96,376.37	-11%	361	77	\$ 1,119.74	High Cholesterol
5	ZYTIGA	\$ 84,326.82	\$ 40,138.74	110%	10	1	\$ 84,326.82	Prostate Cancer
6	NOVOLOG MIX 70/30 PREFILLED FLEXPEN	\$ 81,663.15	\$ 77,917.86	5%	67	14	\$ 5,833.08	Diabetes
7	LANTUS SOLOSTAR	\$ 73,935.73	\$ 84,196.65	-12%	168	28	\$ 2,640.56	Diabetes
8	EPCLUSA	\$ 72,513.56	\$ -	0%	3	1	\$ 72,513.56	Hepatitis C
9	AVONEX PEN	\$ 71,234.32	\$ 58,777.95	21%	13	1	\$ 71,234.32	Multiple Sclerosis
10	HUMIRA	\$ 70,556.41	\$ 69,473.90	2%	9	1	\$ 70,556.41	Rheumatoid Arthritis
Top 10 Drugs		\$ 1,126,296.66	\$ 802,455.12					
All Other		\$ 3,327,155.03	\$ 3,351,428.42					
% of Total Rx Claims		25%	19%					
% of Total Claims		8%	5%					

Top 10 Drugs by Paid - 20XX



Pharmacy Cost - 20XX





GAG CLAUSE PROHIBITION ATTESTATION GUIDE

for Employers

Presented by:

Kate Grangard, CPA, CGMA
Gehring Group/Risk Strategies
Ben Conley, Partner
Seyfarth Shaw

Date: November 14, 2024

1

Agenda

- Brief Background – What is a “Gag Clause” and Why are They Prominent?
- Regulatory Guidance – Light on Details
- What Are We Seeing?
- Detailed Process Overview
- SB 1550 – Prescription Drug Attestation

2

RISK **GEHRING**
GROUP
A RISK MANAGEMENT COMPANY

2

Background – Why Are We Here?

 Adverse-selection Contracting	Health systems leverage the status of their “must-have” providers and require plans to come to terms with providers in the system or none of them. This leaves insurers to take a difficult choice – include all of the systemic providers (even if they are low-value or high-cost) or leave them all.
 Anti-selection or Anti-Community Contracting	Dominant insurers may require a health plan to place all physicians, hospitals, and other facilities associated with a health system in the most favorable tier of providers if it is not buying or at the lowest cost sharing tier to avoid shopping their way from that network (i.e., anti-shopping). This erodes a plan’s ability to develop strategies to high-value providers.
 Non-Adversely selected (NARS) Contracting	Typically used by a dominant insurer in combination with a dominant health system, MFI contracts are contractual agreements on whether a health system agrees not to offer lower prices to any other insurer. For a dominant insurer, this measure may be getting more traction and may not risk insurer can negotiate to other a robust product at lower rates. Fewer plans also allow insurers and providers a chance to raise prices.
 Group Contracts	Group buyers may prevent other parties to a contract from disclosing terms of that agreement, including prices, to a third party. The lack of transparency from group buyers and the mistaken notion that prices are trade secrets undermines price transparency tools for consumers and decreases plan sponsors’ ability to push back on rising prices.

Source: NASH.org

3

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3

Background – Why Are We Here?

- Examples of gag clauses:
 - "Do NOT discuss proposed treatments with [health plan] members prior to receiving authorization. Do NOT discuss the [utilization oversight] process with members. Do NOT give out [plan's oversight] phone number to members."
 - "[Plan sponsor] understands and accepts that [TPA]'s provider allowances and negotiated prices are confidential trade secret information which will not be released."



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CAA Prohibits Gag Clauses

- *Effective Date: 12/27/2020*
- *Who is subject to rule?*
 - Prohibits “group health plans” and “health insurance issuers” from entering into an agreement with:
 - health care provider
 - network or association of providers
 - third-party administrator
 - other service providers offering access to provider network
- *What is prohibited?*
 - Entering into a contract that would directly or indirectly contain a “gag clause”

5

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CAA Prohibits Gag Clauses

- *Gag Clause Defined:*
 - Restrictions on disclosure of provider-specific cost or quality of care information through consumer engagement tool (e.g., cost estimator), or to provider, plan sponsor, participants or eligible employees
 - Restrictions on electronic access to de-identified claims/encounter data (e.g., financial info, provider info, service codes, or other data elements)
 - Restrictions on sharing the above information with a business associate for a permitted purpose under HIPAA



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CAA Prohibits Gag Clauses

- **What's not covered?**
 - Provider/network administrator may impose “reasonable restrictions” on public disclosure of info
 - Not required to disclose full provider contract

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Who is Responsible to File the Attestation

- **Plans** (plan sponsors) and **Issuers** (ex: carriers, TPA's) are responsible for filing
- **Fully Insured Plan** – If an issuer submits on their own behalf, and on behalf of the plan, it is considered (by the applicable depts) to have satisfied the attestation requirement for both
- **Self-funded and partially self-funded plans** – plan may enter into written agreement with service provider such as TPA or PBM to file on the plans behalf – however if the service provider FAILS to submit the plans attestation, the plan is in violation
- **Deadline for filing** – December 31, 2024 and by December 31 for each year thereafter.

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Who is Required to File the Attestation

- **Responsible Entity*** is an issuer or a plan, (all kinds, no one exempted – includes ERISA, Church, & state and local government plans) that has entered into an agreement - generally through TPA, Pharmacy Benefit Managers (BPM), Independent Practice Assns (IPA) or Behavioral Health Managers (BHM) - with health care providers, networks, TPA, or others offering access to a network of providers.
- **Responsible Entity** is responsible for **attesting annually** (unless another party attests on your behalf such as TPA), that reporting entity **complies with prohibition on gag clauses**. **Note: The responsible Entity is the PLAN not the EMPLOYER.**

- ***changed from "Reporting Entity" in 2023**

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Regulatory Guidance

Entities Required to Attest (Reporting Entities)	Entities Not Required to Attest
• Issuers offering individual health insurance coverage, including: ◦ Student health insurance plans ◦ Grandfathered¹ and grandmothered² plans ◦ Policies sold on or off exchanges ◦ Policies sold through an association • Issuers offering group health insurance coverage, including: ◦ Grandfathered and grandmothered plans ◦ Policies sold on or off exchanges ◦ All other group health insurance plans • Group health plans, including the following to the extent they are considered group health plans: ◦ ERISA plans³ for sponsors of ERISA ◦ Non-federal governmental plans,⁴ such as plans sponsored by state or local governments ◦ Church plans⁵ ◦ Grandfathered group health plans	• Account-based plans, such as health reimbursement arrangements (HRAs), including individual coverage HRAs⁶ • Issuers and group health plans that offer only excepted benefits⁷ coverage, including, but not limited to: ◦ Hospital indemnity or other fixed indemnity insurance ◦ Disease-specific insurance ◦ Dental, vision and long-term care ◦ Accident-only, disability and workers' compensation • Issuers that offer only short-term, limited-duration insurance • Medicare and Medicaid plans • State children's health insurance

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What Are We Seeing?

- **Question 1:**
 - Will TPA/Carrier attest on your behalf?
- **If no, Question 2:**
 - Will TPA provide assurances of no gag clauses?
- **If no, Question 3:**
 - Review contract (and sub-contracts) to confirm no gag clauses or amend contract with “override” language.

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Question 1: Will TPA/Carrier Attest on your Behalf?

- Initial hesitation among TPAs to assume reporting obligation
- Sample contract language:
 - **Gag Clause Attestation.** Claim Administrator will perform, on behalf of Employer, any annual required attestation verifying that the Claim Administrator's contract (and any subcontracts impacting the services thereunder) contains no “gag clauses” as defined under Section 201 of the Consolidated Appropriations Act, 2021, 42 U.S. Code § 300gg-119(a)(1)
- Some TPAs have now agreed (see slides that follow)*
 - *Even if your TPA is on this list, you should confirm the TPA will report (in writing)

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Question 2: Will TPA Provide Assurances?

- Beware of representations that stop short of full assurance:
 - “Both parties will comply with applicable law”
 - “Not aware of any contracts” with prohibited language
 - Statements covering current-year only

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Question 3: Review Contract

- Remember that prohibition extends to provider contracts that you may not have access to.
- Instead, try “override” language:
 - “No Gag Clauses. TPA represents and warrants that nothing in the parties’ Agreement (including any subcontracts or provider agreements thereunder) would constitute a ‘gag clause’ as defined under Section 201 of the Consolidated Appropriations Act, 2021, 42 U.S. Code § 300gg-119(a)(1).”

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Carrier Updates – Who’s Filing for Whom AETNA – updated for 2024

Aetna will attest on behalf of all fully-insured group plans but self-insured plans must attest on their own. Compliance attestation to left, noting update to file for fully-insured. Look for individual email of attestation from Aetna.

Letter: Thursday, August 29, 2024 8:39 AM
To: [Redacted]
Cc: [Redacted]
Subject: RE: Gap Closure Attestation

Caution: This email originated from outside of our organization. Please do not click any attachments or follow any links from untrusted sources or unsolicited email.

Re: Aetna
Hello [Redacted],
This is a reminder that Aetna will attest on behalf of all fully-insured group plans but self-insured plans must attest on their own. Compliance attestation to left, noting update to file for fully-insured. Look for individual email of attestation from Aetna.

Best regards,
Kathy Evans, MBA
Account Manager | 973.939.8346

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Carrier Updates – Who’s Filing for Whom CIGNA – updated for 2024

Consolidated Appropriations Act (CAA) – updates through 2024

Cigna Healthcare™ has an ongoing commitment to comply with the Transparency in Coverage rule and the Consolidated Appropriations Act, 2021 (CAA). This communication is being sent to all Cigna Healthcare self-insured, Administrative Services Only (ASO) medical clients. Below are key dates and other information related to Gap Closure Prohibition Compliance Attestation (CAA section 201) and Prescription Drug and Health Care Spend reporting (CAA section 204).

Cigna will attest on behalf of all fully insured, level funded, and graded fund group plans. The letter to the right is evidence of compliance for self-insured plans who must attest on their own.

Gap Closure Prohibition Compliance Attestation

- **Compliance with the CAA:** Cigna Healthcare will attest on behalf of all fully insured, level funded, and graded fund group plans. Self-insured plans must attest on their own.
- **Compliance with the CAA:** Cigna Healthcare will attest on behalf of all fully insured, level funded, and graded fund group plans. Self-insured plans must attest on their own.

For fully insured clients:

- As of 8/29/2024, and as of 8/29/2024, Cigna Healthcare will be attesting to the CAA on behalf of all fully insured, level funded, and graded fund group plans.
- **Provisional compliance:** Cigna Healthcare will attest on behalf of all fully insured, level funded, and graded fund group plans. Self-insured plans must attest on their own.

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Carrier Updates – Who’s Filing for Whom FLORIDA BLUE

Florida Blue will attest on behalf of all group plans regardless of funding type or entity size as confirmed in their Sales News Alert.

Letter: Thursday, August 29, 2024 8:39 AM
To: [Redacted]
Cc: [Redacted]
Subject: RE: Gap Closure Attestation

Caution: This email originated from outside of our organization. Please do not click any attachments or follow any links from untrusted sources or unsolicited email.

Re: Florida Blue
Hello [Redacted],
This is a reminder that Florida Blue will attest on behalf of all group plans regardless of funding type or entity size as confirmed in their Sales News Alert.

Best regards,
Kathy Evans, MBA
Account Manager | 973.939.8346

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Carrier Updates – Who’s Filing for Whom UNITED HEALTH CARE-updated for 2024

United Health Care will attest on behalf of all fully-insured group plans but self-insured plans must attest on their own. See the UHC letter of compliance to right.

Letter: Thursday, August 29, 2024 8:39 AM
To: [Redacted]
Cc: [Redacted]
Subject: RE: Gap Closure Attestation

Caution: This email originated from outside of our organization. Please do not click any attachments or follow any links from untrusted sources or unsolicited email.

Re: United Health Care
Hello [Redacted],
This is a reminder that United Health Care will attest on behalf of all fully-insured group plans but self-insured plans must attest on their own. See the UHC letter of compliance to right.

Best regards,
Kathy Evans, MBA
Account Manager | 973.939.8346

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Carrier Updates – Who's Filing for Whom Carrier Summary: Snapshot as of Today

Plan Issuer Carrier/ASO	Who Attests when Plan is Fully-Insured	Who Attests when Plan is Self-Insured	It is recommended that you keep the confirmation letter you received if a carrier/TPA/PBM has confirmed they will attest on the plan's behalf.
Aetna	Aetna	Plan Sponsor	
Cigna	Cigna	Cigna – Level and Graded Funded Plan Sponsor – Self-Insured	
Florida Blue	Florida Blue	Florida Blue	
	Expect FMIT – League of Cities will file for all plan sponsors		
FMIT			
Humana	Plan Sponsor	Plan Sponsor	
United Health Care	United Health Care	Plan Sponsor	

If your carrier is not listed above, please check your e-mail for Confirmation of Compliance from your medical and PBM carrier (if not integrated). Please reach out to your consultant for assistance as needed.

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Gag Clause Prohibition Attestation Guide

Completing & Submitting the Attestation Webform

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2024 Updates

- Added webform selection for the "attestation year." Attestations made in 2024, for example, have an attestation year of 2024 even though the attestation period spans from the end date of the 2023 attestation to the attestation date in 2024.
- Added webform and template fields for the "attestation period," or the date range that the attestation covers.
- Employer plan types in Step 1 expanded to include 3 categories of group health plans (GHP)
 - ERISA group health plan (GHP) or sponsor of ERISA plan,* including a plan sponsored or established by a union
 - (Non-Federal) governmental group health plan
 - Church plan
- "Reporting Entity" changed to "Responsible Entity."

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2024 Updates

- Step 3, Responsible Entity types expanded in the instructions to clarify that ERISA group health plan (GHP), or sponsor of ERISA plan, includes a plan sponsored or established by a union. Responsible entities also modified to clarify terms:
 - Third-party administrator (TPA)
 - Pharmacy benefit manager (PBM)
 - Behavioral health network manager (BHN)
 - Other third-party service provider, such as an agent.
- Step 3, clarified labels in webform and template regarding types of provider agreements:
 - Medical network
 - Pharmacy benefit manager network
 - Behavioral health network
 - Other
- Text box added in webform to allow submitter to enter "Other Limitations."
- Modified attestation language to remove forward-looking agreement actions.

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2024 Updates

- Added Definitions in the appendix, Section 4.2.
- Modified attestation language to accommodate date range and information provided through the submission process.

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Attestation Webform Resources

- Gag Clause Prohibition Compliance Attestation Home Page (where you go to start your attestation <https://hios.cms.gov/HIOS-GCPCA-UI>)
- Health & Human Services (HHS) Gag Clause Prohibition Compliance Attestation (GCPCA) webpage: <https://www.cms.gov/marketplace/about/oversight/other-insurance-protections/gag-clause-prohibition-compliance-attestation>
 - On this page are links for:
 - Frequently Asked Questions - https://regtap.cms.gov/reg_library.php?i=5482
 - Instructions for submitting the GCPCA - https://regtap.cms.gov/reg_library.php?i=5481
 - User Manual for submitting the GCPFA - https://regtap.cms.gov/reg_library.php?i=5479 (note this includes step by step instructions with screen shots)
 - GCPCA Reporting Entity Excel Template - https://regtap.cms.gov/reg_library.php?i=5480

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Attestation Terms to Know

- **Attesting Entity** – the reporting entity, such as the plan, issuer, or contracted reporting entity (ex: TPA) that attests on behalf of the reporting entity.
- **Attester** – individual with legal authority to sign the GPCPA on behalf of the plan
- **Submitter** – the individual who completes the required fields on the webform and prepares the excel spreadsheet (if needed) on the Attester's behalf, subject to Attester's review and signature
 - The submitter and attester can be the same individual.
 - Only use excel spreadsheet if submitting for more than one reporting entity (ex: FMIT or TPA would use this sheet)



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Info Needed to Complete the Attestation

- **Submitter** - first name, last name, position title, e-mail address, phone number and employer name
- **Attester** (if different indiv) - first name, last name, position title, e-mail address, phone number and employer name
- **Responsible Entity's Info** - 9 Digit EIN (use EIN for the group health plan. If none, use EIN for plan sponsor)
- **Type of Plan:**
 - ERISA (private and not-for profit)
 - Non-Federal governmental
 - Church

NOTE: AN EMPLOYER PLAN, EVEN IF SELF-INSURED IS NOT AN ISSUER FOR PURPOSES OF THIS ATTESTATION.



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Info Needed to Complete the Attestation

- **Point of Contact info** – person who can respond to questions from the Departments - first name, last name, e-mail address, phone number
- **The types of provider agreements** you will be attesting for (all that apply):
 - Medical
 - Pharmacy Benefit Manager
 - Behavioral Health (when not part of the medical – when a separate not excepted benefit plan)

Note: For non-integrated PBM's – be sure you have verification from each provider that they have complied with the Gag Clause.



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Filing the Attestation - Resources

Gag Clause Prohibition Compliance Attestation (GPCPA) User Manual



Center for Consumer Information & Insurance Oversight (CCIIO)
Version 01.00 (R)
August 2014

Attestation Step by Step Guide Book – User Manual
https://rgtap.cms.gov/reg_library.php?i=5479

Prep Step 1: Collect Info Needed to Complete Attestation for your Plan - see Prior Slides

Prep Step 2: Have this Guidebook Handy in the event of Questions

Note: You are a reporting entity, reporting as a group health plan.

Filing Step 1: BEGIN: <https://hios.cms.gov/HIOS-GPCPA-UI>



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Filing the Attestation – Registering

BEGIN: <https://hios.cms.gov/HIOS-GPCPA-UI>

Step 1: Receive login credentials

- Click Don't have a code or forgot yours? to receive a Unique Code to Login
- Enter your email address and press Get my unique code



Code will be emailed to you within 10 minutes from submissions@cms.hhs.gov

Access the Gag Clause Prohibition Compliance Attestation Submission

* Enter e-mail address
* Enter the code that was sent via e-mail

Login to the system

Don't have a code or forgot yours?



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Filing the Attestation - Registering

BEGIN: <https://hios.cms.gov/HIOS-GPCPA-UI>

Step 1: Receive login credentials - continued

- While waiting for unique code - this screen will appear. (note this can also be used to access a 1st time or forgotten code)

Your unique code will be received from HIOS in an Email like this from cms.hhs.gov

- Code is good for 14 days
- Check Spam if not received in 10 min
- Do not request another code until after 10 min
- Code can not be transferred to others – unique to you



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Filing the Attestation – Starting!

BEGIN: <https://hios.cms.gov/HIOS-GCPCA-UI>

Step 2: Return to Home page and login with email address and unique code



Step 3: You should now be at your Dashboard. If you submitted last year for 2023, it will show your prior submission.



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Filing the Attestation Identifying Submitter & Entity

Step 4: Scroll down on the GCPCA Dashboard and Start the Attestation process by Clicking Submit Gag Clause Prohibition Attestation

Step 5: Complete Enter the Submitter's Contact Info. Scroll down - Where it asks "By what type of entity are you employed?" select (non-Federal) government group health plan (3rd box down). (Only the non government plans are ERISA.)

Click Save and Continue.



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Filing the Attestation – Identifying Attestor

Step 6: Complete Enter the Attestor's Contact Info.

If Submitter and Attestor are the same individual – click the box and press Save and Continue

OR

If the Attestor is a different individual – do NOT check the box, complete the requested information

press Save and Continue

Enter the Attestor's Contact Information



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Filing the Attestation – Reporting Entity Details

Step 7: Complete the Reporting Entity (Plan) Details

- A. Complete (Bracketed) Entity Info
 - Choose applicable type of plan:
 1. Non-federal government Plan (state and local govt entities; special taxing districts, constitutional officers, etc)
 2. ERISA Plan – For profit & not for profit * ERISA PLANS ONLY – ENTER THE PLAN NUMBER (best effort – FOUND ON FORM 5500)
 - If unknown – enter 000*
 3. Church Plan
 - *Do NOT choose health insurance issuer!
 - B. Select "NO" for Are you attesting for all provider agreements?
 - C. Select the provider agreements for which you are attesting. All benefits you have on your plan - Generally medical and pharmacy.
 - D. press Save and Continue



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Filing the Attestation Single vs Multiple Plans

Step 8: Complete Reporting Entity Details

• Respond NO that you are not submitting on behalf of more than one plan or issuer (multiple plan types under one issuer are generally a single submission)

* Note: Only Multiple entity submissions require the upload of the excel spreadsheet. This is not multiple entities on a plan, but rather multiple different plan sponsors (ex: TPAs, PBMs, and Insurance Carriers)*

• select Save and Continue

Complete attestation period.



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Filing the Attestation – Attester Hand Off

Step 9 – (If applicable) -Confirm the Attester's email address

Only appears when the Attester is DIFFERENT than the Submitter

- Verify address is entered correct
- Press Send email
- Attester receives a unique code (within 10 minutes) to login, attest, and complete the filing.

* Note: When Submitter and Attester are the same individual, Step 9 will be skipped entirely, and Submitter will be taken directly from Step 8 to Step 10 *



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Filing the Attestation – Review Submission

Step: 10 – Review Submission & Attest

Review your submission and attest

all information entered is correct as needed by pressing the Edit link to right of table section
ve and Continue once confirmed info is correct

Submitter's contact information		
Submission year	Submission year and last name	Submission year and last name
Submission year and last name	Submission year and last name	Submission year and last name
Entity	Entity	Entity

Attester's contact information		
Attester's name and last name	Attester's name and last name	Attester's name and last name
Attester's name and last name	Attester's name and last name	Attester's name and last name
Attester's name and last name	Attester's name and last name	Attester's name and last name

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Filing the Attestation – Attesting for the Entity

Step: 11 – Verify entity type and attest

Select box that reads "I am attesting on behalf of a group health plan, including non-federal governmental plans, and health insurance issuers offering group health insurance coverage".

Attest your submission by clicking attestation box (authority to bind) and typing signature (enter name exactly the same as the first and last name you registered)

Click SUBMIT (Green Button)

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Filing the Attestation – Attesting for the Entity

Step: 12 – Download Receipt

- Press Download Receipt button and save proof of filing for your records.
 - You will receive a PDF
 - If can't download pdf – take screenshot
- Press Return to Dashboard
- Confirm that the submission shows COMPLETE and print or save a copy

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Filing the Attestation – Tips & Tricks

- Tips & Tricks**
 - You can hit Save and Exit throughout filling out the Web Form and your form will show "In Progress" on your Dashboard. You can delete or edit prior to submission
 - It is imperative that signatures and emails be entered consistently for both the submitter and attester as applicable.
 - If you open a submission from the dashboard – must resubmit, Save and continue won't do anything (will show pending)
 - Reporting generally covers period of prior attestation to next attestation date: but need a report by 12/31 of each year.

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Filing the Attestation – Tips & Tricks

- Tips & Tricks**
 - Retiree only plans – no attestation requirement (per webinar moderator)
 - May see future regulations excepting HRA's from this attestation requirement – no concern – They are in non-enforcement pending this future clarifying regulations.
 - Help Desk: 1-855-267-1515
 - Help email: CMS_FEPS@cms.hhs.gov – enter GCPA in Subject line (Email is recommended over phone)
 - Answers to Questions not answered today will be send out to attendees and loaded on portal.

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Prescription Drug Reform

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SB 1550 – Deep Dive

• Who is Being Regulated?

- Applies to commercial health plans, self-insured plans, governmental plans (as well as PBMs, manufacturers and pharmacies)
- Vests Office of Insurance Regulation (OIR) with significant oversight authority over PBMs



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SB 1550 – Deep Dive

• What's in the Bill?

- PBMs required to obtain certificate of authority under insurance code
- Transparency standards:
 - Requires PBM disclosure of affiliation with pharmacies, insurance companies
 - Requires manufacturer reporting of increase in wholesale acquisition costs of Rx



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SB 1550 – Deep Dive

• What's in the Bill?

- Regulates contracts between PBMs and benefit plans:
 - Requires pass-through pricing
 - "Spread" pricing prohibited unless any difference passed through to plan
 - Requires 100% of rebates to be passed through to plan for purpose of offsetting cost-sharing/premiums (if contract delegates rebate negotiations to PBM)
- Regulates PBM contracts with pharmacies
 - Prohibits financial clawbacks
 - Requires PBM to offer appeal right to pharmacies



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SB 1550 – Deep Dive

• What's in the Bill?

- Prohibits various practices:
 - PBM cannot penalize pharmacies for disclosing information to patients regarding nature of treatment, risks, availability of alternatives, or disclosures to OIR
 - PBM cannot exclude pharmacies from networks based on standards more stringent than state/federal guidelines
 - Bans steering
 - Prohibits data sharing without participant consent
- Requires annual attestation from health plan affirming compliance



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SB 1550 – Deep Dive

• What's in the Bill?

- Provisions potentially impacting plan design
 - Prohibits "affiliate-only" networks
 - Bans mail-order-only mandates (optional mail-order programs still permitted, and mail-order still allowed if drug is unavailable at pharmacies)
 - Prohibits "fail-first" or "step therapy" requirements
 - Requires 60 day continuity of care period for certain formulary changes



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SB-204 Federal Prescription Drug Reporting

• What's in the Bill?

- Provisions potentially impacting plan design
 - Prohibits "affiliate-only" networks
 - Bans mail-order-only mandates (optional mail-order programs still permitted, and mail-order still allowed if drug is unavailable at pharmacies)
 - Prohibits "fail-first" or "step therapy" requirements
 - Requires 60 day continuity of care period for certain formulary changes
 - Expect email from carrier asking for your contribution and premium costs and TIN to be submitted



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Next Steps for Employers

- *How are Employers Responding?*
 - Confirm compliance with plan vendors
 - Submit attestation to Florida Office of Insurance Regulation (see sample provided) at PBMRreporting@florir.com



Questions?

Kate.granigard@gehringgroup.com

Kate.granigard@mybentek.com

Direct Phone: (561) 629-2001



gratitude

By a 4-Hourly report

The past few years of being
able to support our
clients, and the desire
to create business for them.





Summary:

The Affordable Care Act (ACA) created reporting requirements under Internal Revenue Code (Code) Sections 6055 and 6056. Under these rules, certain employers must provide information to the IRS about the health plan coverage they offer (or do not offer) to their employees. This information is provided by Applicable Large Employers (ALE) to their employees annually on Form 1095-C. Additionally, issuers including self-insured employers, provide plan participants a report of coverage on Form 1095-B or Form 1095-C, as applicable. These Forms are filed with the federal government, with a copy to the individual taxpayer each year, for the prior calendar year.

Electronic Reporting Requirement

Since inception, any reporting entity required to file at least 250 individual Form 1095 statements has been required to file electronically to avoid penalty. However, on Feb. 23, 2023, the IRS released a final rule implementing a law (Taxpayer First Act of 2019), which **lowers the 250-return threshold for mandatory electronic reporting to 10 individual information returns**. To calculate if employers must file electronically, employers must aggregate all their informational returns to be filed, including not only Forms 1094 and 1095, but also Forms W-2, and 1099's for example; and file electronically if the total of all information returns is more than 10. Due to the lowered threshold, only the smallest employers will be permitted to file using paper returns. This new requirement starts with the filing of the 2023 informational returns which will be filed in 2024. Accordingly, many employers who were able to file paper Form 1094/1095 returns in prior years, will now be required to complete their ACA reporting electronically starting in 2024.

Affected employers have two new considerations going forward regarding the filing of 1095 forms due to this new requirement:

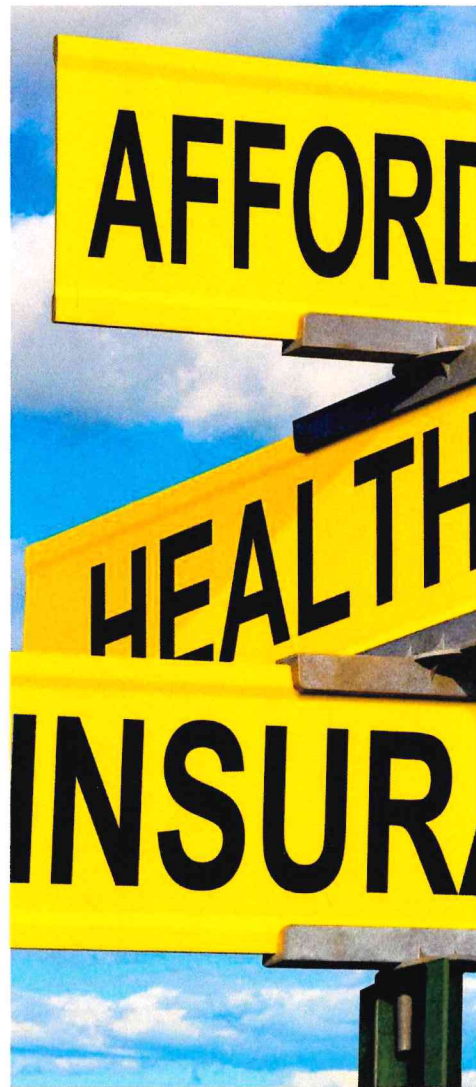
- Furnish Form 1095-C to your employees by **March 04, 2024**.
- File Forms 1094-C and 1095-C with the IRS by **February 28th, 2024** if filed by *paper*.
- File Forms 1094-C and 1095-C with the IRS by **April 1st, 2024** if filed *electronically*.

- This may affect the filing deadline for remitting the plans annual 1095 Forms. Please take note of this new requirement and respective deadlines and update your reminder calendars accordingly
- An electronic filing method/vendor should be selected in advance of the 2023 year-end to facilitate the required electronic filing requirement in early 2024.

Issuers, employers and other reporting entities generally use a third-party vendor to file electronically with the IRS on their behalf. As a result, these entities will not directly use the federally established reporting resource, the [AIR Program](#), themselves. However, if you have filed your ACA forms (1094/1095) on paper in the past and would like information regarding a reliable third-party vendor to perform your 2024 filing (for calendar year 2023) electronically, please contact Cindy Thompson at cindy.thompson@gehringgroup.com for partner and discounted pricing information. Please note that your current payroll vendor or ERP System may also provide this service, some of whom may require you to register with the AIR System. Please be sure to ask this question when vetting your vendor.

Waiver From Electronic Filing Requirement

A hardship waiver may be requested from the electronic filing requirement by submitting Form 8508, Application for Waiver from Electronic Filing of Information Returns, to the IRS. Reporting entities are encouraged to submit Form 8508 **at least 45 days before the due date of the returns, but no later than the due date of the returns**. The IRS does not process waiver requests until Jan. 1 of the calendar year the returns are due. Without an approved waiver, a reporting entity that is required to file electronically but fails to do so may be subject to a penalty of up to **\$290** per return (as adjusted annually) unless it can establish reasonable cause.



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Palm Beach Gardens, FL 33410



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Employers subject to Affordable Care Act (ACA) reporting under Internal Revenue Code Sections 6055 or 6056 should prepare to comply with reporting deadlines in early 2025.

For the 2024 calendar year, covered employers must:

- File returns with the IRS electronically by **March 31, 2025** (or by **February 28, 2025**, if filing on paper). Employers that file **at least 10 returns** during the calendar year must **file electronically**.
- Ensure that statements are furnished to individuals **upon request**, by Jan. 31 of the year following the calendar year to which the return relates or 30 days after the date of the request, whichever is later. Reporting entities **must give individuals timely notice** of this option, in accordance with any requirements set by the IRS. Reporting entities that do not wish to take advantage of this new furnishing method can provide the statements by **March 3, 2025**.

IMPORTANT DATES

Feb. 28, 2025

Paper IRS returns for 2024 must be filed by this date. Reporting entities can only file up to 10 returns on paper.

March 3, 2025

Reporting entities should provide statements by this date, noting that we are recommending you continue to mail them for the 2024 reporting year due to the lack of clarity regarding the definition of “timely notification” from the IRS (more details below).

March 31, 2025

Electronic IRS returns for 2024 must be filed by this date.

Covered Employers

The following employers are subject to ACA reporting:

- Employers with **self-insured health plans** (Section 6055 reporting)
- **Applicable large employers (ALEs)** with either fully insured or self-insured health plans (Section 6056 reporting)

ALEs are employers with **50 or more full-time** employees (including full time equivalent employees) during the preceding calendar year. Note that ALEs with self-funded plans are required to comply with both reporting obligations. However, to simplify the reporting process, the IRS allows ALEs with self-insured plans to use a single combined form to report the information required under both Sections 6055 and 6056.

Section 6055 and 6056 Reporting

- Section 6055 applies to providers of minimum essential coverage (MEC), such as health insurance issuers and employers with self-insured health plans. These entities generally use Forms [1094-B](#) and [1095-B](#) to report information about the coverage they provided during the previous year.
- Section 6056 applies to ALEs—generally, those employers with 50 or more full-time employees, including full-time equivalents, in the previous year. ALEs use Forms [1094-C](#) and [1095-C](#) to report information relating to the health coverage that they offer (or do not offer) to their full-time employees.

Employers reporting under both Sections 6055 and 6056—specifically, ALEs with self-insured plans—use a combined reporting method by filing Forms 1094-C and 1095-C.

Annual Filing Deadline

Generally, forms must be filed with the IRS annually, no later than **March 31** (or **February 28**, if filing on paper) of the year following the calendar year to which the return

relates. Employers may receive an automatic 30-day extension to file with the IRS by completing and filing [Form 8809](#) by the due date of the return. Additional extensions of time to file may also be available under certain hardship conditions.

Individual Statements Upon Request

Under the original reporting rules, reporting entities had to furnish statements annually to each individual who was provided with MEC (under Section 6055) and each of the ALE's full-time employees (under Section 6056). These statements were provided using Forms 1095-B and 1095-C; however, the IRS allows Forms 1095-B to be provided to individuals upon request if certain requirements are satisfied.

Under this alternative manner of furnishing Forms 1095-B, reporting entities must:

- Post a clear and conspicuous notice on its website stating that responsible individuals may receive a copy of their statement upon request. The notice must include an email address, a physical address to which a request may be sent and a telephone number to contact the reporting entity with any questions.
- For 2024 statements, reporting entities must post the notice by March 3, 2025, and must retain the website notice through Oct. 15, 2025.

The [Paperwork Burden Reduction Act](#) codifies this alternative manner of furnishing Forms 1095-B, and extends this flexibility to furnishing Forms 1095-C as well. Accordingly, **reporting entities are no longer required to send Forms 1095-B and 1095-C to covered individuals unless a form is requested.**

Reporting entities must give individuals timely notice of this option, in accordance with any requirements set by the IRS (**while the IRS has not outlined what constitutes “timely notice”** of the option to request Forms 1095-C, the requirements regarding the alternative manner of furnishing Forms 1095-B still apply). Requests must be fulfilled by **January 31 of the year following the calendar year to which the return relates or 30 days after the date of the request**, whichever is later. Reporting entities that do not wish to take advantage of the new furnishing method can provide the statements by March 3, 2025. Given this uncertainty, we recommend that employers continue mailing Form 1095-C to employees for the 2024 reporting year. Also, reporting entities should continue to comply with applicable state reporting requirements.

In addition, the [Employer Reporting Improvement Act](#) provides that statements can be provided **electronically** to individuals if they have affirmatively consented “at any prior time” (unless they have revoked such consent in writing).

Electronic Filing

The electronic filing threshold for returns required to be filed on or after January 1, 2024, is **10 or more returns** (originally, the threshold was 250 or more returns). The instructions for 2024 returns (filed in 2025) provide the following clarifications and reminders:

- The 10-or-more requirement applies in the **aggregate** to certain information returns. Accordingly, a reporting entity may be required to file fewer than 10 of the applicable Form 1094 and 1095, but still have an electronic filing obligation based on other kinds of information returns filed (e.g., Forms W-2 and 1099).
- The electronic filing requirement does not apply to those reporting entities that request and receive a hardship waiver; however, the IRS encourages electronic filing even if a reporting entity is filing fewer than 10 returns.
- The formatting directions in the instructions are for the preparation of paper returns. When filing forms electronically, the formatting set forth in the “XML Schemas” and “Business Rules” published on IRS.gov must be followed rather than the formatting directions in the instructions. For more information regarding electronic filing, see IRS Publications [5164](#) and [5165](#).

Electronic filing is done using the ACA Information Returns (AIR) Program. The IRS has provided guidance on electronic reporting through its [AIR Program main page](#), but this guidance is generally very technical and intended for software developers and other entities that plan on providing electronic reporting services. Nonetheless, it can provide useful information on standards and procedures for returns transmitted through the AIR Program.

Questions?

Contact Cindy Thompson, Vice President of Operations
Cindy.Thompson@gehringgroup.com



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WEST PALM BEACH

Human Resources

August 25, 2023

Kurt Gehring
The Gehring Group
3500 Kyoto Gardens Drive
Palm Beach Gardens, FL 33410

Dear Kurt,

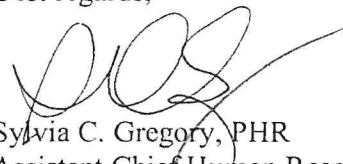
It is with great pleasure that I have the opportunity to recommend the Gehring Group for all services related to support of a self-funded Employee Health Benefits Plan. During the City's long relationship with the Gehring Group, they have provided a superior level of employee benefit consulting expertise with a high priority on satisfaction, cost reduction and customer service. g

As part of the City of West Palm Beach's employee benefits cost saving strategy, the Gehring Group has guided the City through the RFP design, evaluation, selection and implementation of our health plan and our onsite health clinic. Our Gehring Group team facilitates annual meetings with our insurance providers and TPAs, monitors trends and provides cost savings recommendations. The addition of an employee clinic has proven to be an asset in attracting talented employees, cost savings to the employees and retirees, and it provides a great return on investment for the City.

The City has always had great confidence with the Gehring Group and their ability to problem solve and bring forth ideas that help the City to be a top choice for employees due the benefits it offers.

I am pleased to recommend the Gehring Group to any organization for employee benefits and onsite clinic consulting services. If you have any questions, please feel free to contact me at (561) 494-1021.

Best regards,



Sylvia C. Gregory, PHR
Assistant Chief Human Resources Officer



August 30, 2023

Kurt Gehring
The Gehring Group
3500 Kyoto Gardens Drive
Palm Beach Gardens, FL 33410

Dear Kurt,

I am pleased to provide a recommendation letter for the Risk Strategies for all you have done and continue to do in support of our self-funded Employee Health Benefits and our Property and Casualty Plans. The County has enjoyed the long-standing relationship and outstanding support of our Employee Health Plan and our two Employee Health Clinics. Charlotte County regards your company as an extension of our staff and our success is a direct reflection of you and your entire team.

As part of Charlotte County's employee benefits program your team has helped us to control costs, perform RFP design, evaluation, and implementation, coordinated insurance committee meetings, provided us with the knowledge and expertise to open two employee health clinics. The first clinic opened in 2009 has provided us with excellent care for our plan members and proven to be an integral part of our cost savings strategy.

The Property and Casualty Self Insured program partnership first was solidified by the guidance provided navigating through the Hurricane Charley response, recovery and again with Hurricane Ian, and worked directly with our carriers to maximize their financial involvement. Your staff's technical and institutional knowledge in this arena continue to this day.

I am pleased to provide the County's recommendation letter in support of the Risk Strategies for employee benefits and onsite clinic support in addition to our Self-Insured Property and Casualty program.

If you have any questions, I can be reached at 941.743.1244.

Sincerely,

Jennifer Bullistron

Jennifer Bullistron
Risk/Benefits Coordinator

THE SCHOOL BOARD OF MARTIN COUNTY, FLORIDA

1939 SE Federal Highway • Stuart, Florida 34994 • Telephone (772) 219-1200 Ext: 30100 • Facsimile: (772) 219-1230



JULIE SESSA, ARM, SHRM-SCP, Assistant Superintendent of Human Resources

SHANNON ARMSTRONG, Director of Talent Acquisition

MAURICE G. BONNER, Director of Human Resources

DON CALDERONE, ARM, Director of Risk Management & Employee Benefits

August 21, 2023

RE: Recommendation for Gehring Group Insurance Brokers & Consultants

To Whom It May Concern:

Please accept this letter of reference as a formal recommendation in support of the Gehring Group. The Martin County School Board has contracted with the Gehring Group for more than 20 years to assist in obtaining, maintaining, and administering a wide range of employee benefits, most notably our medical insurance.

The Martin County School Board currently has a fully insured program, including medical, dental, vision, and life insurance as well as long-term and short-term disability insurance, an employee assistance program, flexible spending accounts, and other supplemental insurance. The Gehring Group has provided us with skilled, accurate and timely benefit analysis, wellness program support, suggested benefit design changes, and consultant with us on numerous regulatory and administrative matters.

It is my profound pleasure to work with both Mr. Dustin Kuehn, a senior benefits consultant with the firm, and his account service team. Their dedication to our school district is strong, the relationships are sincere, and the technical support is outstanding.

Contact me anytime if I can be of further assistance to you.

Sincerely,

Julie L. Sessa, ARM, SPHR, SHRM-CP
Assistant Superintendent of Human Resources

Michael Maine, Superintendent

School Board Members • Michael DiTerlizzi • Marsha Powers • Amy Pritchett • Christia Li Roberts • Jennifer Russell

"Educate all Students for Success"

PALM BEACH COUNTY
SHERIFF'S OFFICE

RIC L. BRADSHAW, SHERIFF



October 9, 2018

Ladies & Gentlemen:

The Palm Beach County Sheriff's Office has enjoyed a long relationship with the Gehring Group, as they have been our Agent of Record for Employee Benefits for over 20 years. During this extensive period of service, Gehring Group has provided outstanding service to our organization. They are highly regarded by me and my staff and have been a source of unqualified support and expertise to us throughout the years.

It is with pleasure that I recommend Gehring Group to other organizations. Please do not hesitate to call for further information.

Sincerely,

A handwritten signature in blue ink, appearing to be "R. Bradshaw".

Ric L. Bradshaw
Sheriff



SARASOTA COUNTY SHERIFF'S OFFICE

FAIRNESS - INTEGRITY - RESPECT - SERVICE



SHERIFF KURT A. HOFFMAN

COLONEL BRIAN WOODRING, CHIEF DEPUTY

June 20, 2022

Mr. Kurt Gehring
Gehring Group
3500 Kyoto Gardens Drive
Palm Beach Gardens, FL 33410

Dear Mr. Gehring:

We have partnered with the Gehring Group for over twelve years and would like you to know the services you and your staff have provided, specifically over the last three years have been invaluable. The decision we made three years ago to manage our own program was not made lightly. We were faced with multiple decisions outside of our comfort zone and the expertise and guidance we received from the Gehring Group equipped us for such an undertaking.

On several occasions, your team have dropped everything and come to our offices, answered calls and emails and helped us navigate the tasks at hand. Your staff was able to ask the right questions, examine complex data, and provide us with clear and concise information that vitally impacted our organization and employees. I am confident that we would not have been as successful procuring and creating our own program if we had not engaged your firm. This could not have been accomplished without the consult we received from your dedicated and knowledgeable staff.

If you have any current projects that you wish to list the Sarasota County Sheriff's Office as a reference, you have my express permission to do so. Please accept this letter with my appreciation for what you and your staff did for us. We look forward to continued collaboration with you for the betterment of our employees and agency.

Respectfully,

Kurt A. Hoffman, Sheriff
Sarasota County, Florida

6010 CATTLERIDGE BOULEVARD - SARASOTA, FLORIDA 34232 - WWW.SARASOTASHERIFF.ORG - 941.861.5800

ACCREDITED FULL SERVICE LAW ENFORCEMENT AGENCY - EQUAL OPPORTUNITY EMPLOYER





Benefits Consulting & Broker Services – RFP 2025-07
Selection Committee Interview
May 19, 2025, 3:30 pm

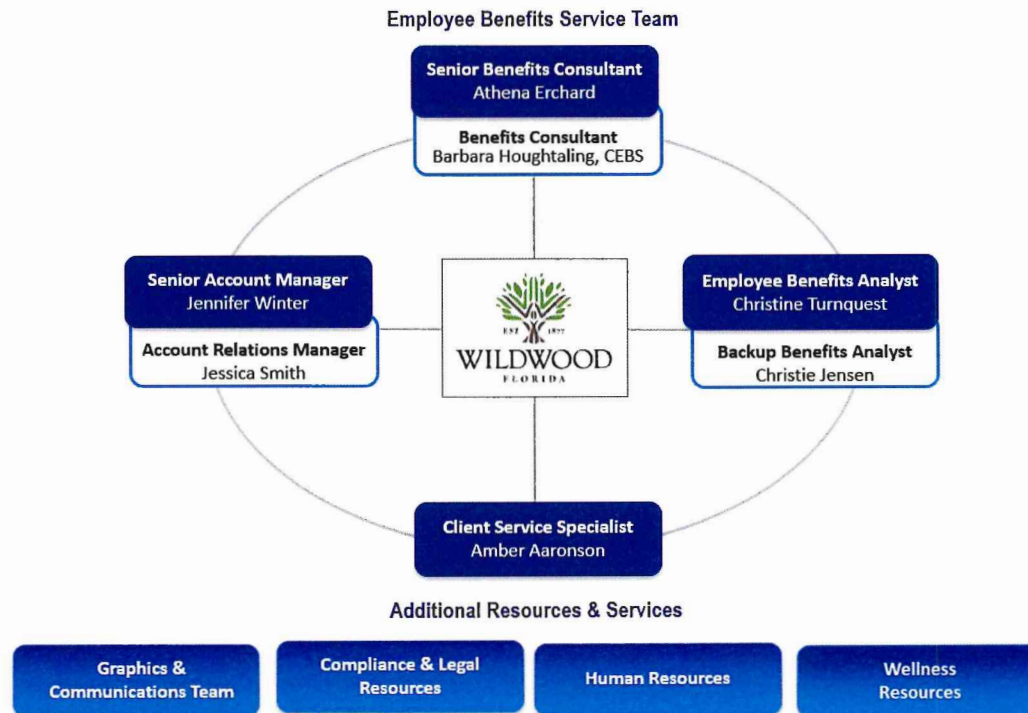
Why Gehring Group - Risk Strategies?

- 9th Largest Independent & Privately Owned Brokerage Agency
 - **Laser focused on the best interest of your organization, employees & retirees, not stockholders**
 - 98.6% Client Retention Rate
 - Licensed, non-commissioned team members
 - Top Tier Carrier/TPA Recognition
 - Tenured leadership & team
- Full transparency
- Experience working with committees, unions, decision makers & retirees
- Local Presence with National Expertise & Resources
- Where Others See Roadblocks, We See Opportunity!

Why Gehring Group - Risk Strategies?

- **National Public Sector *Center of Excellence*: Gehring Group**
 - Over 30 Years Sole Focus supporting Government Entities and their members
 - Depth of Team Experience & Support
 - Main Office Palm Beach Gardens – team members located throughout Florida
 - Backup team members
 - Centralized database
 - 140+ Employee Benefits Public Sector Clients
 - 56% Fully Insured, 38% Self Funded, 2% Minimum Premium, 4% Graded Funding, 1% Level Funding
 - Real-time Benchmarking & Best Practices
 - Unique Understanding Of Challenges & Solutions, Specific to Public Sector
 - Trusted consultant to 66 Municipalities
 - Innovative Solutions

Team Approach



Consultant Scope of Services

- **Comprehensive & All Inclusive**

- Benefit Consulting - Proactive & Strategic Approach
 - Timeline of expectations
 - Best practices
- Analytic Services - Cost Management
 - Independent budget projections
 - Data analysis
 - Effective renewal negotiations
 - Request for proposal
- Account Management
 - Implementation & open enrollment
 - Staff & member advocacy
 - Customized communication materials
- Ongoing Program Administration Planning & Support
- Education – Leadership, Staff & Members
- Legislative Compliance



Services & Resources – No Additional Cost

- Employee Navigator Online Enrollment & Administration System
- Member Advocacy - City Specific Member Email & 800#
- Custom Graphics - Printed and/or virtual
- Technology:
 - CAVU – Public Sector Benchmarking
 - Mineral Online HR Tool
- Wellness Planning & Support – Medical, Mental Wellness & Financial
- Human Capital, Legal & Actuarial Resources
- Onsite Meeting & Open Enrollment Attendance
- Public Sector Summit
- Networking & Roundtable Participation
- Ongoing Seminars, Education and Training
 - Staff, Leadership, Employees & Retirees



Planning - Short & Long Term Needs & Goals

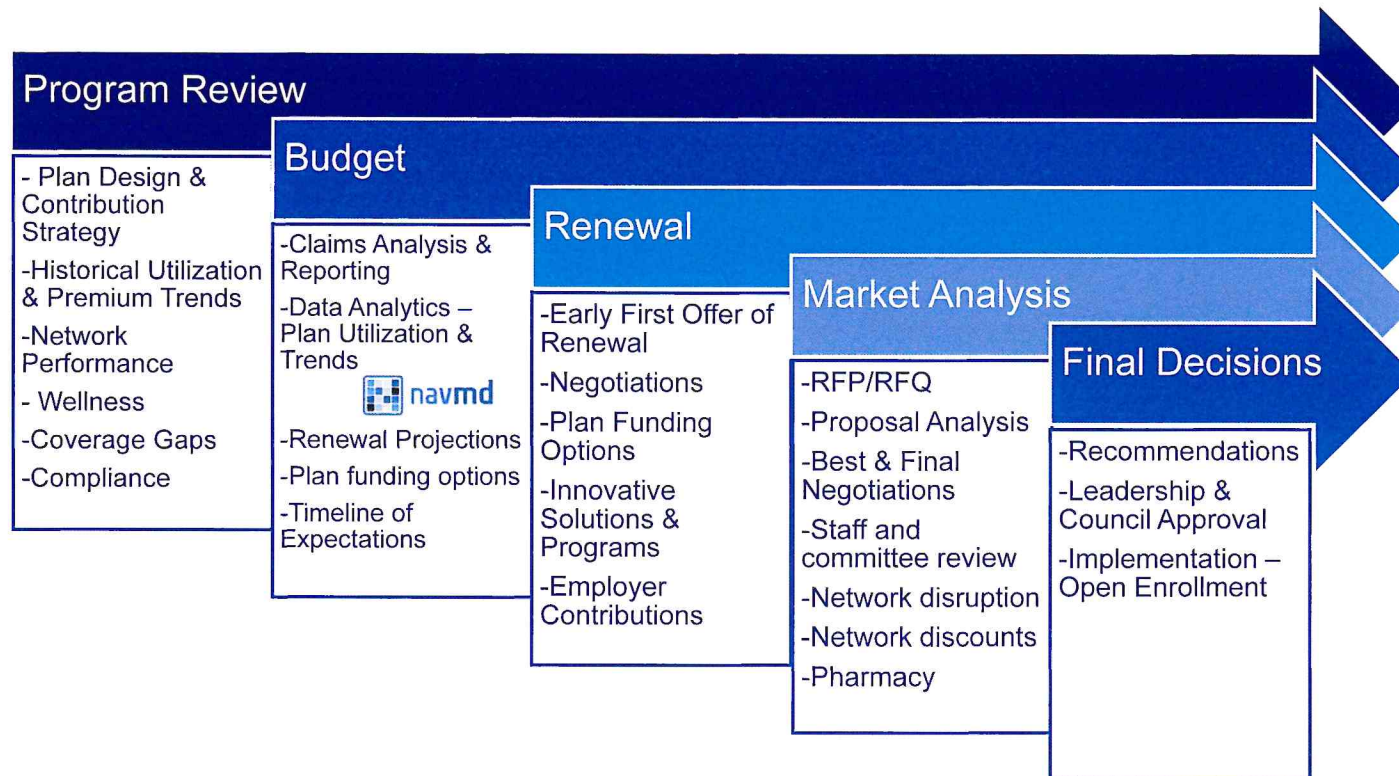
- Onboard Meeting
 - Review of goals, needs, past challenges and celebrations
 - Internal processes
 - Contractual review
- Initial & Ongoing Planning Sessions
 - Obtain historical plan information from carriers and vendors
 - Establishing a timeline of expectations
 - Employee survey
 - Budget
 - Union commitments
 - Renewal/RFP
 - Approval process – leadership/elected officials
 - Compliance review & planning session
 - Market & product options
 - Sharing of best practices

Coverage	Carrier	Renewal Date
Medical ASO	Health Now Administrative Services (Highmark Network)	January 1, 2026
Pharmacy Benefits Manager	Rx Talents	January 1, 2026
Reinsurance	Companion	January 1, 2026
Dental	TBD	January 1, 2026
Vision	VBA	January 1, 2026
Life and AD&D – Basic & Voluntary	TBD	January 1, 2026
Short-Term Disability	TBD	January 1, 2026
Long-Term Disability	TBD	January 1, 2026

Proposed Schedule of Activities	
Date	Action
January – March 2025	Client Onboarding and Compliance Checklist Review Meetings
June 23, 2025	Pre-Renewal and RFP Planning Meeting
June 30, 2025	RSC to Complete RFP Draft
July 9, 2025	County Staff to Approve RFP Draft
July 9, 2025	County Staff to Provide Census for RFP
July 14, 2025	RFP Finalized and Released by RSC
July 28, 2025	Deadline to Receive Carrier Questions from RFP
August 1, 2025	Responses to Questions Issued by RSC
August 13, 2025	Proposals and Renewals Due to RSC
August 14 – 21, 2025	Proposals and Renewals Evaluated by RSC
August 22, 2025	RSC to Present Initial RFP and Renewal Offers to Staff
August 27 – 28, 2025	Finalist Presentations Conducted at County (If Necessary)
August 29, 2025	RSC to Request Best and Final Offers
September 3, 2025	Best and Final Offers Due to RSC
September 3, 2025	RSC to Present Best and Final Offers to County Staff
September 10, 2025	County Staff to Provide Final Recommendations
September 18, 2025	County Commission Meeting to Approve Staff Recommendations
September 19 – October 10, 2025	Open Enrollment Preparation
October 13 – 17, 2025	Open Enrollment Meetings
January 1, 2026	Plan Effective Date

*Dates outlined herein are subject to change based on the goals of the client and insurance carrier cooperation.

Renewal & RFP Process



Real-Time Benchmarking



FREE! BENCHMARKING
FOR PUBLIC SECTOR

**Compare Your Benefit Data to Other
Public Sector Entities in Real Time**

1. Begin by visiting cavu4u.com, register, and create an account.
2. Enter your organization's plan data and start running aggregate reports!
3. Select specific entities for comparison and add them to your "Cavunity" to personalize your benchmark reporting.
4. With the push of a button, you'll be able to see how your benefits compare to other public sector entities in your Cavunity. It's that simple!

800.244.3696
cavu4u.com

Watch This
Testimonial
Video!



Public Sector Only

- Employee Benefit Programs & Costs
- By:
 - Type of Entity
 - Municipality
 - County
 - Constitutional Office
 - Special Taxing District
 - Region
 - State

*Included In Proposed Scope of Services

Regulatory Compliance



Legislative & Compliance Update Newsletters



Client Portal, Mental Health First Responder Portal & Mineral™



Client Seminars & Webinars



Annual Onsite Compliance Checklist Review & Planning



Insurance Education, Innovation & Excellence Summit



Affiliated with:

- Council for Insurance Agents & Broker
- NABIP (National Association of Health Underwriters)
- Seyfarth Shaw & Lewis Longman Walker

Situational Problem Solving –Win/Win Solutions



Effective Communication & Education

- Education Meetings:
 - In person
 - Virtual
 - Recorded Presentation
 - White Board Videos
 - Retiree focus
- Custom Communication
 - Open enrollment booklet & flip book
 - Posters
 - Flyers
 - Email

During these unprecedented times... We are working hard to support you while **keeping everyone safe!**

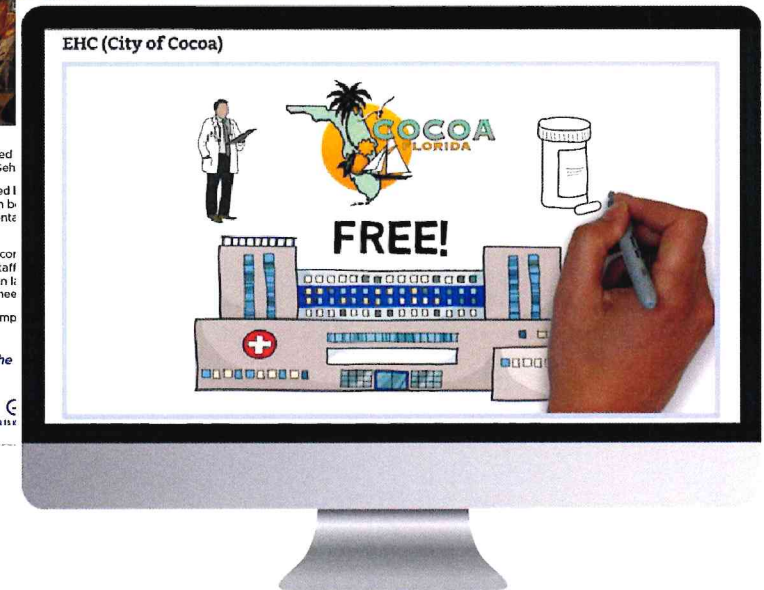


This year benefit education meetings may require a different

- **Live Virtual Open Enrollment Presentation** - prepared and presented scheduled meeting times with your staff and presented live by your Gehring Group Account Manager.
- **Pre-recorded Open Enrollment Presentation** - prepared and presented to share with staff through your internal intranet or email. This option can be convenient on laptops, tablets, smart phones, or desktops. This presentation also serves as an additional resource for future New Hire Orientation meetings.
- **Pre-recorded Voiceover PowerPoint Presentation** - prepared pre-recorded presentation will be sent as a safe link to share with staff as a scheduled meeting or posted for accessibility when convenient on laptops, tablets, smart phones, or desktops. This presentation also serves as an additional resource for future New Hire Orientation meetings.
- **Bentek Admin Assist** - a new and convenient virtual option to assist employees as a scheduled appointment meeting, individual assist format.

Contact your Gehring Group Account Manager to discuss the options.

GEHRING GROUP
EMPLOYER BENEFITS | RISK STRATEGIES



Wellness Strategy & Planning

Customized Wellness Programs

- Negotiate Wellness Funds/Programs
- Integrate Existing Programs & Coordinate Disease Management
- Coordinate Prevent & Lifestyle Change Programs

40+ Active Programs

Planning & Implementation

Wellness in a Box

EEOC & ADA Compliance

Mental Health – Substance Use

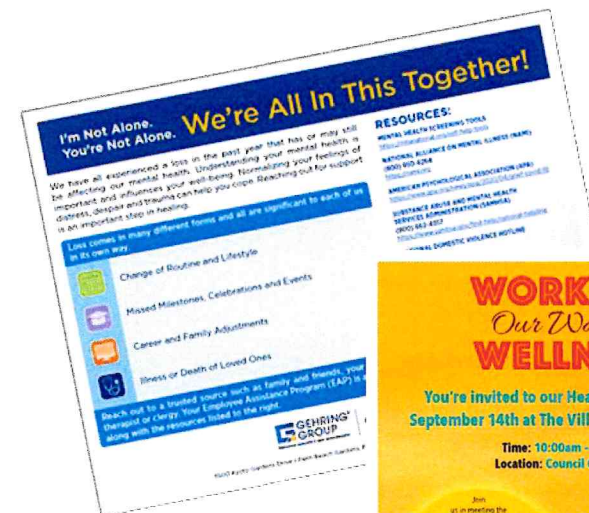


Wellness Strategy & Planning

- Wellness Subject Matter Experts
- Negotiate Wellness Funds/Programs
- Conduct Employee Surveys
- Integrate Existing Disease Management Programs
- Mental Health First Aid Training
- Coordinate Preventive & Lifestyle Change Programs
- Monthly newsletter and wellness calendar
- Employee Communication
- EEOC and ADA Compliance

Above and Beyond

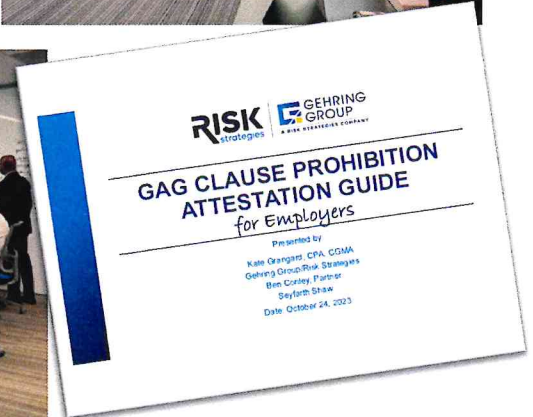
- Identify gaps and understanding obstacles
- Develop, communicate, implement & support to achieve an EFFECTIVE program



Benefit Administrator Workshops & Webinars

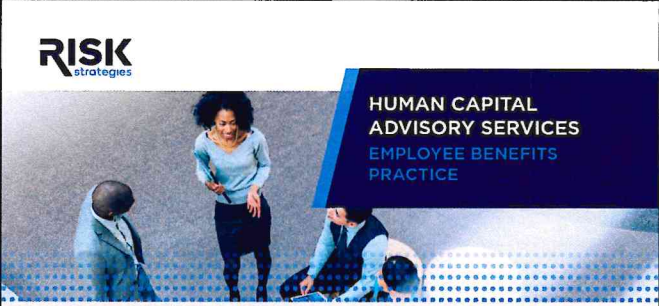
Education & Certifications

- White Paper & Client Specific Guidance
- Client & Essential Worker Roundtables
- Health Care Reform/ACA
 - 1094/1095 Assistance
- Educational Webinars
 - Gag Clause Prohibition Attestation
 - Mental Health Parity
 - Understanding Recent Changes To Affecting Creditable Coverage



Human Capital Advisory Services

- Risk Strategies Human Capital Advisory Services
- HR Practitioners - Vast Knowledge & Experience Across The Spectrum Of Human Resource Needs:
 - Full breadth of expertise, including recruiting, HR tech, compensation, and benefits
 - Fill in gaps where needed
 - Eliminates administrative burden, enabling your team to focus on the bigger picture



RISK
strategies

**HUMAN CAPITAL
ADVISORY SERVICES
EMPLOYEE BENEFITS
PRACTICE**

The heartbeat of every organization lies in Human Resources. Yet, it's easy for HR teams to lose sight of longer-term strategic projects with heavy administration needs, constantly evolving business and talent strategies, and an increasingly complicated regulatory environment.

APPROACH

Risk Strategies Human Capital Advisory Services transform Human Resources (HR) functions into the opportunities that help your organization drive growth, productivity, and employee engagement through:

- Advisory services with SHRM/HRCI accredited professionals
- Outsourced human capital services and scope-based projects
- Proactive recruitment strategies and talent acquisition services
- Customized learning and development programs to support talent initiatives

PARTNER WITH OUR EXPERTS

Risk Strategies Human Capital Advisory Services is comprised of HR accredited consultants with vast knowledge and extensive experience across the spectrum of HR needs.

- Full breadth of expertise including recruiting, HR tech, compensation and benefits
- Fill in gaps on topic expertise where your team may not have it
- Eliminates administrative burden, enabling focus on strategic projects

Human Capital Advisory Services

- Support When You Need It
 - Audits, compliance, policy development
 - Employee relations
 - Performance management
 - Culture/employee experience
- Total Rewards & Compensation benchmarking
- Talent Acquisition strategy
- HCM technology advising
- Learning & Development
 - Customizable trainings
 - Content creation
 - Interactive activities
 - Team building
 - Focus groups



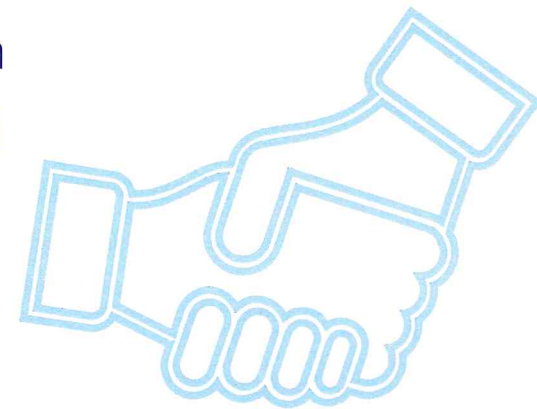
Employee Benefits Moving Forward

- Staff/Leadership Additional Support & Tools – Multi Generational Needs
 - Market product & knowledge
 - New legislation
- Employee/Retiree Contributions & Incentives
- Customized & Tax Efficient Benefits
- Direct Network Contracting – Health Center/Clinic
- Artificial Intelligence
- Medical and Pharmacy Benefit Management – Programs & Costs
 - Contract terms, pharmacy rebates, transparency rules
- Specialty Care Programs
- Wellness: Physical, Financial & Mental Health
- Product offerings
 - LTC, fertility & menopause benefits, child disability, eldercare, etc.

Why Risk Strategies Public Sector COE?



- Built To Support Public Sector
- Caring Partner With National Leverage
- Expertise In All Areas of Your Benefit Program
- Proactively Managed Deliverables & Planning
- Innovative solutions
- Dedicated year-round support
- All Inclusive Scope of Services
- Measurable and Proven Results
- Long-term Solutions & Relationships



Questions?

**“Thank You For.....
Sticking Your
Neck Out Everyday!”**

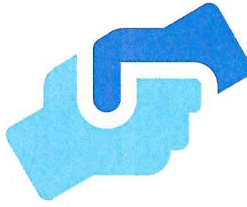


*Our Why*_____

**to inspire
our communities
to envision
and embrace
new possibilities**

PUBLIC ENTITY CLIENTS

Atlantis, City of	Marco Island, City of
Boca Raton, City of	Margate, City of
Boca Raton Housing Authority	Martin County BOCC
Boynton Beach, City of	Martin County School District
Brooksville, City of	Martin County Sheriff's Office
Broward College	Monroe County BOCC
Cape Coral, City of	Naples, City of
Career Source Palm Beach County	Nathan Benderson Park Conservancy
Central Florida Expressway Authority (LYNX)	North Palm Beach, Village of
Charlotte County BOCC	North Port, City of
Children's Services Council of Palm Beach County	Oakland Park, City of
Citrus County BOCC	Ocean Ridge, Town of
Clearwater, City of	Okaloosa County BOCC
Clerk & Comptroller, Palm Beach County	Oldsmar, City of
Clewiston, City of	Orange County Tax Collector
Cocoa, City of	Orange County Sheriff's Office
Cocoa Beach, City of	Osceola County Sheriff's Office
Coconut Creek, City of	Osceola County Tax Collector
Cooper City, City of	Oviedo, City of
Coral Gables, City of	Pahokee, City of
Coral Springs, City of	Pahokee Housing Authority
Dania Beach, City of	Palm Bay, City of
Davie, Town of	Palm Beach County Sheriff's Office
Deerfield Beach, City of	Palm Beach Gardens, City of
Delray Beach, City of	Palm Beach, Town of
Delray Beach Housing Authority	Palm Beach Shores, Town of
Dunedin, City of	Palm Harbor Fire Rescue District
Estero Fire & Rescue District	Palm Springs, Village of
Estero, Village of	Parkland, City of
Fellsmere, City of	Parrish Fire District
Flagler County Sheriff's Office	Pasco County Clerk of Circuit Court & Controller
Florida Keys Aqueduct Authority	Pasco County Sheriff's Office
Florida PACE Funding Agency	Pinellas County Housing Authority
Florida Sheriff's Association	Pinellas County Sheriff's Office
Fort Lauderdale, City of	Pinellas Suncoast Fire and Rescue
Fort Myers, City of	Pinellas Suncoast Transit Authority
Fort Myers Beach Fire Control District	Pompano Beach, City of
Gainesville, City of	Port of Palm Beach
Greenacres, City of	Port St. Lucie, City of
Gulfstream, Town of	Rockledge, City of
Hernando County BOCC	Royal Palm Beach, Village of
Hernando County School District	Sanibel, City of
Highlands County BOCC	Sarasota County Sheriff's Office



FREE! BENCHMARKING FOR PUBLIC SECTOR

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800.244.3696
cavu4u.com

Watch This
Testimonial
Video!



HUMAN CAPITAL ADVISORY SERVICES

EMPLOYEE BENEFITS PRACTICE

The heartbeat of every organization lies in Human Resources. Yet, it's easy for HR teams to lose sight of longer-term strategic projects with heavy administration needs, constantly evolving business and talent strategies, and an increasingly complicated regulatory environment.

APPROACH

Risk Strategies Human Capital Advisory Services transform Human Resources (HR) functions into the opportunities that help your organization drive growth, productivity, and employee engagement through:

- Advisory services with SHRM/HRCI accredited professionals
- Outsourced human capital services and scope-based projects
- Proactive recruitment strategies and talent acquisition services
- Customized learning and development programs to support talent initiatives

PARTNER WITH OUR EXPERTS

Risk Strategies Human Capital Advisory Services is comprised of HR accredited consultants with vast knowledge and extensive experience across the spectrum of HR needs:

- Full breadth of expertise including recruiting, HR tech, compensation and benefits
- Fill in gaps on topic expertise where your team may not have it
- Eliminates administrative burden, enabling focus on strategic projects

I'm Not Alone. We're All In This Together!

Many of us are facing daily challenges that can be stressful, overwhelming and emotional to ourselves and those around us. Understanding your mental health is important and influences your well-being. Normalizing your feelings of distress, despair and trauma can help you cope. Reaching out for support is an important step in healing.

Healthy Ways to Cope With Stress



CONNECT WITH YOUR COMMUNITY, with others, talk to people you trust about your concerns and how you are feeling.



TAKE BREAKS from watching, reading or listening to social media and the news.



TAKE CARE OF YOUR BODY: eat healthy, exercise, get plenty of sleep and avoid excessive alcohol and substance use.



MAKE TIME TO UNWIND and participate in activities that you enjoy with the people you love.

Reach out to a trusted source such as family and friends, your doctor, therapist or clergy. Your Employee Assistance Program (EAP) is available along with the resources listed to the right.

RESOURCES:

NATIONAL CRISIS TEXT LINE: Text HOME to 741741

NATIONAL SUICIDE PREVENTION HOTLINE
(800) 273-8255

MENTAL HEALTH SCREENING TOOLS
<https://mhanational.org/self-help-tools>

NATIONAL ALLIANCE ON MENTAL ILLNESS (NAMI)
(800) 950-6264
<https://nami.org>

AMERICAN PSYCHOLOGICAL ASSOCIATION (APA)
<https://www.apa.org/news/apa/2020/04/grief-covid-19>

SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION (SAMHSA)
(800) 662-4357
<https://www.samhsa.gov/find-help/national-helpline>

NATIONAL DOMESTIC VIOLENCE HOTLINE
(800) 799-7233
<https://www.thehotline.org>

VICTIM CONNECT RESOURCE CENTER
(855) 484-2846
<https://victimconnect.org/resources/national-hotlines>

AMERICAN FOUNDATION FOR SUICIDE PREVENTION
<https://afsp.org/taking-care-of-your-mental-health-in-the-face-of-uncertainty>



3500 Kyoto Gardens Drive | Palm Beach Gardens, Florida 33410 | 800.244.3696 | gehringgroup.com

Wellness Resources to Help You Stay Healthy

Mental Health and Wellness Resources

PODCASTS

How to Handle Coronavirus Anxiety | Dan Harris: 10% Happier Podcast

- Find this podcast on the podcast resource tool of your choice
- Click [HERE](#) to listen on Spotify

Parenting in a Pandemic | Dan Harris: 10% Happier Podcast

- Find this podcast on the podcast resource tool of your choice
- Click [HERE](#) to listen on Spotify

INSIGHT TIMER (App and Website) - Free guided meditation & mindfulness practices available <https://insighttimer.com/>

CDC: Mental Health and Coping During COVID-19 (Website)

<https://www.cdc.gov/coronavirus/2019-ncov/prepare/managing-stress-anxiety.html>

AMERICAN FOUNDATION FOR SUICIDE PREVENTION: Taking Care of Your Mental Health in the Face of Uncertainty <https://afsp.org/taking-care-of-your-mental-health-in-the-face-of-uncertainty/>

YOUR MENTAL HEALTH & WELL-BEING (APA): How to Maintain your Health & Wellness & Other Resources <http://workplacementalhealth.org>; click [HERE](#) to read

Exercise Resources

FITNESS BLENDER (Website & YouTube Channel)

- www.fitnessblender.com; click [HERE](#) to watch on YouTube
- Full length exercise videos with qualified personal trainers
- Search by length, difficulty, exercise type, muscles used, calorie burn and more

POP SUGAR FITNESS (Website & YouTube Channel)

- www.popsugar.com/workouts; click [HERE](#) to watch on YouTube
- Full length exercise videos with qualified personal trainers
- Filter by duration, level of difficulty and type of session

ORANGE THEORY ONLINE WORKOUTS (Website)

- <https://www.orangetheory.com/en-au/member-communication-regarding-coronavirus/>
- Daily 30-minute workout

Child and Family Specific Resource

ACTION FOR HEALTHY KIDS, COVID-19 (Website)

<https://www.actionforhealthykids.org/resources-for-schools-and-families-during-covid-19-coronavirus/>



Simple Things to Keep You Healthy

- 1. Drink your water!** Aim for at least 64oz of water per day
- 2. Get your sleep!** Aim for 7 - 9 hours of sleep most nights of the week
- 3. Wear sunscreen!** Aim to use broad spectrum SPF 15 or higher, reapply every 2 hours
- 4. Get some fresh air!** Aim for at least 20 minutes outside each day



Navigating the Medicare Maze

Medicare enrollment is not the same for everyone!

It's important to know how Medicare works with your employer group health plan whether you are still working or planning to retire.

BE PROACTIVE!

Before you decide to enroll (or not) here are some questions to think about...

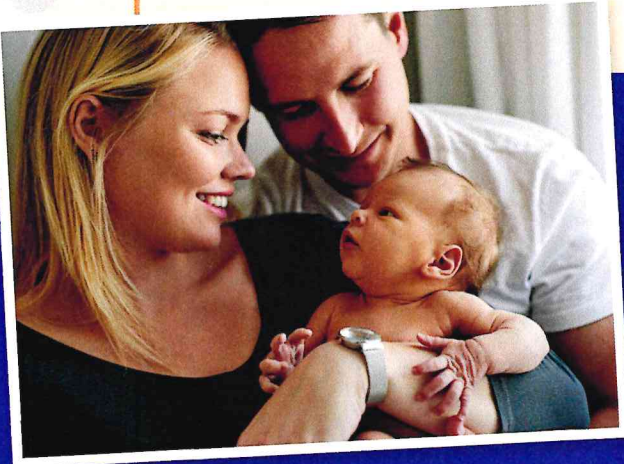
- Are you becoming Medicare eligible? When?
- Are you still going to be working after age 65?
- Are you going to be retiring soon?
- Do you cover a spouse and/or dependent(s) on your group health plan?

MEDICARE PART A, B, C, D

- Which plan(s) do you need?
- Can you delay enrolling in any Medicare plans?
- Medicare may not notify you about your initial enrollment period.

MORE TO THINK ABOUT

- Are you or your covered spouse on disability?
- Is your covered spouse also eligible for Medicare but not enrolled?
- Do you or your covered spouse qualify for a special enrollment period?



I NEED TO CHANGE MY BENEFITS

DID YOU KNOW...

There are only certain times when you can enroll and/or make changes to your benefits.

- When you are 1st hired
- Once a year during open enrollment
- When you experience a qualifying life event

WHAT EXACTLY IS A QUALIFYING LIFE EVENT?

Certain changes in your personal life qualify as an official change in status according to the IRS which means you can modify your benefit elections outside of New Hire or Open Enrollment. Examples of qualifying life events are:

- Marriage
- Divorce
- Having a baby, adoption, change in child custody
- Death of a dependent
- Other examples include:
 - ✓ A change in employment status such as a termination of employment or change in employment status from part time to full time or vice versa (*assuming the change in status affects your ability to participate in the benefits plan*)
 - ✓ Spouse or dependent loses a job, starts a new job, loses full time status
 - ✓ Spouse or dependent goes through open enrollment at their work

IMPORTANT:

You only have 30 days from the date of the event to report it to Human Resources and request any desired changes to your benefits. Requests for changes outside of the 30 days will not be approved, and you will have to wait until the next open enrollment period to change your benefits.

QUESTIONS?

Please contact Human Resources.



REQUEST FOR PROPOSAL for Benefits Consulting & Broker Services

RFP 2025-07

**City of Wildwood
100 N Main Street
Wildwood, FL 34785**

352-330-1343 (Phone)

RFP # 2025-07

Benefits Consulting & Broker Services

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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 on or before the *Response Submission Deadline* date listed on the *Calendar of Events / RFP Timeline*. Sealed proposals shall be delivered to the "Utilities Department" window in City Hall. Proposers shall take careful notice of the following conditions of this Request for Proposals:

- A. Proposals (responses to the Request for Proposal) shall be delivered to the location stated above and on or before the due date/time referenced. Proposals shall be in sealed envelopes, boxes or other packaging with the Request for Proposal number and title clearly marked on the outside of the package. The company name shall also be provided on the outside of the package.
- B. Submissions by FAX or other electronic media will not be accepted under any circumstances. Late submissions will not be accepted under any circumstances.
- C. Proposers (respondents) may withdraw and/or replace proposals at any time until the deadline for submission of proposals.
- D. All questions received on or before the *Last Day of Questions* provided on the *Calendar of Events/RFP Timeline* page will be considered. Questions will not be answered over the phone. Questions regarding the RFP process must be in writing and sent to Robert Schoepe, Procurement Specialist via email to rschoepe@wildwood-fl.gov or faxed to (352) 330-1353 Attention: Robert Schoepe, Finance.
- E. Do not attempt to contact any City of Wildwood staff members, contracted project representatives or any person with questions relating to this solicitation and project details. All questions shall be directed to the Procurement Specialist. Anyone attempting to lobby City of Wildwood representatives may be disqualified. Questions will be answered in a published addendum from the date of issuance to the submission deadline date. Contact with all those involved with evaluation and selection decisions is prohibited until the resulting contract is awarded and enacted.
- F. Any bidder affected adversely by an intended decision with respect to the award of any bid, shall file with the City Clerk's Office of the CITY OF WILDWOOD, a written notice of intent to file a protest not later than seventy-two (72) hours (excluding Saturdays, Sundays, and established City 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.
- G. It is the sole responsibility of each respondent to monitor the City's website (www.wildwood-fl.gov) for any and all bid documents, including addendums.

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 finds it necessary to change any of the dates prior to and including the Submission Deadline, the change will be accomplished by a published addendum.

Please note that City Hall and other City offices are closed in observation of the following holidays: New Year's Day, Martin Luther King Jr. Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Friday after Thanksgiving, and Christmas Day. These holidays have been factored into the RFP timeline and no Completion Date falls on a day that City Hall is closed.

ACTION	COMPLETION DATE
Issue RFP	February 4, 2025 (Tuesday)
Last Day for Questions	March 3, 2025
Addendums Posted (If Necessary)	March 6, 2025
Response Submission Deadline	March 11, 2025 (Tuesday) @ 2:00 PM EST
Selection Committee Meeting	March 17, 2025 thru March 31, 2025
Contract Award	Estimated April 28, 2025

PROPOSAL CHECKLIST OF ITEMS REQUIRED TO BE SUBMITTED

The following documents and forms, in the listed arrangement must accompany each Proposal Package or alternate RFP submitted:

1. One (1) original unbound and signed proposal (hardcopy)
2. four (4) copies of the vendor's original proposal

The checklist summarizing how your response shall be organized is provided below. Detailed information about the response preparation, organization and the required forms is located in PART 5-*Qualification Documents*.

QUALIFICATION PACKAGE: Checklist of items to be submitted		
	Tabs	Content
	Cover Page	RFP Cover Page form. (Attachment 1)
	Tab A	Statement of Interest
	Tab B	Company Information
	Tab C	Team Composition and Resumes
	Tab D	Cost Competitiveness
	Tab E	Method of Approach
	Tab F	Additional Information
	Tab G	References
	Tab H	Additional Required Documents
	H1	Proposer's Certification / Addenda Acknowledgement form
	H2	Proposal form
	H3	Statement of Terms and Conditions form
	H4	Hold Harmless Agreement
	H5	Drug Free Workplace Certificate
	H6	Sworn Statement to Section 287.133(3)(a), Florida Statutes, on Public Entity Crimes form
	H7	Conflict of Interest Disclosure form
	H8	Immigration Affidavit Certification
	H9	A page that clearly identifies and numbers any Exceptions or Deviations from the Scope of Services or the terms and conditions
	H10	A Certificate of Insurability (COI)

The checklist is provided for your convenience and is not required to be submitted with the Proposal Package (response).

PART 2 - INTRODUCTION

PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit offers from qualified insurance brokers to assist the City of Wildwood with strategically planning, designing and negotiating the best coverage and cost for selective employee benefit programs. Our leadership is looking to ensure we have financially competitive and affordable benefit programs to offer our employees.

The City of Wildwood ("CITY") invites proposals for benefits consulting and insurance broker services. It is necessary for respondents to read the information contained in this Request for Proposal (RFP), understand how to submit the proposal, what documents must accompany the proposal and what legal obligations the respondent is submitting for by providing a complete proposal. The CITY may select, or not select, at their sole discretion, any Contractor that the CITY feels will best address their needs.

SELECTION PROCESS

Selection will be based on the criteria as defined within this RFP. Selection of the Contractor will be in accordance with Florida Statue 287.057.

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. Vendors 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 documents suitability for the 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:

- A. Capability and qualifications of the proposer to deliver the proposed services
- B. Proven experience as demonstrated with recent contracts/projects for local government agencies within the State of Florida
- C. Resources and availability to meet the City's needs
- D. Customer references and past performance
- E. Prices proposed

The selection process incorporates these general criterium as well as those identified in Part 3 – *Scope of Services*, Part 4 – *Evaluation and Award*, and any addendums released as part of the RFP competitive process.

ADDITIONAL CONDITIONS

The following are conditions incorporated into the request for proposal collection, evaluation, and awarding processes:

- A. Receiving Proposals: The City reserves the right to reject any or all Proposals received, to request additional information, or to extend the deadline for submittals.
- B. 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 award.
- C. 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.
- D. Equal Employment Opportunity: During the performance of the resulting 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 Services 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 Vendor 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 Services, 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 response submittal 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 (see submittal Attachment H2).

In case any Vendor fails to acknowledge receipt of such addenda or addendum, his/her RFP submittal 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 the 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 response submittal 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 _____" which shall appear beneath such a signature. In the case of a partnership, the signature of at least one of the partners must follow the vendor's name and the words, "Member of the Vendor" should be written beneath such a signature. If the Vendor is a corporation, the title of the officer signing the RFP submittal response on behalf of the corporation must be stated and evidence of his/her authority to sign the RFP forms. 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 an 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. The term of the Contract resulting from the solicitation, shall be for an initial thirty-six (36) month period. The Contract may, by mutual assent of the parties, be extended for two (2) additional twelve (12) month periods or portions thereof, up to a cumulative total of sixty (60) months.

PART 3 - SCOPE OF SERVICES

The City of Wildwood, Florida ("CITY") is interested in selecting a firm to provide benefits consulting and broker services. The purpose of this RFP is to select a qualified contractor to furnish all materials, labor, supervision, transportation, inspections, permits, licenses, equipment, and any incidentals necessary to provide benefits consulting and broker services.

GENERAL BACKGROUND

1. Demographics
 - A. The City of Wildwood is a local government with approximately 228 benefit eligible employees and retirees. The City's benefit package is a primary tool for recruiting and retaining high-performing employees.
2. Current State of Benefit Plan
 - A. Currently the City offers its employees the following insurance plans. Single-only coverage is provided free to employees for 3 medical plans, dental, vision, \$50K life insurance, and short-term disability.
 - B. Currently the City offers its employees the following insurance plans:
 1. 5 medical plans through Florida Blue (HMO Plan 78, Blue Care HSA 130/131, Blue Care HMO 47, Blue Options 3900 and Blue Options 5772)
 2. Flexible Spending Account/Dependent Care Account - Medcom
 3. Dental Insurance – Mutual of Omaha
 4. Vision Insurance – Mutual of Omaha
 5. Teladoc
 6. Short Term Disability – USABLE
 7. Life Insurance – Medcom
 - C. Additional benefit details may be found in Exhibit 2: 2024-2025 Employee Benefit Guide.

GENERAL SERVICE REQUIREMENTS

1. Review and Advise
 - A. The selected service provider shall assist and advise in reviewing the City's insurance benefit plans on a continuing basis to ensure the plans are in compliance with all state and federal regulations.
 - B. The service provider shall ensure the benefit plans are competitive in nature and cost. The City expects that recommendations will be made with respect to plan design alternatives and providers as dictated by trends, best practices and availability of services.
 - C. A review and analysis of the goals and objectives of the benefit design shall be completed to ensure that they are sound and focused on meeting the needs of City employees.
 - D. Reviewing contracts, plan documents, insurance policies and related documents to ensure technical accuracy and consistency is a critical role of the selected service provider.
2. Provide Consulting
 - A. The provider shall be required to regularly provide information related to pending or new legislation, benefit funding and market trends as well as making recommendations on how to respond to such information.

- B. The selected provider shall advise and assist the City in drafting any necessary plan amendments and assist with submissions of written reports and other documents required by state and federal law.
 - C. The City requires, when requested, that the service provider participates in communications and meetings with insurance and healthcare carriers. Travel and meeting time will not be compensated by the City.
 - D. The provider shall serve as liaison between the City and all benefit vendors, including customer service and assistance in resolving claims and billing issues.
 - E. The selected service provider shall be responsible for maintaining the confidentiality of the City's records and data, which cannot be sold, shared or otherwise disclosed to other companies or individuals without written permission from the City Manager.
 - F. The service provider shall assist the City with developing benefit vendor performance guarantees to evaluate the services being provided on a continual basis.
 - G. Evaluation of, processing of, reporting and compliance with HIPPA and with COBRA and retiree benefit administration is required of the selected service provider.
3. Reporting and Documentation
- A. The provider shall maintain records of the plans, financial and claims experience, and provide quarterly progress reports to continually evaluate the effectiveness of the plans.
 - B. The provider shall assist in drafting, editing, printing and production of employee benefit materials.
 - C. It is required by the City that compensation for all services provided under the resulting contract shall be in the form of commission from carriers/vendors. Compensation will be based on the negotiated commission paid by each carrier for the respective lines of coverage. NO additional costs or fees will be paid by the City. The selected service provider will supply the City with an annual statement, from each carrier, giving full disclosure of all compensation earned. Annual disclosure of all direct or indirect earnings will be required as well.

PART 4 - EVALUATION AND AWARD

RFP EVALUATION

This Request for Proposals includes following all the procedures in this document and sending the sealed RFP submittal response information (proposal package) 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 TABLE

Evaluation Scoring Criteria Description	Weight
Capacity, Qualifications and Experience: The degree to which each proposal provides evidence an ability and capacity to respond to the needs of the City of Wildwood. The provider's professional experience should be provided in the proposal with responsiveness, preciseness and thoroughness.	40%
Method of Approach: Evidence of the ability to provide service in a prompt, thorough and professional manner. Availability of and accessibility of the selected service provider, including the location of the office that will be servicing our account.	30%
Proven Ability: Demonstrate the ability to reach a wide array of insurance markets and provide innovative solutions proven with the proposal submitted as well as the relevance of the references provided.	20%
Cost Competitiveness: a compensation methodology that is competitive and within market range.	10%

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 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, request clarification, ask questions or further investigate response content, 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, Mr. Jason Wheeler, 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 a 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 – City’s, Lessees, or Contractors, or CG2026 Additional Insured – City’s, 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 – City's, Lessees, or Contractors, or CG 2026 Additional Insured – City's, 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 INSTRUCTIONS/DOCUMENTS

ECONOMY OF PRESENTATION

Each proposals package shall be prepared simply and economically, providing a straightforward, concise description of the proposer's (respondent's) capabilities to satisfy the conditions and requirements of this RFP. The emphasis in each proposal's 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 submitted proposal 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 fifty (50) 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 fifty (50) page limit. Package the Work Product Samples separately from the Proposal, labeling the sample clearly.

PROPOSAL PACKAGE SECTIONS AND QUESTIONNAIRE

The Respondent shall organize its proposals package into the following major sections. Answer the questions provided and expand on the topics under each tab that best represents your qualifications. It is recommended that the Checklist provided in Part 1 be used to ensure all sections (tabs) and submittal attachments (forms) are included.

COVER PAGE: RFP cover page: Insert Submittal Attachment **A1** here.

Tab A. STATEMENT OF INTEREST: To be submitted on the Vendor's letterhead. The statement of interest shall:

1. Concisely state an understanding of the services required by the CITY OF WILDWOOD.
2. Include relevant information not requested elsewhere in the RFP that introduces the company to the City and summarizes the company's qualifications to perform the services requested.
3. The **signature** on the statement shall be that of a person authorized to represent and bind the Vendor.

Tab B. COMPANY INFORMATION: Provide an overview of your company, including a brief description of your company's history, growth, ownership, philosophy/culture, approximate number of employees and financial growth.

1. What is your experience in the municipality and government sectors?
2. How long has the company been in business in Florida?
3. How many years has the company been doing the type of work described in the Scope of Services?
4. What is the length of time your firm has provided services to governmental clients?
5. Does your company have a Small Business, Veteran Owned or MWBE status? Include a copy of the company'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.

1. How is your account team structured? Please include a brief biography of the service team members who would support the City of Wildwood.
2. Who would be the primary company representative that will be working with City staff?
3. Who will be the day-to-day contacts for the account? If applicable, attach a copy of each person's current Professional Regulation License.
4. How would the account team serve the City of Wildwood differently than your competitors?

Tab D. COST COMPETITIVENESS: Include a description of relevant compensation structures, minimums and maximums, variations in product markets or other relevant information that demonstrates fair and competitive compensation approaches.

Tab E. METHOD OF APPROACH: Describe how company resources are managed to complete the work including allocations of general tools and equipment used. Describe strategies to ensure the highest quality of product and work is provided.

1. How will work be performed to eliminate as much disruption to traffic, business and activity in the surrounding area?
2. How does your company plan to meet schedules and deadlines?
3. What training resources does your organization provide to assist your clients in educating their employees?
4. How does your organization strive to streamline benefit administration for your clients? What is your methodology and involvement in claims and billing advocacy?
5. What is your average response time to questions regarding claim and eligibility issues? How do you handle follow up to outstanding issues?
6. What tools are used in data analysis? Describe your utilization data analysis capabilities.
7. Who will complete this analysis and how will the results be shared with the City?
8. What are your problem-solving methods (in detail) regarding dealing with any benefits-

related issues that arise with City employees? Provide an outline of steps of how you may resolve a benefits-related issue.

9. How would you provide proactive, front-facing customer support with an example of how your acts of being proactive better served an organization you are currently providing services to and what benefit that organization received?
10. What source for benefit plan design and cost benchmarks would you use to provide a market perspective on the City of Wildwood's benefit programs?
11. How do you propose to build an understanding of the direction and priorities of the City of Wildwood's business and how you would use this information in order to anticipate our benefit needs? Include examples of key deliverables you provide as part of that process.

Tab F. ADDITIONAL INFORMATION: Provide additional information describing your company's capability to perform the work advertised in the Scope of Services of the RFP.

1. Has or is your company currently involved in any formal court proceedings regarding any of your contracts? If so, provide an explanation and status.

Include any other information that demonstrates your company may be the most qualified and in the best interest of the City to select.

Photographs/charts/graphs are optional and may be provided in this section.

Tab G. REFERENCES: Include Attachment **A2**, Illustrative Work Form and any other information pertaining to the minimum of three (3) references for work performed that is similar to the scope of services for this RFP. Include references that are able to comment on your organization's relevant experience.

1. From your references' perspective, what makes your organization unique from other organizations that may submit proposals for the City of Wildwood's consideration?

References must be for current, or recent, projects, and must be for the proposed project team members. Ensure that Submittal Attachment 2 (Illustrative Work). has the company/city name, contract name, phone number and address are included.

Tab H. SUBMITTAL DOCUMENTS REQUIRED: As specified in Part 1 of this RFP, and listed within the *Proposal Documents Checklist of Items Required to be submitted* are the forms to be completed and returned.

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>	

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>		

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 # 2025 - 07
TITLE: HOLIDAY LIGHTING AND DECORATIONS 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 the 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 #	_____ 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

[Submittal Attachment H3]

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 (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. "VENDOR" 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 "CITY" 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 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/Bids 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: "VENDOR" s 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 "VENDOR"s 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 "VENDOR" s 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. "VENDOR" s or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.

"CITY" SHIP 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 "VENDOR" s 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 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: "VENDOR" s are fully and completely responsible for the labeling, identification and delivery of their submittals. The "CITY" 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 "VENDOR" s 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 with 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 Piggybacks 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 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/Bids 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 "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.

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.

The 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)

- a. 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.
- b. Informs employees about the dangers of drug abuse in the workplace, 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.
- c. Gives each employee engaged in providing commodities or contractual services that are under RFP or bid, a copy of the statement specified above.
- d. 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.
- e. 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.
- f. Make a good faith effort to continue to maintain a drug free workplace through the implementation of the drug free workplace program.
- g. "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

Page: 28

Page 429 of 442

1. This sworn statement is submitted to City of Wildwood
By _____
{print individual's name and title}
- for _____
{print name of entity submitting sworn statement}
- whose business address is _____
- and (if applicable) its Federal Employer Identification Number (FEIN) is _____ (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.}**

_____ 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.

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.

**PROFESSIONAL SERVICES AGREEMENT
SAMPLE**

THIS AGREEMENT is made this _____ day of _____, 2025, 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 Holiday Lighting and Decorations

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 #2025-07, for asphalt surface treatment.

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 Holiday Lighting and Decorations, and will work with the City to provide said services in accordance with the scope of services outlined in RFP #2025-07
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. 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. 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 Contractor and presented to the City pursuant to this Agreement are and remain the property of the City as instruments of service. 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.
- b. 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).
- c. 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.
- d. Contractor shall, at all times, carry Professional Liability, General Liability, Automobile and Worker's Compensation Insurance pursuant to the insurance requirements in RFP # 2025-07, naming City as an additional insured in each such policy.
- e. 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.
- f. 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 its rights hereunder, whether

litigation be instituted or not, at the trial court and appellate court level. 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.

13. 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.

14. This Agreement cannot be changed or modified, unless by written agreement signed by all parties hereto.

15. 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.

16. 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.

17. Each of the WHEREAS clauses listed above are hereby re-alleged and incorporated into this Agreement as if otherwise fully stated herein.

18. 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: Local Construction Projects Update

REQUESTED ACTION: For Information Only

CONTRACT:

Vendor/Entity:

Effective Date:

Termination Date:

Managing Division/Department:

BUDGET IMPACT:

HISTORY/FACTS/ISSUES:

Please see the attached update on local construction projects.

Local Infrastructure Projects
Construction Update
August 15, 2025

Updates Shown in Red

1. City Water Projects

- a. *US 301& CR 462 Line Relocation*
 - i. Hughes Brothers completing the work pursuant to the Twisted Oaks Developer's Agreement; SDC credits funding the work
 - ii. **Tie-ins and BacT's complete**
 - iii. **Grout to be completed by the end of the month**
- b. *Continental Country Club Water Treatment Plant Decommissioning*
 - i. **Design Progress – 90%**
 - ii. KHA coordinating permit requirements with SWFWMD and FDEP
 - iii. **Construction activities funded in FY 26**
- c. *Stanley Avenue Water Rain Replacement*
 - i. Design complete
 - ii. **Determining funding options**
- d. *North Old Wire Road Water Main Replacement*
 - i. Design complete
 - ii. **Included in FY 26 proposed budget**
- e. *South Old Wire Road Water Main Replacement*
 - i. Art Walker Construction - 483,511.23
 - ii. **Pay App No. 3 in the amount of \$90,558.01 approved at the July 28, 2025 Commission meeting**
 - iii. **Construction progress 85%**
 - iv. **Contractor scheduling major tie-ins with staff (boil water notices needed)**
- f. *Champagne Farm Wells and Future WTP*
 - i. Survey complete
 - ii. **LPP Developer's Agreement – ON HOLD per Developer**
 - iii. **Met with property owner's representative; future meeting to be scheduled**
- g. *CR 501 WTP- Iron Filtration and High Service Pump Upgrades*
 - i. Commission awarded bid to SGS: \$2,715,700
 - i. Substantial Completion – June 9, 2025
 - ii. **Construction Progress – 60%**

- iii. Pay Application No. 6 scheduled for the August 25th Commission meeting
- iv. Landscaping no longer part of the project; to be bid separately

2. City Wastewater Projects

a. *Water Reclamation Facility*

- i. CPH designing the expansion of the new plant to 8 MGD
- ii. Commission moved to build 4 MGD new plant and maximize the capacity of the existing plant; both will be AWT with a total capacity estimated at 6.5 MGD (after DavCo plant installed)
- iii. Garney Preconstruction Agreement approved at the January 22, 2024 Commission meeting
- iv. Garney Construction Contract approved at the August 12, 2024 Commission meeting
 - i. ~~Ancillary improvements~~
 - ~~i. Complete.~~
 - ii. Phase 1
 - i. GMP Phase 1 – \$34.5 million
 - ii. Commission approved ODP packages
 - I. All equipment ordered and being delivered on site
 - iii. Pay App. No.5 in the amount of \$850,738.30 approved at the August 11th Commission meeting
 - iii. Phase 2 – Awaiting 90% plans from CPH
 - i. 60% Constructability meeting held October 16, 2024
 - ii. 60% budget estimate received
 - iii. 1 MGD of temporary capacity approved by City Commission; equipment included in Phase 1 ODP; installation will be included in Phase 2 GMP
 - iv. SRF Coordination ongoing; impacts to timeline for GMP approval for Phase 2
 - iv. Phase 3
 - i. 30% ROM estimate received
 - ii. Awaiting 60% plans from CPH

b. *Rapid Infiltration Basin (RIB) Site Expansion*

- i. Design progress – 60% complete
- ii. Updated capacity numbers
- iii. Construction funded in FY 26 and will be completed during the dry season (winter)

- c. *SR 44 Forcemain and CR 219 Lift Station Improvements*
 - i. Funded by Sumter County BOCC (ARPA funds); awarded to Art Walker Construction
 - ii. Construction progress – 90% Complete
 - iii. Coordinating substantial completion walkthrough
 - iv. Preliminary punch list provided to the contractor
- d. *Millennium Park Reclaimed Water Line Extension*
 - i. R-12 Pump Station (RIBS site)
 - i. Commission awarded the bid to Cathcart Construction - \$4,165,466
 - ii. Construction progress – 0%
 - iii. Reviewing shop drawings
 - iv. ODP items approved at the August 11, 2025 Commission meeting - \$769,390
 - v. Construction to begin in October
 - ii. Reclaimed line design – 90% complete – to be bid in FY 26
 - i. ~~Phase 1 (Millennium Park)~~
~~i. Complete.~~
 - ii. ~~Phase 2: St. Claire Street~~
~~i. Complete.~~
 - iii. ~~Phase 3: Broken Oak Drive~~
~~i. Complete.~~
 - iv. Phase 4: Assembly of God Church
 - i. Easement shown on preliminary plat;
coordinating final easement document execution
 - v. ~~Phase 5: Solamar~~
~~i. Complete.~~
 - vi. Phase 6: Turkey Run Development and North to Catholic Church
 - i. Easement agreement for Turkey Run Lot 2 scheduled for August 25, 2025 Commission meeting!

3. City Projects (Other)

- a. *Wildwood Community Center Improvements:*
 - i. HVAC System Replacement:
 - i. Holiday Enterprise Heat and Air -\$554,300
 - ii. All air distribution and piping installed
 - iii. One unit installed
 - iv. Expecting delivery of major equipment and refrigerant soon

- b. *Millennium Park Phase I and II*
 - i. Kingdom Construction - \$10.7 million
 - ii. Construction progress – 30%
 - iii. ODP items approved
 - iv. Pay Application No. 6 in the amount of \$249,068.81 and Change Order No. 2 (knee wall) scheduled for the August 25th Commission meeting
- c. *Dr. Martin Luther King Jr. Park Recreation and Outreach Center*
 - i. OLC Design contract approved at the 5/22 City Commission meeting
 - ii. Design progress – OLC preparing 60% design documents
- d. *Public Works Annex – The Villages*
 - i. OLC has started conceptual design activities
 - ii. Looking for property
- e. *Police Substation – The Villages*
 - i. KP Design Studio has finalized the building footprint
 - ii. Looking for property
- f. *Downtown Master Plan Related*
 - i. Coordinating with FDOT on Complete Streets Project
 - i. Coordinating with LSMPO and FDOT on funding alternatives
 - ii. Scoping meeting held on July 9, 2025
 - ii. CSX Coordination
 - i. Meeting held CSX Real Estate team on July 15th
 - ii. City reviewing conceptual screen layout proposed by KHA
 - iii. Shared Compactor – WM
 - i. Commission to consider Kingdom Construction's bid of \$55K for the enclosure
 - ii. Compactor lease with WM in future
 - iv. Christian Worship Center
 - i. Commission moved to demolish the building and obtain an architect for conceptual design options
 - ii. RFQ awarded to Gator Sketch
 - iii. Scoping meeting held; awaiting proposal/contract
 - v. The Railyard
 - i. Construction ongoing

4. City Stormwater Projects

- a. *Oak Grove Village Drainage Improvement*
 - i. DB Civil awarded the bid - \$529,890
 - ii. Construction Progress – 20%
 - iii. Contractor requesting Change Order for time due to equipment delivery delay
- b. *Missouri Avenue Stormwater Project*
 - i. Awarded to Paquette Co - \$109,415
 - ii. Coordinating contract documents and construction schedule
- c. *Osceola Stormwater Pond*
 - i. Real estate closing completed
 - ii. 100% design plans received
 - iii. Acquisition of the last remaining parcel for the stormwater pond on the Commission agenda for 7/14
 - iv. Project included in the Barwick Street project; included in the proposed FY 26 budget

5. City Road Projects

- a. *Pavement Activities*
 - i. FY 26 - Updating Pavement Management Plan to determine new decision tree and appropriate funding amount; new funding amount programmed in FY 26 and beyond
 - i. Transferred segment of CR 213 included in FY 26 activities
- b. *Signature Drive and Clay Drain Road*
 - i. Project Phases
 - i. Signature Drive Phase
 - i. Commission awarded bid to CW Roberts - \$428,515.50
 - ii. All permits received
 - iii. Coordinating start date
 - ii. Clay Drain Road Phase
 - i. Funding to be programmed in the CIP based on priority scoring (ROW in FY 27; construction in FY 28)
- c. *Jackson Street (Utilities, Roadway, and Drainage)*
 - i. DB Civil - \$1,533,916
 - ii. Construction Progress – 95%
 - iii. Final completion walkthrough occurred on 8/15

d. Barwick Street Improvements:

- i.* Design Progress – 80%
- ii.* All ponds acquired
- iii.* Added water line replacement to the scope of project
- iv.* Construction funded in FY 26 and FY 27
- v.* Project to be bid in October pending budget approval