



CITY OF BELLE ISLE, FL CITY COUNCIL MEETING

Held in City Hall Chambers 1600 Nela Avenue Belle Isle, FL 32809

Held the 1st and 3rd Tuesday of Every Month

Tuesday, January 03, 2023 * 6:30 PM

AGENDA

City Council Commissioners

Nicholas Fouraker, Mayor

Vice-Mayor – Jim Partin, District 7

District 1 Commissioner – Ed Gold | District 2 Commissioner – Anthony Carugno | District 3 Commissioner – Karl Shuck |
District 4 Commissioner – Randy Holihan | District 5 Commissioner – Beth Lowell | District 6 Commissioner – Stan Smith

Welcome to the City of Belle Isle City Council meeting. Agendas and all backup material supporting each agenda item are available in the City Clerk's office or website at www.belleislefl.gov. If you are not on the agenda, please complete the yellow "Request to Speak" form to be handed to the City Clerk. The Council is pleased to hear relevant comments and has set a three-minute limit. Rosenberg's Rules of Order guide the conduct of the meeting. Order and decorum will be preserved at all meetings. Personal, impertinent, or slanderous remarks are not permitted. Please silence all technology during the session. Thank you for participating in your City Government.

1. **Call to Order and Confirmation of Quorum**
2. **Invocation and Pledge to Flag** - Comm Lowell, District 5
3. **Consent Items** - These items are considered routine and have been previously discussed by the Council. One motion will adopt them unless a Council member requests before the vote on the motion to have an item removed from the consent agenda and considered separately. Any item removed from the Consent Agenda would be considered for consideration following the remainder of the Consent Agenda.
 - a. Approval of City Council meeting minutes - December 20, 2022
4. **Citizen's Comments** - Persons desiring to address the Council must complete and provide the City Clerk a yellow "Request to Speak" form. When the Mayor recognizes you, state your name and address and direct all remarks to the Council as a body, not individual council members, staff, or audience. Citizen comments and each section of the agenda where public comment is allowed are limited to three (3) minutes. Questions will be referred to staff and should be answered within a reasonable period following the meeting date.
5. **Unfinished Business** - na
6. **New Business**
 - a. Approve Proposal to Update Rate Study for Stormwater
 - b. Discuss Draft Ordinance for Septic Waste Haulers
7. **Attorney's Report**
8. **City Manager's Report**
 - a. Introduction of Public Works Director
 - b. Issues Log
 - c. Chief's Report
9. **Mayor's Report**
10. **Items from Council**
11. **Adjournment**



**CITY OF BELLE ISLE, FL
CITY COUNCIL MEETING**

Tuesday, December 20, 2022, * 6:30 pm
MINUTES

Present was:

- Nicholas Fouraker, Mayor
- District 1 Commissioner – Ed Gold
- District 2 Commissioner – Anthony Carugno
- District 3 Commissioner – Karl Shuck
- District 5 Commissioner – Beth Lowell
- District 6 Commissioner – Stan Smith
- District 7 Commissioner – Jim Partin

Absent was:

- District 4 Commissioner – Randy Holihan

1. Call to Order and Confirmation of Quorum

Mayor Fouraker called the meeting to order at 6:30 pm, and the Clerk confirmed quorum. Also present were City Manager Francis, Attorney Langley, Chief Houston, Deputy Chief Grimm, Planner Raquel Lozano, and City Clerk Yolanda Quiceno.

2. Invocation and Pledge to Flag – Commissioner Stan Smith, District 6
Comm Smith gave the invocation and led the pledge to the flag.

Mayor Fouraker called for a motion to excuse Comm Holihan from today's meeting.
Comm Gold moved to excuse Comm Holihan from the December 20, 2022, meeting.
Comm Lowell seconded the motion, which passed unanimously 6:0.

3. Consent Items - n/a.

- Approval of City Council meeting minutes – November 15, 2022
- Approval of City Council meeting minutes – December 6, 2022

Comm Partin made corrections to the minutes of December 6, 2022, as follows,
Page 1, 7a reads, "He presented an updated site survey for the 1209 Hoffner Avenue property, .56 acres of open space with a 25-foot easement off Hoffner;.."
Should read, "He presented an updated site survey for the 1209 Hoffner Avenue property, .56 acres of open space with a 25-20-foot easement off Hoffner;.."

Page 2, 7a reads, "We do not have excess property, and this is a ~~very~~ inexpensive acquisition that allows us to plant our flag further toward Hansel Avenue."
Should read, "We do not have excess property, and this is a fairly inexpensive acquisition that allows us to plant our flag further toward Hansel Avenue and can be used as a bargaining chip."

Page 2, 7a motion reads, "~~Comm Smith moved to accept the offer to purchase the property at 1209 Hoffner Avenue for \$200,000, contingent on a clear environmental assessment. Comm Gold seconded the motion, which passed unanimously 5:0.~~"
Should read, "Comm Smith moved to continue to move forward with the purchase of this property, pending all reviews, environmental surveys, and everything comes back clean. Comm Gold seconded the motion, which passed unanimously 5:0."

There being no further edits, Comm Gold moved to approve the minutes as corrected.
Comm Carugno clarified the Purchasing Policy threshold required for Council approval.
Comm Lowell seconded the motion, which passed unanimously 6:0.

4. Citizen's Comments

Mayor Fouraker opened for Citizen Comments.

Donella Altice residing at 1309 E Wallace Street, spoke regarding the new municipal building and asked if they would consider placing the new City Hall/Police Department on Wallace Field. It would be an added safety feature for the kids attending CCA and the homes surrounding Wallace field and provide easy access for patrol vehicles. The boat access and ramp will also be conveniently accessible. She shared her concerns with individuals who use the field and wander into private property.

There being no further comments, Mayor Fouraker closed citizen comments.

5. Unfinished Business

a. Discussion/Approval to create the position of Assistant City Manager

City Manager Francis spoke on his request for approval of an Assistant City Manager. The Budget Committee had a previous discussion on the new position, which was placed on the needs list as a priority; however, it was not funded in the budget. He resubmitted a list of projects and the responsibilities of the Public Works Director and the City Manager. He said it does not include the day-to-day items or attending City meetings. Mr. Francis said he called the Florida League of Cities to see if they have a list of cities that have an assistant City Manager. They said they did not have the data. He noted that the position is not based on population but on ongoing projects.

Mr. Francis noted that the salary range would be less than the former Director's.

As a clarification, Comm Smith said that at the last meeting, he would like to see a job description, qualifications, and cost allocation.

Comm Shuck said he could see the need because the job of the City Manager is much more complicated than a few years ago. It will also provide for a succession plan.

Comm Carugno said he would like to see this go to the Budget Committee to see how they would allocate the funds and whether the Council can interview and hire for the position.

Comm Lowell asked if the position would have any employees report to them. Mr. Francis said the Public Works Director would probably fall under their supervision.

Comm Lowell said the list of the Public Works Director is separate from the additional responsibilities of the City Manager. It may speed up some of the projects in addition to and not in lieu of because they both hold different responsibilities. She also believes it should go to the Budget Committee for a recommendation.

Comm Partin said it would be prudent to table this discussion and have the Budget Committee review the request for a recommendation to Council.

Mayor Fouraker said the City Manager could use some assistance to work at a higher level. It can be a succession plan, and he would like to have the Council schedule a workshop after the Budget Committee's recommendation to further discuss the position and the process.

Comm Gold said that after a review of the to-do list, many of the projects would fall under the Public Works Director, and he wonders how much of a load will be taken off the City Manager.

Comm Carugno moved to table discussion to the first meeting in February after the Budget Committee meeting review with an option to schedule a workshop for discussion.

Comm Partin seconded the motion.

Comm Partin said the suggestion of a workshop is a good idea and allows Council to develop a hiring process.

Comm Shuck said he thought it was the City Manager's responsibility to hire his staff, not for Council to hire them to work with the City Manager.

Attorney Langley said that once the position is created, the City Manager will fill the role under the Charter. The Council can provide input about the job qualifications. In addition, Comm Shuck asked for clarification on the budget committee's role in recommending the position; will they be creating the job description, or is it to find funding? Mayor Fouraker said it would be for funding and creating a budget line item for the additional staff.

City Manager Francis said the Assistant City Manager could apply for the City Manager's position once it is opened and advertised by Council. The Assistant will only fill the spot in the absence of the City Manager.

Comm Gold said many hypotheticals might happen in the City Manager's absence. In filling the position, and Council defines the position under their discretion. Attorney Langley said the Charter is very specific: the City Manager hires and fires all staff. The City Council can only hire and fire the City Manager and Clerk. If the City Manager is comfortable with this process, he can ask for Council input; however, it is inconsistent with the Charter.

Comm Gold said that because it may be a successor, he believes the Council should have the right to choose and select the right fit. He would like to see a survey of the surrounding five cities on how much they spent per Populus/project on City Management.

The motion passed 5:1 passed with Comm Shuck, nay.

6. New Business

a. Approval to extend the waiver for permit fees for damaged docks

City Manager Francis said Council passed a resolution to allow the waiver of building permit fees for various items through December 28, 2022. Many residents continue to repair their docks and roofs. He asked for a 90-day extension of the deadline from December 28, 2022, to March 31, 2023, for hurricane-related repair.

Comm Gold moved to extend the waiver of permit fees for Hurricane related damages to March 31, 2023.

Comm Carugno seconded the motion, which passed unanimously 6:0.

b. Social Media Services Request for Proposal

Mr. Francis said the RFP for Social Media Services was included in the budget to allow the hiring of a consultant. City Manager Francis asked for a discussion before advertising.

Comm Smith moved to approve moving forward with the RFP for Social Media Services.

Comm Lowell seconded the motion.

Comm Gold asked to add language to include ADA compliance.

Mr. Francis said there is a Hold Harmless section in the agreement on Page 42.

The motion passed unanimously 6:0.

c. Discuss Receipt of Unsolicited Proposal for New Police Facility

City Manager Francis said that under Florida Statute, there is a vehicle in which to procure services Public Partner Partnership (P3). It also allows entities to submit to the Governing body unsolicited proposals. We received one from the Public Safety Development Group and a \$10,000 check as an application/review fee, per Statute. At the end of the evaluation period, staff can recommend to Council to approve or deny. If the Council does not accept, they can reject it and return the proposal and the application fee now or after the evaluation period. City Manager Francis said that at this time, the location is up in the air, and we are looking to negotiate one location.

Attorney Langley said the City could issue an RFP to solicit what it wants. Many details need to be worked out; in his experience, other cities have rejected these proposals. Under the Statute, the City must have a team to evaluate/vet the proposal and other details before moving forward.

Comm Partin said there is some benefit to turn-key; however, the Council will not be justified to not look at other companies that can provide the same services. City Manager Francis said the proposal could be returned at any time until an agreement is signed, and a Resolution is passed.

Comm Smith asked if the proposal is confidential due to the red borders in the document. Attorney Langley said the P3 Statute was repealed, and the entire proposal is open to public record.

Comm Lowell moved not to evaluate the proposal and return the check.

Comm Smith seconded the motion, which passed unanimously 6:0.

d. Approve Monetary Donation of Peter Madison Management

City Manager Francis reported that the City had received a monetary donation of \$40,000 from Pete Madison for police equipment. As per the City's donation policy, it must be brought to Council for approval. Comm Gold asked if there was a conflict in accepting the donation. City Manager Francis said he is not aware of any conflicts. Attorney Langley noted the City could accept the donation because it goes directly to the City, not an individual.

Comm Gold moved to approve the donation of Peter Madison Management in the amount of \$40,000.

Comm Carugno seconded the motion, which passed unanimously 6:0.

7. Attorney's Report - na

8. City Manager's Report

a. Issues Log

- City Manager Francis announced the following community meetings.
 - Jan 5th – 6 pm at the Extension Center to discuss the Clarion Hotel from Commercial to PD
 - January 12 – 5:30 pm CCA Auditorium to discuss the campus expansion
- City Manager Francis stated that the staff had interviewed four good candidates for the PW's position. He will announce the selection at the following Council meeting,
- Mr. Francis gave an overview of the Issues Log dated December 20, 2022. He added that he received an extensive email from Greg Gent regarding airport noise and will contact him to discuss further.

b. Chief's Report

Chief Houston reported on the following,

- Chief Houston said she visited Idaho and St. Marie properties that the City Inspectors have posted.
- The Police Department had a promotion ceremony and congratulated Andrew Clark as Corporal.
- Reach out to your neighbors and elderly residents with the upcoming cold weather. Chief Houston said if requested, the City can set up City Hall as a shelter for residents during this cold front. She called for donations of coats, blankets, and towels.

9. Mayor's Report

Mayor Fouraker reported on the following,

- Mayor Fouraker spoke of his concerns with the Hoffner purchase. He highlighted some events that led to him not approving the Letter of Intent. He requested a copy of the contract and the survey and noticed it was signed on November 25. He discovered in the title commitment that the 20-foot easement, the only egress, and ingress on the property, is a wellhead. The adjacent property owner holds a claim to that wellhead and does not want to move it. This creates a title defect, and we will not be able to get title insurance. At a minimum, this issue was sloppy, confusing, and challenging. At a maximum, he doesn't understand why Council was not apprised of these material issues. In June, the Council did give the City Manager authorization to negotiate business terms and letters of intent. Still, he was not authorized to sign the documents creating improper handling of documents.

Comm Gold asked if the City received the 25,000. Mayor Fouraker said it was terminated on time.

Comm Partin said he needs to understand if this was an oversight on the commercial property broker.

City Manager Francis said that when they talked with the owner, he was aware of some of the challenges; however, the homeowner was willing to work through the issues. On November 16, he sent an email, call or text to Council members on the property before bringing it to the December 6th Council meeting. The only Council member that objected was Vice Mayor Partin, stating that the price of \$210,000 was on the high end. On Thanksgiving, the broker sent a standard document, and he signed it to start the due diligence process. He told the broker that this must go to Council for a vote, and the broker understood. On December 6, he brought it forward and asked Council to move forward with the purchase. Before December 6, he sent it to the City Attorney, who said there was a red flag. Mr. Francis noted that he doesn't think that it can't be overcome. He stated that there was no intent to dupe the Council and finds it highly offensive that the Mayor said he has no integrity.

City Manager Francis said the Mayor did not feel comfortable signing the document because (1) he didn't walk the property, (2) he disagreed that it is a good piece of property, and (3) he didn't speak to Comm Uribe about the property. Mr. Francis then signed the cancellation paperwork and sent it not to lose the escrow. Mr. Francis said he should have brought the contract to Council and apologized, knowing that if the Council said no on December 6, we would get the escrow back. That was what he was thinking, and he did not do anything malicious or hide anything from Council and certainly does not have to have his integrity questioned. He made an error.

Mayor Fouraker said the Council decided on the purchase with what was made available. The Council should be able to have all the material facts. With the title defect, the property is worth less than \$200,000 because a bank cannot lend on that property with the easement issue. Some risk management practices were missed; Council did not review the contract, we did not have an appraisal, and the City Manager certainly needed to have the authority to sign a contract on behalf of the City. Mayor Fouraker apologized for stating he did not have integrity; however, not having all the evidence, he was placed in a position he does not want to ever be in again.

Comm Partin said Mayor Fouraker made the right decision to bring this forward and apologized for the statements made in the email.

Attorney Langley said that if the Council wants to move forward with the purchase with the known facts as presented, you might want to make a motion to approve the purchase with a different closing date. If not, nothing else is required. Mayor Fouraker said it is not a fair price with those defects. The property cannot get financing with the wellhead issue, and the City needs a mock site plan or uses declared.

Comm Carugno moved forward with purchasing the 1209 Hoffner Avenue property for \$200,000 with the same terms previously discussed, with a closing date at the City Manager's discretion. Comm Shuck seconded the motion, which failed 3:4 with Comm Partin, Comm Smith, Comm Lowell, and Comm Gold, nay.

The Mayor called for a 5-minute comfort break.

- Mayor Fouraker pledged to advertise for the Comp Plan and Traffic Committee members.
- Mayor Fouraker thanked Comm Uribe for moving the community meeting to discuss the Clarian Hotel to the AG Center on January 5h. He asked Mr. Francis for an update to reconcile the application with the code/variances versus what it would take to build the building from scratch. Mr. Francis said he is unsure if the staff can create a logical document. Orange County has many regulations, and we will not be able to get into all the regulations and give an effective report. Mr. Francis said there might be something in State Statute 164 – Conflict Resolution that we could discuss. Attorney Langley said if the City wants to object to the project, they must be present at the meeting to add them for the record.
- He asked for an update on registering Septic companies working in the City. Mr. Francis said it would be an ordinance change and will bring brought forward at a future meeting.

10. Items from Council

- Comm Partin spoke about caring for our senior residents and thanked staff for leading the blanket and coat drive. He would like to help establish an elder care program.
- Comm Lowell asked staff to send an elert asking for gently used blankets and coats.
- Raquel Lozano, City Planner, gave a brief update on the artificial turf survey closing on January 1, 2023.
- Comm Carugno said he would like to bring forward the purchase of the Hoffner property on the next agenda. He thought it would be a great property to own. He further spoke on the high weeds in Lake Conway. He added that the weeds are causing damage to people's property.

11. Adjournment

There being no further business, Mayor Fouraker called for a motion to adjourn.
The motion passed unanimously at 9:00 pm.



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: January 3, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Proposal for Study to Update Stormwater Rate

Background: The City Council authorized issuing an Request For Proposals (RFP) from qualified individuals or firms for the preparation of an updated Utility Rate Study for stormwater services. The City’s current rate structure has been in place, with few modifications, since 2003, the City desires a complete review including recommendations for improvement.

At the time, the Equivalent Residential Unit (ERU) to measure the rate was 4,087 square feet; however, due to development in recent year, the staff believes this ERU may no longer be valid and needs to be adjusted. Stormwater fees are currently assessed as a non-ad valorem assessment on property taxes and collected by Orange County under an agreement with the City.

The City received three very good proposals for this study:

Stantec Consulting Services	Sarasota, FL	\$40,000
Raftelis Consulting	Maitland, FL	\$49,869
Willdan Financial Services	Orlando, FL	\$49,368

After review, it is recommended that the proposal of Willdan be accepted. Due to the length of the proposals presented, the proposal of Willdan is included. Other proposals can be reviewed in the City Clerk’s Office. The staff believes that Willdan will provide a thorough review of the current rate structure and revenue sufficiency, provide thoughtful and creative recommendations for changes and improvements which will result in an equitable and sustainable rate structure that will serve Belle Isle residents for many years to come.

This study was not included in the current budget; therefore it will be included in the semi-annual budget amendment.

Staff Recommendation: Approve the proposal of Willdan Financial Services..

Suggested Motion: I move that we approve the proposal of Willdan Financial Services in the amount of \$49,368.00 and authorize the City Manager to negotiate and execute a Professional Services Agreement with Willdan.

Alternatives: Do not approve and review other proposals.

Fiscal Impact: \$49,368.00 from the Stormwater Fund reserve.

Attachments: Willdan Financial Service Proposal

City of Belle Isle, FL

Proposal

Update Rate Study for Stormwater RFP # 23-01

December 20, 2022

Office and Contact Info:

Willdan Financial Services
200 South Orange Avenue, Suite 1550
Orlando, FL 32801
Contact: Tara Hollis | P: 407.255.2928 | E: thollis@willdan.com



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Tab 2 – Letter of Transmittal

December 20, 2022

Mr. Bob Francis, City Manager
Ms. Yolanda Quiceno, CMC, City Clerk
City of Belle Isle
1600 Nela Avenue
Belle Isle, Florida 32809

Re: *Proposal in Response to City of Belle Isle RFP # 23-01 - Update Rate Study for Stormwater*

Dear Mr. Francis, Ms. Quiceno, and Evaluation Committee Members:

Willdan Financial Services (“Willdan”) is excited to present our qualifications to conduct an Update Rate Study for Stormwater for the City of Belle Isle (“City”) pursuant to the Request for Proposal (“RFP”) identified above. We understand that the primary purpose of the study is to review and evaluate the current rate structure and revenue sufficiency of the existing rates and make recommendations for adjustments and rate modifications that will result in an equitable and sustainable rate structure that will be able to fund future revenue requirements.

The City is committed to maintaining the financial integrity and stability of providing stormwater management services, facilities and programs. This is evident in that the City has initiated an update to their stormwater rates in order to protect the health, safety, and welfare of the general public through the administration and regulation of earthwork and drainage city-wide. We are pleased to have the opportunity to partner with the City and provide the requested stormwater utility consulting services.

We have worked with numerous municipal and district utilities to address these concerns and meet these objectives. Willdan is one of the largest public sector financial consulting firms in the United States. Our company has helped over 800 public agencies successfully address a broad range of financial challenges, such as financing the costs of growth and generating revenues to fund desired services. Our firm contains professionals with decades of experience in stormwater utility operations and economic/financial management. For this project Willdan is proposing to team with Inwood Consulting Engineers, Inc. (“Inwood”). The Willdan Team is highly qualified for this engagement. These qualifications include:

Project Team/Experience — For this engagement, Willdan has assembled a project team of senior level subject matter experts that are highly qualified to perform the requested consulting services. Collectively, the team brings over 125 years of experience and has prosecuted over 600 governmental rate and financial projects throughout the country. In addition, the proposed project manager for this engagement, Ms. Tara Hollis, CPA, CVA has provided utility rate consulting services in Florida and the Southeast region since 1999. Additional team members include Managing Principal Jeffrey McGarvey, Principal Consultant Daryll Parker, Analyst Tiffany Rosario from Willdan, and Steve Sommerfeldt, PE, Josh Spence, PE, Tyler Pierce, PE, and Madeline McIntosh, EI, who are all with Inwood. The Willdan Team is located in Central Florida, with Willdan members located in our Orlando, Florida office, and Inwood members located in Oviedo, Florida.

Unique Approach — Our approach to utility rate development has been carefully honed over the years. Unlike individual engineering and financial firms that may specialize in one area or the other, Willdan combines unsurpassed utility rate modeling and financial planning (Willdan’s specialty) with proven operational and economic analysis. We will work collaboratively with City staff to carefully assess and understand the unique utility system concerns and issues, and develop a tailored, rather than a “cookie-cutter,” approach.

Willdan’s interactive approach will result in a customized Excel financial model that is easy to use, and that the City will retain. The model and accompanying documentation will provide a focused and tailored analysis of the City’s current rates/assessments, customer classifications and characteristics, revenues, capital project and operational expenditures, debt commitments, reserve funding, and other financial data.

The culmination of our analyses will be a comprehensive financial management plan that develops projected system operating results for the next 10 fiscal years. We will employ our proven interactive approach, supported with advanced financial modeling techniques, to develop a sophisticated and flexible financial model to help us guide the City through operating and financial scenarios, while evaluating the impact of policy assumptions, and performing sensitivity analysis on stormwater rate and financial strategies.

Communicating the Results — Sound technical analysis is only one element of this process. To gain political and community acceptance, it will be equally important to effectively communicate results and implications of the proposed rate structure(s) to City staff, City Council, key stakeholders and, ultimately, to those that will be subject to the new rates/assessments. Willdan works with clients to develop educational materials and is available to participate in community workshops and stakeholder meetings.

When called upon, our proposed project team of qualified and experienced consultants can provide the consulting expertise you require. Shown below is a brief highlight of our experience.

- A national company and one of the fastest growing consulting firms in the country;
- Development of an Excel-based dashboard model designed specifically for your needs;
- Cultivation of a partnership approach with City staff members;
- Fixed-fee pricing with no change orders unless additional services requested by the City;
- An industry leader (AWWA Manuals/Professional Speaking);
- Subject matter experts, "Best Practices" guidance;
- Ability to balance both financial and political realities;
- Focus on open communication with frequent project updates; and
- Stringent internal Quality Assurance/Quality Control program.

Thank you for your consideration; we appreciate having the opportunity to submit the following proposal to the City of Belle Isle. If you have any questions, please do not hesitate to contact Managing Principal Jeff McGarvey at (407) 459-7117 or via email at jmcgarvey@willdan.com or Principal Consultant Tara Hollis at (407) 255-2928 or via email at thollis@willdan.com.

Respectfully submitted,

WILLDAN FINANCIAL SERVICES



Tara L. Hollis, CPA, CVA, MBA
Project Manager, Principal Consultant



Jeff McGarvey
Managing Principal, Vice President
Willdan Authorized Representative



Tab 3 – General Information

Firm Description

Willdan Corporate Profile

Willdan Financial Services is an operating division within Willdan Group, Inc. (WGI), which was founded in 1964 as an engineering firm working with local governments. Today, WGI is a publicly traded company (NASDAQ: WLDN). WGI, through its divisions, provides professional technical and consulting services that ensure the quality, value and security of our nation’s infrastructure, systems, facilities, and environment. The firm has pursued two primary service objectives since its inception—ensuring the success of its clients and enhancing its surrounding communities.

A financially stable company, Willdan has approximately 1,500 employees working in 26 states across the U.S. Our team includes a number of nationally recognized subject matter experts for all areas related to the broadest definition of connected communities—*four of whom are committed to contribute their expertise throughout the duration of the City of Belle Isle’s project engagement.*

Willdan has solved economic, engineering and energy challenges for local communities and delivered industry-leading solutions that have transformed government and commerce. Today, we continue leading our clients into a future accelerated by changes in resources, infrastructure, technology, regulations, and industry trends.

Willdan Financial Services

Established on June 24, 1988, as a California corporation, Willdan Financial Services, is a national firm and is one of the largest public sector economic and financial analysis consulting firms in the United States. Since that time, we have helped over 800 public agencies successfully address a broad range of infrastructure challenges. Our staff of over 70 full-time employees support our clients by conducting year-round workshops and on-site training to assist them in keeping current with the latest developments in our areas of expertise. While our traditional business hours are Monday-Friday from 8:00am - 5:00pm, our team members are responsive as needed. The project work for the City of Belle Isle will be conducted at the Orlando, Florida office, which has a team of 10 professionals.

Founded in 1964

50+ Offices Nationwide

800+ Municipal/Government Clients

Experience across 13 States 7 Countries

Experience spanning 30+ Years

240+ Utility Rate Studies in the past 5 years

Members of: American Water Works Association (AWWA), The Water Environment Federation (WEF), The WaterReuse Foundation (WRF), National Association of Certified Valuers and Analysts (NACVA)

DIVERSE STAFF: Project Managers, Financial Consultants, Community Engagement Experts, CPA's, Certified Valuation Analyst

Willdan Financial Services	
Areas of Expertise	
<ul style="list-style-type: none"> Utility rate and cost of service studies User fee studies Cost allocation studies Real estate economic analysis Tax increment finance district formation and amendment Property tax audits Housing development and implementation strategies 	<ul style="list-style-type: none"> Development impact fee establishment and analysis Economic development strategic plans District administration services Municipal advisory services Feasibility studies Arbitrage rebate and continuing disclosure services Debt issuance support Long-term financial plans and cash flow modeling

**Willdan Financial Services
Address & Contact Information**

Principal-in-Charge	Project Manager
---------------------	-----------------

Jeffrey McGarvey
 Managing Principal – Vice President
 200 South Orange Avenue, Suite 1550
 Orlando, Florida 32801

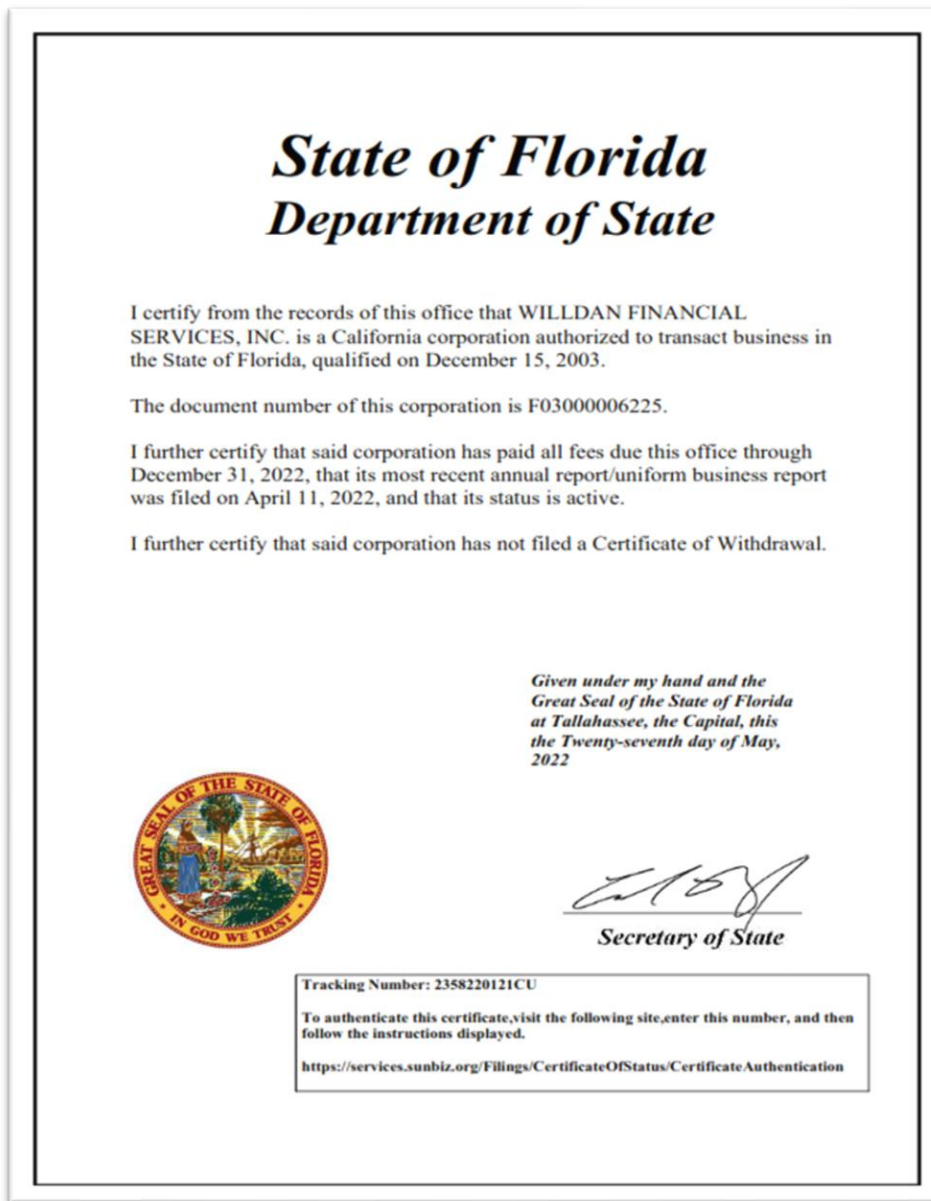
Tara L. Hollis, CPA, CVA, MBA
 Principal Consultant
 200 South Orange Avenue, Suite 1550
 Orlando, Florida 32801

Tel #: (407) 872-2467 | Email JMcGarvey@Willdan.com

Tel #: (407) 255-2928 | Email THollis@Willdan.com

State of Florida Documentation

Willdan Financial Services is licensed, permitted and/or certified to do business in the State of Florida; copies of all such licenses issued to Willdan are provided.



Florida Department of State, Division of Corporations' Sunbiz Report



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Detail by Entity Name

Foreign Profit Corporation
WILLDAN FINANCIAL SERVICES, INC.

Cross Reference Name

MUNIFINANCIAL, INC.

Filing Information

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Annual Reports

Report Year	Filed Date
2020	05/28/2020
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Subconsultant Firm Profile



Inwood Consulting Engineers, Inc., is a privately owned Florida Corporation providing public involvement and civil, transportation, water resources, utility, planning, traffic engineering, environmental sciences, and engineering consulting services to governmental clients throughout the state of Florida. Since its inception in 1995, Inwood has grown to a staff of over 75 and has developed a reputation for tenacity in meeting project schedules, honoring commitments and providing innovative solutions to difficult challenges for our clients.

The Inwood team has extensive experience in Project Development and Environment (PD&E) studies, Efficient Transportation Decision Making (ETDM) processes, public involvement, complex highway design, drainage design, structural design, stormwater management, permitting, Geographical Information Systems (GIS), water and wastewater pipeline design, pump stations, construction services, and project management. Firmly committed to helping resolve stormwater issues around Florida through its engineering projects, the company has performed numerous watershed projects, stormwater retrofits, and water quality assessments.

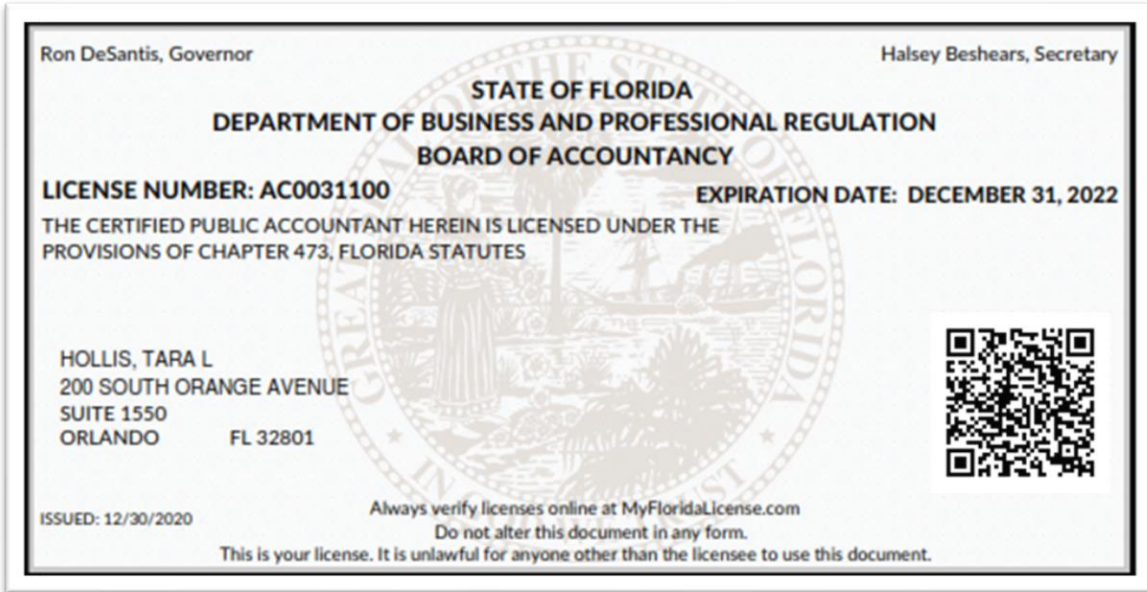
Inwood also provides transportation design, water and wastewater, utilities design, planning, and environmental science services. Inwood strives to be a source of pride for our employees, our clients, and our community. Through a steadfast focus on our core values in every aspect of our business, Inwood looks to our future growth and diversification with our clients' needs in mind.

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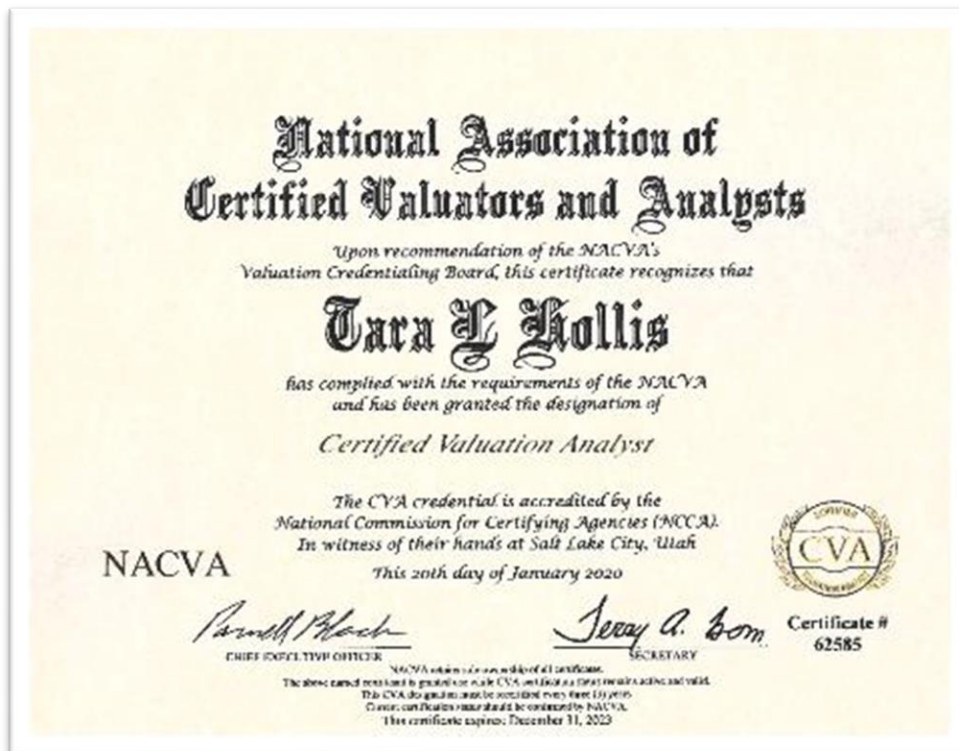
Professional Certification/Licenses

Willdan Principal Consultant Tara Hollis is a Certified Public Accountant in the State of Florida, No. AC-0031100, and has a Certified Valuation Analyst designation from the National Association of Certified Valuators and Analysts. Inwood Consulting Engineers team professional engineering licenses are also provided.

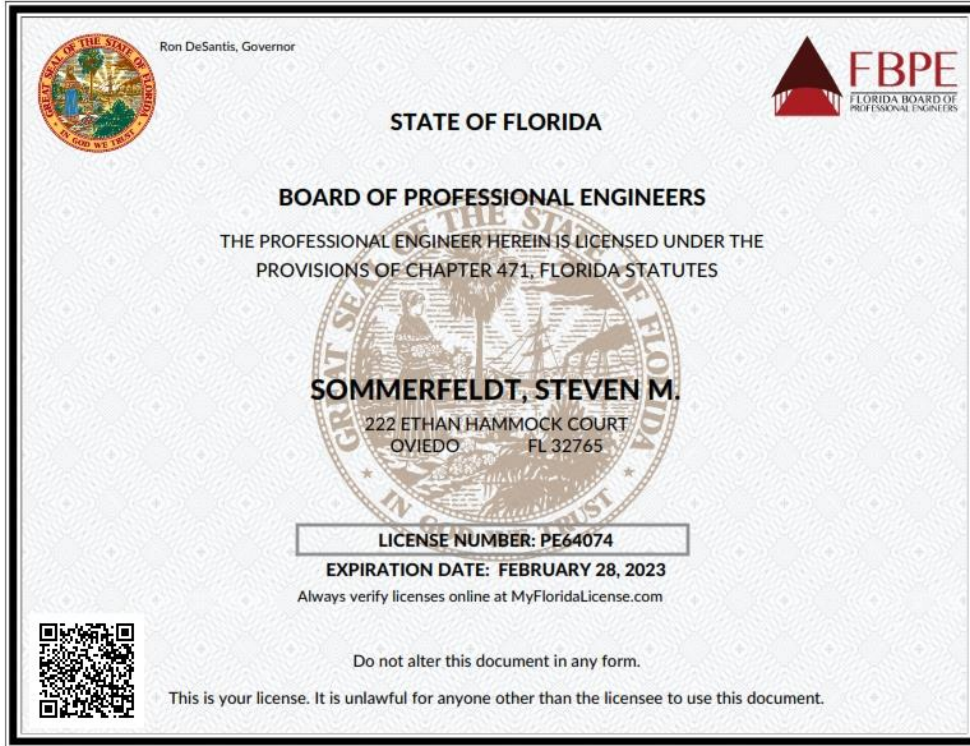
Certified Public Accountant License - Willdan



Certified Valuation Analyst - Willdan



Professional Engineering Licenses - Inwood



Ron DeSantis, Governor

STATE OF FLORIDA

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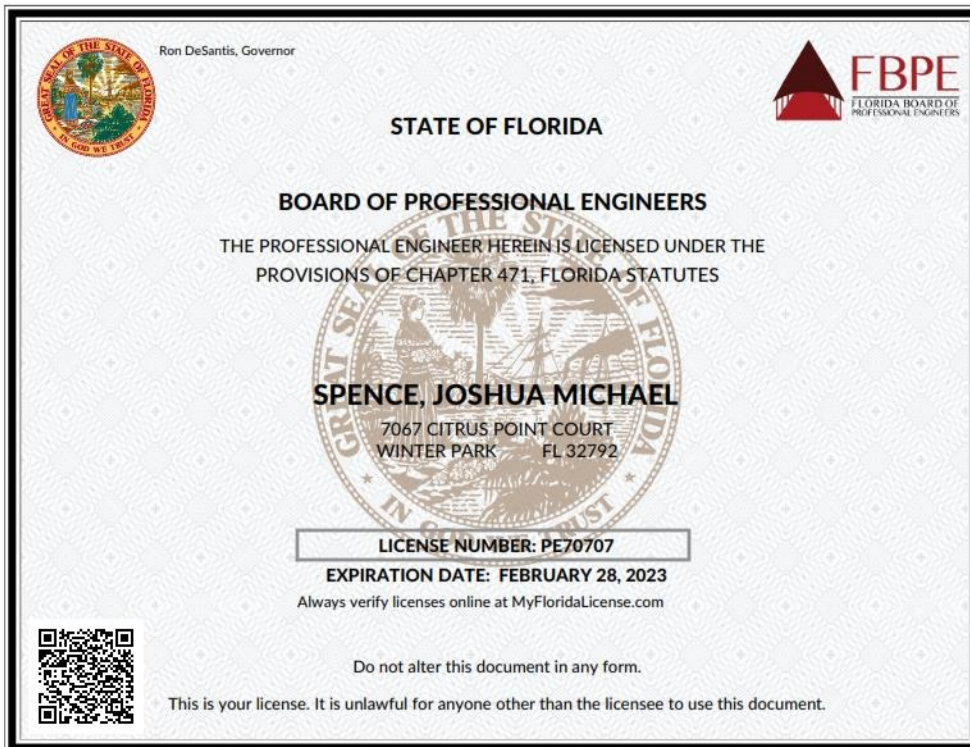
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STATE OF FLORIDA

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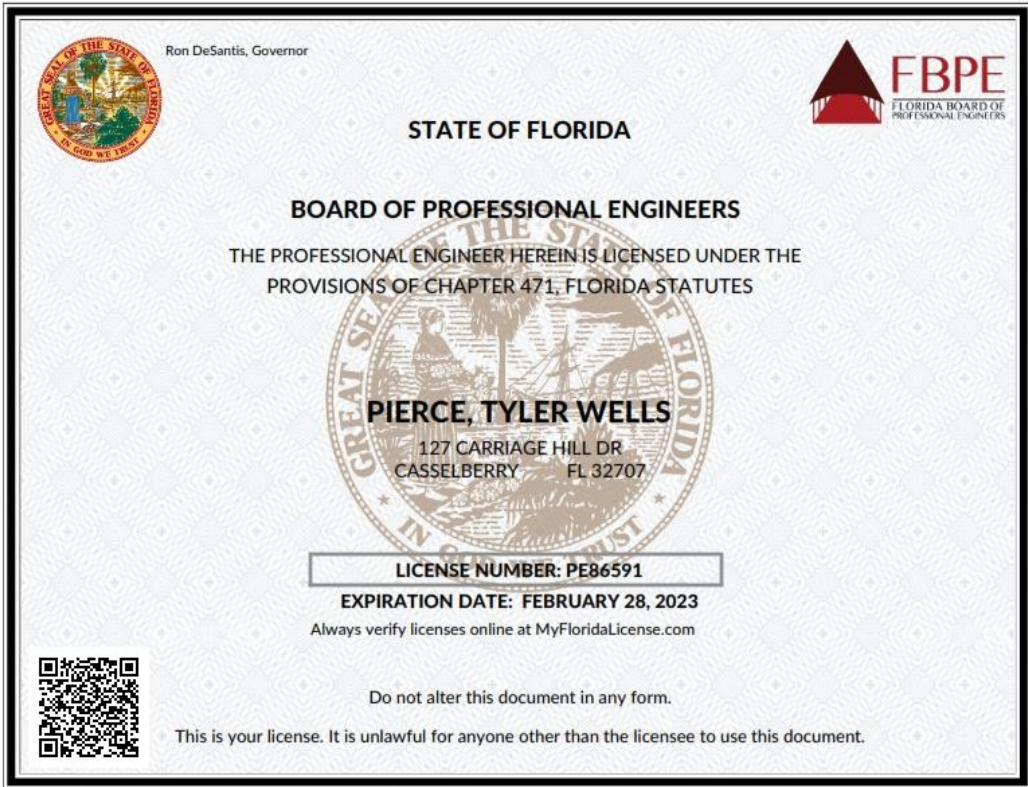
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NOTE: This RFP was located via a bid notification service that emails relevant opportunities.

Tab 4 – Project Approach

Statement of Project Understanding

The City uses an enterprise fund to account for stormwater activities. In reviewing the financial performance of the City's Stormwater Fund shown in the comprehensive financial reports for fiscal years 2017 through 2021, we noted that the Stormwater Fund has been operating at an extremely low margin, which results in low liquidity and little to no reserves available for needed capital improvement projects.

Willdan's approach will include an analysis of key historical financial performance metrics with recommendations for any steps necessary to enhance the financial health of the fund. We recognize the City's need to not only fund operating expenses but to adequately fund ongoing capital needs including its \$1.5 million 5-Year Capital Improvement Plan ("CIP"). Willdan will work with the City to fully integrate a multi-year capital plan which matches project costs and timing to funding sources and the proposed rate plan ensuring the Stormwater fund has the necessary resources.

As stated in the City's request for proposals, it is Willdan's understanding that the City is soliciting for a qualified consulting firm to develop a comprehensive stormwater rate study update. The City desires to conduct a cost-of-service analysis and develop a stormwater rate structure that maintains equity between customer classes. The rates must be clear and understandable, easily administered by City staff, follow cost-of-service principles, provide revenue stability, and be equitable. Willdan confirms that each requirement will be met and completed.

Specifically, the City has requested the proposed scope to include:

- 1) Study the current stormwater funding structure compared to other municipalities of similar population and situation;
- 2) Analyze alternative funding structure methods (ex: tiered rate structure) to ensure RATE equitability; and
- 3) Provide a plan for updating the existing stormwater rate to fund the stormwater department for the next ten years, including but not limited to:
 - a. Fee increase determination;
 - b. Total revenue expectations;
 - c. Impervious area analysis and ERUs;
 - d. Individual customer rate analysis; and
 - e. Determination of credit/incentive mechanisms.

Scope of Services

The project team has developed our all-inclusive scope of work to complete the City's objectives for preparing a Stormwater Utility Rate Study. The first phase, Project Initiation, as described in this section is designed to:

- Assure that the project team has a thorough understanding of the City's issues and financial needs,
- Establish the methods to be used to gather all necessary data,
- Identify assumptions that will be used in the analysis of revenues and expenditures, and
- Set project milestones for deliverables and public meetings.

This kick-off session will establish the detailed project understanding. Deliverables are scheduled for completion throughout the project schedule and meetings with staff are calendared to keep City staff informed and to encourage staff input. The project team will provide deliverable packages throughout the project for the purpose of keeping City staff informed of the analytical results and project team's understandings. Deliverables may be provided by electronic means such as email for immediate results.

Our approach is designed to achieve the City's goals and objectives set forth in this proposed Scope of Services. This approach is logical, cost effective, and incorporates standard procedures and methods of a sound cost of service study. This approach to the services requested by the City, is summarized as follows.

Phase 1: Project Initiation

The purpose of Phase 1 is to formalize the lines of communication between the project team and appropriate City personnel, to develop the project schedule, and to ensure that the project objectives are clearly defined and understood by all parties. This phase of the study will also consist of gathering and reviewing information related to stormwater operations. Such information will include financial statements, budgets, prior relevant studies (master plans, comp plans, etc.), capital improvement plans and GIS data, and will allow for the determination of customer classifications, property characteristics, and financial performance standards.

The functions performed in this initial phase of the project will provide the foundation for completing a successful engagement. The following is a discussion of the major tasks anticipated for this phase.

Task 1.1 - Kick-Off Meeting

An organizational meeting will be conducted with City personnel and the Willdan Project Team in order to finalize project responsibilities, establish a schedule of project deliverables, and address other administrative issues. In addition, the kick-off meeting will allow for identification of the primary objectives and concerns to be addressed in the study, as well as the establishment of a conceptual rate design strategy.

Task 1.2 - Data Acquisition

A detailed data request will be prepared for the City in order to assist staff in gathering specific information regarding the operation of the utility system and the allocation of costs among the rate structure attributes. The data request is intended to be comprehensive in nature and may include such information as historical financial data; adopted operating budgets; historical customer data; existing rate schedules; stormwater master plan; capital improvement plan; GIS parcel data; and land use and zoning data.

Task 1.3 - Data Review

The data obtained during the data acquisition phase will be thoroughly reviewed to gain an understanding of the historical operations, as well as to identify other information that may be necessary for completing the resulting analyses. Parcel and land use and zoning data will be a critical element in developing and updating Equivalent Residential Units (ERUs) during the rate setting process. This proposal assumes that the City will be able to provide the required parcel and land use and zoning data in a readily usable electronic format and in a timely manner.

Phase 1: Deliverables

- Project schedule/timeline

Phase 2: Revenue Requirements and Customer Data

The purpose of Phase 2 is to ensure that all costs incurred to provide stormwater service are recovered from the proposed user rates and charges. Also, this phase provides an understanding of the customer base and usage characteristics (i.e. the rate determinants) associated with the stormwater system. In this phase, it is important to work closely with City staff in order to ensure an accurate portrayal of operating and maintenance expenses as well as the allocation and/or acquisition of debt service due to capital improvements or facilities expansion.

Task 2.1 - Develop Net Revenue Requirements to be Recovered from Stormwater Rate

The primary purpose of this task is to develop the level of expenses and other funding requirements from rates (i.e. operating expenses, renewal and replacement of assets, payment of debt service (if applicable), capital investment to be funded from rate revenues, etc.) for the ten (10) year planning period. Specifically, this task will include the following:

- Identification of major expenditures of the stormwater system to insure sufficient cost recovery from rates.
- Development of projected operation and maintenance expenses and other related costs associated with the stormwater system. The projections are based on factors such as inflationary impacts, changes in expenses associated with new programs, changes in utility regulations, and other related aspects as they may relate to the system.
- Based on utility policies and goals, identification and recognition of any other expenditures currently not being fully recovered by the utility, including for example, the recognition of an administrative allocation charge for common or shared expenses, adequate transfers for the purpose of renewal and replacement of capital assets, or any other type of expenditure that is not currently reflected in the budget that needs to be included.

- Review of the capital improvement program as well as the sources of funds to meet such programs. Such forecasts of capital costs not only include expansion-related projects, but projects associated with renewals, replacement, and betterment of the system as well as departmental capital outlay (vehicles, equipment, etc.).
- Identification of other revenue and/or expenditure offsets that will serve to reduce the amount of revenues required to be generated from user rates (interest income, miscellaneous service charges, etc.).

Task 2.2 - Projected Billing Determinants

This task involves examining accepted methodologies for the determination of ERUs. Stormwater events in the City are generally a result of rainfall, which is either partly absorbed through pervious areas or becomes runoff that collects and must be directed for detainment and disposal. The extent of the City's responsibility is directly related to the amount of runoff contributed by each property, which for most properties is directly related to the impervious area and the facilities that such properties install and maintain to contain and treat runoff prior to entering the City's facilities. This task will also include review of any mitigation credits that the City may wish to implement and the potential impact on the projected billing determinants.

Several different methods exist for developing an ERU factor including: 1) Impervious Area Method, 2) Intensity of Development Method, and 3) Equivalent Hydraulic Area Method.

As part of this task, the project team will work with the City staff to identify and review the characteristics of the properties located within the City's incorporated limits to identify the appropriate method to use for developing the ERU factor. The Willdan Team will also update the impervious area analysis and GIS data as needed based on changes since the impervious area layer was developed.



Phase 2: Revenue Requirements and Rate Determinants - Deliverables

- Parcel analysis and proposed ERU factors.
- Criteria for and calculation of mitigation credits.
- Estimate of potential costs to initiate and implement a stormwater utility.
- Identification of proposed stormwater services and benefits to be provided by the City to all property owners.
- Total adjusted revenue requirements based on the current and/or projected budget.

Phase 3: Development of User Rates and Charges

Phase 3 will establish an equitable, defensible rate structure, determining the appropriate rate components, and developing a methodology for allocating the revenue requirements to the applicable rate components. The allocation of revenue requirements will define the total costs to be recovered through each component of the rate structure. The cost-of-service allocations will be designed to allocate the various costs, such as operating expenses, capital expenditures, debt service, administrative and other transfers and renewal and replacement requirements to appropriate cost recovery mechanisms or components for the utility system. The following is a discussion of the tasks anticipated for this phase.

Task 3.1 - Cost of Service Allocations

The primary purpose of this task is to develop the methodology to be used for assigning the cost of stormwater operations, maintenance, system indebtedness (if applicable, this information will be provided by the City's Municipal Advisor), and capital improvements of the system to the various customers and cost recovery components. This will involve a review of the allocation of the revenue requirements to the individual classes and rate structure component for rate design purposes. The characteristics of each customer class will be considered in the allocation of the stormwater system revenue requirements and costs.

Task 3.2 - Design User Rates

The rate model spreadsheet will be developed in a dynamic manner such that the Willdan Team and City staff will be able to analyze “what-if” scenarios detailing the financial impacts under each scenario utilizing an iterative dashboard view. Baseline rate structures will be recommended as required to fund the stormwater system, and consider annual inflationary, indexed adjustments to rates as needed to maintain the utility.

The recommended rate structure alternatives will be developed to recover the projected revenues needed to fund utility operations, infrastructure/capital improvements, recognizing equitable cost recovery by customer class, establishing reasonable recovery of costs from existing and new utility customers, and complying with applicable regulations and policies. Any alternative rate structures will be based on common industry standards and will be consistent with the City’s goals and objectives regarding the stormwater system. Willdan will review various parcel characteristics for potential impacts on how stormwater costs are allocated to each parcel including an impervious area analysis, hydraulic runoff coefficients, parcel size, intensity of development, equivalent hydraulic area, etc.

Pursuant to the allocated costs developed in the previous task, the net revenue requirements established in Phase 2, the projected customers and ERUs, the rate policies of the utility, and rate structure guidelines of applicable regulatory agencies, user rates for the stormwater system will be designed so as to recover the costs in an equitable manner. The calculated user rates will incorporate the applicable components in accordance with the cost-of-service allocation analysis. As part of this analysis, the Willdan Project Team will use impervious area analysis to develop a tiered rate for residential properties throughout the City. This will be based on a statistical analysis of residential properties throughout the City.

Discussions will be held with the staff in order to ensure that the proposed rates meet the goals of the utility. The project team will prepare a sensitivity analysis to assess the ability of the revenue stream generated by the rate structure to fully fund the system costs and other costs under the impacts of future water quality and environmental regulations and standards.

Task 3.3 - Mitigation Credit Policy Review

The Willdan Project Team will review the City’s current Mitigation Credit policy. Mitigation credits are typically based on parcel specific privately maintained stormwater management facilities and other factors affecting the quantity, quality, or rate of stormwater runoff. The Willdan Team will make policy adjustment recommendations as necessary based on our review of parcel specific data from properties within the City limits, as well as based on any changes in regulations at the local, state, and federal level.

Task 3.4 - Rate Comparisons with Other Utilities

To assist in the evaluation of the rate structure and proposed rates, a comparison will be developed showing the proposed rates of the utility with those of other stormwater utilities throughout the State. This will provide an indication as to the rate levels charged by others in relation to the rate levels developed in the study.

Task 3.5 - Projected Operating Results

The final task in this phase is to develop a schedule of the projected operating results for the stormwater utility. The projected operating results will provide a summary estimate of revenues and expenditures anticipated in future years, identify where deficiencies may occur, and provide an estimate of the order of magnitude for future rate adjustments. Financial operating results will be prepared based on the Tax bill method whereby all eligible parcels are billed an annual amount included on the property tax bill.

Phase 3: Development of User Rates and Charges - Deliverables

- Allocation of revenue requirements.
- Allocation of operations and maintenance to levels of service.
- Allocation of capital to the levels of service.
- Alternative rate structures, advantages, and disadvantages.
- Comparison of bills of alternative rate structures to other stormwater rates throughout the State.

Phase 4: Preliminary/Final Reports, Meetings & Presentations

The purpose of this phase of the project is to present the findings and recommendations to City staff and City Council to document the overall analysis in a complete and concise report. This phase of the project will consist of the preparation of a draft report and the final report.

Task 4.1 - Prepare Draft Report

A draft report will be prepared, complete with applicable output and supporting documentation. Ten (10) copies of the draft report will be presented to City staff for their review. Contents will also include assumptions relied upon for the projection of customers and usage characteristics, revenue requirements, revenues, operating results, the cost recovery profile for each class, the results of the fully allocated cost-of-service analyses and any proposed adjustments to the stormwater rates.

Task 4.2 - Prepare and Deliver Final Report

Upon completion of the final review by the City Council and staff, the report will be finalized and ten (10) copies submitted to the City. The final report will address the immediate and anticipated financial concerns of the stormwater system regarding the equity and sufficiency of rates. In addition, the report will provide discussions of the methodology and assumptions utilized in the analyses, as well as the differences between the current and proposed practices of the utility.

Task 4.3 - Prepare Draft Stormwater Utility Rate Ordinance

The Willdan Team will work with the City to develop an updated draft stormwater utility rate ordinance for review by the City Attorney, including a credit/appeals process. The ordinance will incorporate the recommendations of the City with respect to user charge methods and other policy issues.

Task 4.4 - Rate Model Dashboard

The study will include the development of a spreadsheet model in Microsoft Excel and will be developed in such a way as to project cash flows over the 10-year projection period by allowing “what-if” scenarios by varying rates, target reserve fund balances, debt service coverage targets, operating expense and capital cost assumptions. The model will be provided to the City and will have a user-friendly dashboard with interactive graphics that automatically produces a suite of reports and graphs as inputs or assumptions are changed.

Task 4.5 - Staff Meetings

The project approach developed herein proposes three (3) meetings between the project team and the City during the course of the study. The first is the kick-off meeting described in Phase 1. This meeting will be held at the City’s offices, occurs at the start of the project, and will provide the opportunity to discuss in detail the goals and objectives for the study, and the best way to accomplish them. The second meeting will be to discuss the preliminary study and methodology used in the development of the City’s proposed rate with City staff. The third meeting will be to discuss the draft rate study report with City staff as well as the best way to implement the proposed rate structure modifications and associated rates. We believe that these meetings during the course of the study will ensure that the study is consistent with the needs and desires of the City throughout the project.

Task 4.6 – Presentations and Public Meetings

The project approach will also include one (1) presentation/workshop to the City Council discussing conclusions and recommendations of the study. As part of this public meeting, the project team will address the public’s questions and concerns relative to the need for and benefits of the stormwater utility system. In addition, the Willdan Team will attend two (2) public meetings for adoption of updated stormwater rates.

Phase 4: Preliminary/Final Reports, Meetings & Presentations – Deliverables

- Draft report
- Final report
- Rate Model Dashboard
- Rate Ordinance Updates
- Presentation materials

Additional Services

The City may also be interested in additional professional services to implement the stormwater utility beyond those

Public Education and Outreach Program – tasks may include:

- Development of educational materials related to the stormwater management program; materials can be in several media (newsprint, stuffers for municipal mailings, add-ons for websites, etc.) and focus on the basis and need (legal and environmental) for the program, general description of the program’s activities and objectives, and generalized information about the costs of the program and how those costs will be met;
- Preparation of materials (slide shows, brochures, etc.) for use by City staff at presentations to interest groups (taxpayer groups, civic associations, school students, senior citizens, business groups, etc.); and
- Conduct familiarization and training program for City staff to familiarize the staff with the materials.

Items to be Furnished at No Expense to the Project Team

The City will assist the project team by furnishing, at no cost to the project team, all available pertinent information including previous reports, financial statements, budgets, cost estimates, customer data, agreements, ordinances, codes, and any other data relative to performance of the above services for the project. The project team shall be entitled to reasonably rely upon, with no obligation to verify, the completeness and accuracy of all information, data, reports, studies, plans and specifications provided by City or by the City’s attorneys, engineers, accountants, consultants, or employees to the project team. The City shall not make a claim against the project team alleging that the project team should not have relied upon such information provided by the City to the project team so long as the project team’s reliance was reasonable and not the result of gross negligence on its part.

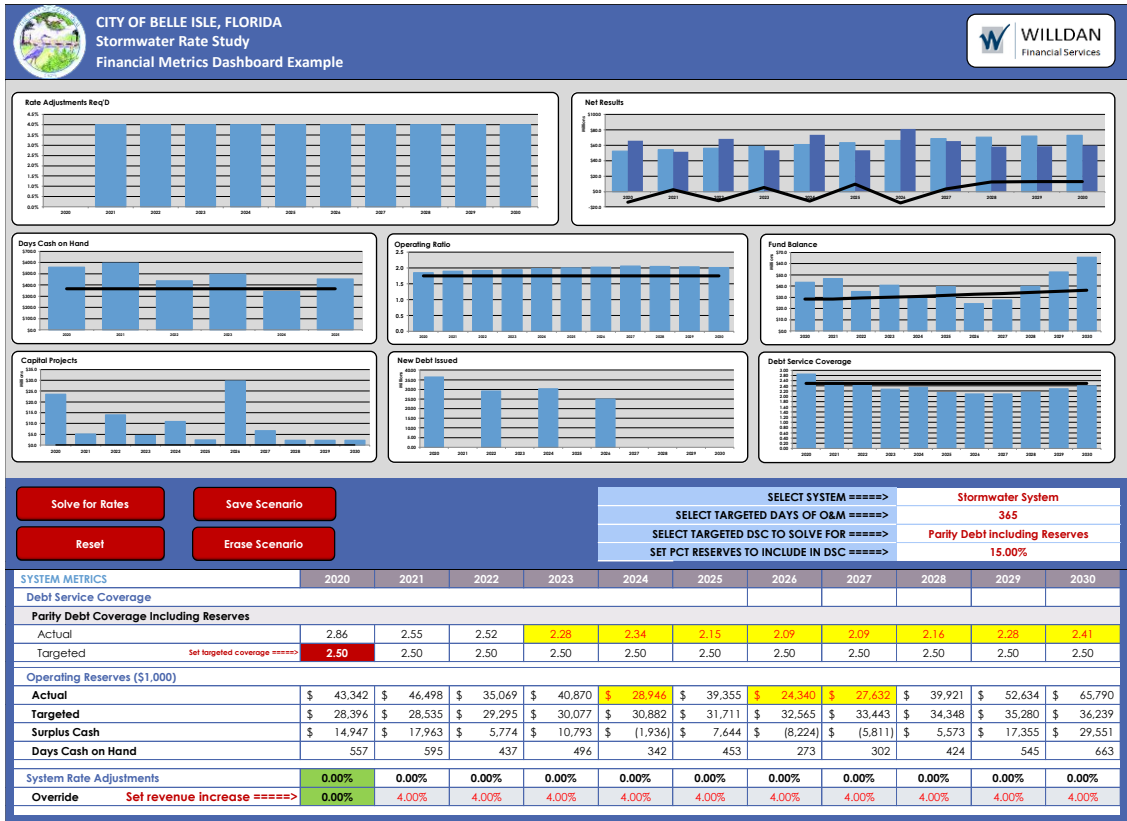
Interactive, “What-If” Model Capability

Our Excel-based rate model possesses the elements necessary to conduct a full financial planning analysis and rate study. The comprehensive analysis model allows us to develop various scenarios regarding such things as: i) capital financing alternatives; ii) debt service coverage tests; and iii) liquidity tests (cash reserves) and modeling of rate structure alternatives to test “what-if” scenarios, to address such questions that may arise during project team meetings with staff or elected officials. This process helps to gain consensus regarding the rate and financial plan which best addresses your needs.

Features of the analysis model include the ability to incorporate line-item data and assumptions that are then summarized in a graphic dashboard to show key financial indicators for the utility system. The sample dashboard below illustrates how the data, assumptions, and calculations are summarized into an easy-to-understand graphical interface that updates with each alternative scenario evaluated.

To summarize, rate model development is an integral part of the Willdan Team consulting process, and one in which staff and other stakeholders play a collaborative roll.

At the completion of the analysis, the model will be customized to generate the financial metrics and targets desired by the City, and ***an Excel version of the model will be provided to the City for use by City staff.*** The ultimate goal is to develop an effective, efficient, and interactive working relationship that will carry forward into future rate-setting processes.



Subsequent to careful development and validation of the baseline forecast, a series of alternative forecasts will be prepared illustrating various results in the following general categories:

- **What if things turn out differently?** These alternatives will demonstrate the sensitivity of the forecast to the significant assumptions used. This results in a sound understanding of areas where a conservative forecast approach is warranted;
- **What happens when we try this?** This series of alternatives focuses on different financial management approaches. For example, the use of different financing techniques such as capitalized interest, interim short-term financing, and capital appreciation bonds may be explored;
- **What can we do to make it better?** This approach to forecasting identifies the factors that may be causing significant rate increases in a given year and explores alternatives. For example, if a large capital project in a single year is the culprit, we would work with staff and the consulting engineers to determine whether this project could be phased or delayed; and
- **How will any adjustments affect our customers?** In examining rate structure alternatives, we will demonstrate and discuss how users in various categories or classifications will be impacted. Our team will use our rate design model to explore the impact of various rate structures on bills for each customer class over the relevant consumption range.

Communication Plan

Taking a proactive role in communicating with stakeholders increases trust in the utility provider, improves the stakeholders' understanding of utility operations and services, and establishes a foundation for future positive relations within the community. Willdan envisions an outreach program that utilizes an effective combination of communication tools, reaching numerous people with a message that accurately reflects the City's goals. We recognize that the presentation of recommendations for rate increases and significant changes in rate structure can be difficult and must be managed with tact, confidence, and honesty.

For over 23 years, Willdan Principal Consultant and Project Manager, Ms. Tara Hollis has been providing presentations to elected officials as well as public workshops. It is an integral part of the rate study project, particularly if the outcome requires changes and/or modifications to the current rates. Willdan believes that the key to a successful presentation is to keep it in "layman's" terms so as not to confuse the audience being presented.

In addition, Willdan has found that the rate study dashboard is a powerful tool that is extremely useful in showing why the results are what they are. Ms. Hollis will be responsible for any presentations and may be accompanied by additional project team members.

Willdan's approach will meet the City's requirements for utility rates that provide revenue sufficiency and equitably recover costs in accordance with common industry standards.

Training






The Willdan Team can provide an immersive and instructionally-sound approach to training and user development. We offer a hands-on training session to staff members responsible for using the rate model as well as post-project phone consultations. Training takes place at the City offices and provides staff members with an opportunity to learn the dynamic interactions of the rate model. In addition, Willdan will be available to provide future training on an hourly basis either at the City offices or via webinar.

Project Management and Quality Assurance/Control Approach

Project Management

At Willdan, we utilize a Project Management Process/Approach that ensures projects are completed on time, within budget and most importantly yield results that match our clients’ expectations. We will document discussions leading to important policy decisions and/or the choice of critical assumptions used in constructing the analysis and model. Following key stakeholder discussions, we will schedule a call to summarize findings and direction with City staff, to make certain that we are in agreement with stated objectives, and that feedback is incorporated as appropriate.

Through the process of providing regular updates and conducting status conference calls, potential issues will be highlighted, discussed, and resolved. Any deviances from the project timeline will be identified and plans will be developed for course corrections. If necessary, changes in approach or strategy will be discussed with City staff, to meet the needs of the City of Belle Isle. In doing this, we will ensure the project stays on track and evolves, based upon current thinking and outside dynamics.

Project Management				
 Define the Project	 Plan the Project	 Manage the Project	 Review the Project	 Communicate the Project
<ul style="list-style-type: none"> Identify the project scope, set objectives, list potential constraints, document assumptions. Define a course of action and develop an effective communication plan. Provide a forum for applying the team’s collective expertise to solving difficult analytical issues that arise in complex projects. 	<ul style="list-style-type: none"> Collaborate with the project team and client staff and agree upon timeline to meet the estimated project timeline. Assign workload functions to appropriately qualified staff to ensure milestones are met, on time. Pre-schedule quality control meetings with project team to maintain the progressive motion of the project. 	<ul style="list-style-type: none"> Manage the execution of the project. Direct existing and upcoming project tasks. Control and monitor work in progress. Provide feedback to client and project team. Identify and resolve deviances from project timeline. 	<ul style="list-style-type: none"> Review all work product and deliverables. Utilize structured quality assurance process involving up to three levels of review at the peer level, project manager level. Procure executive officer level review. 	<ul style="list-style-type: none"> Communicate with the client regarding work status and progress. Ensure client is in receipt of regular status updates. Schedule regular conference calls to touch base. Inform client of roadblocks, work outside of projected scope.

Quality Assurance / Quality Control Process

Our quality control program is incorporated as a required element of Willdan’s day-to-day activities. There are three levels of reviews incorporated for our deliverables:

- 1) Peer review;
- 2) Project Manager review; and
- 3) Final quality assurance manager review.



Peer reviews involve one analyst reviewing the work of another, while project manager reviews are conducted prior to delivery to the quality assurance manager. The quality assurance manager then performs a final review. This ensures that our final product has been thoroughly evaluated for potential errors; thus, providing quality client deliverables, and high levels of integrity and outcomes.

The primary mission of our quality control plan is to provide staff with the technical and managerial expertise to plan, organize, implement, and control the overall quality effort, thereby ensuring the completion of a quality project within the time and budget established.

Quality Assurance Goals		
Goal	Lead	Task
Quality Assurance / Control Process	Jeff McGarvey	<ul style="list-style-type: none"> ▪ Establish a set of planned and systematic actions for maintaining a high level of quality in the professional services performed; Emphasize quality in every phase of work; ▪ Ensure efficient use of resources; ▪ Establish a consistent and uniform approach to the services performed; and ▪ Implement appropriate quality control measures for each work task of the project.
Quality Control Plan	Tara Hollis & Jeff McGarvey	<ul style="list-style-type: none"> ▪ Contract deliverables; ▪ Specific quality control procedures; ▪ Special quality control emphasis; ▪ Budget and manpower requirements; ▪ Overall project schedule and budget; and ▪ Project documentation requirements.

Municipal Advisor Disclosure

Project Disclaimer

The City of Belle Isle further represents, acknowledges, and agrees that:

- (i) The City uses the services of one or more municipal advisors registered with the U.S. Securities and Exchange Commission (“SEC”) to advise it in connection with municipal financial products and the issuance of municipal securities;
- (ii) The City is not looking to Willdan to provide, and City shall not otherwise request or require Willdan to provide, any advice or recommendations with respect to municipal financial products or the issuance of municipal securities (including any advice or recommendations with respect to the structure, timing, terms, and other similar matters concerning such financial products or issues);
- (iii) The provisions of this proposal and the services to be provided hereunder as outlined in the scope of services are not intended (and shall not be construed) to constitute or include any municipal advisory services within the meaning of Section 15B of the U.S. Securities Exchange Act of 1934, as amended (the “Exchange Act”), and the rules and regulations adopted thereunder;
- (iv) For the avoidance of doubt and without limiting the foregoing, in connection with any revenue projections, cash-flow analyses, feasibility studies and/or other analyses Willdan may provide the City with respect to financial, economic or other matters relating to a prospective, new or existing issuance of municipal securities of the City, (A) any such projections, studies and analyses shall be based upon assumptions, opinions or views (including, without limitation, any assumptions related to revenue growth) established by the City, in conjunction with such of its municipal, financial, legal and other advisers as it deems appropriate; and (B) under no circumstances shall Willdan be asked to provide, nor shall it provide, any advice or recommendations or subjective assumptions, opinions or views with respect to the actual or proposed structure, terms, timing, pricing or other similar matters with respect to any municipal financial products or municipal securities issuances, including any revisions or amendments thereto; and
- (v) Notwithstanding all of the foregoing, the City recognizes that interpretive guidance regarding municipal advisory activities is currently quite limited and is likely to evolve and develop during the term of the potential engagement and, to that end, the City will work with Willdan throughout the term of the potential Agreement to ensure that the Agreement and the services to be provided by Willdan hereunder, is interpreted by the parties, and if necessary amended, in a manner intended to ensure that the City is not asking Willdan to provide, and Willdan is not in fact providing or required to provide, any municipal advisory services.

Tab 5 – Experience and Qualifications

Years in Business

Willdan Financial Services has been in business for 34 years; established on June 24, 1988.

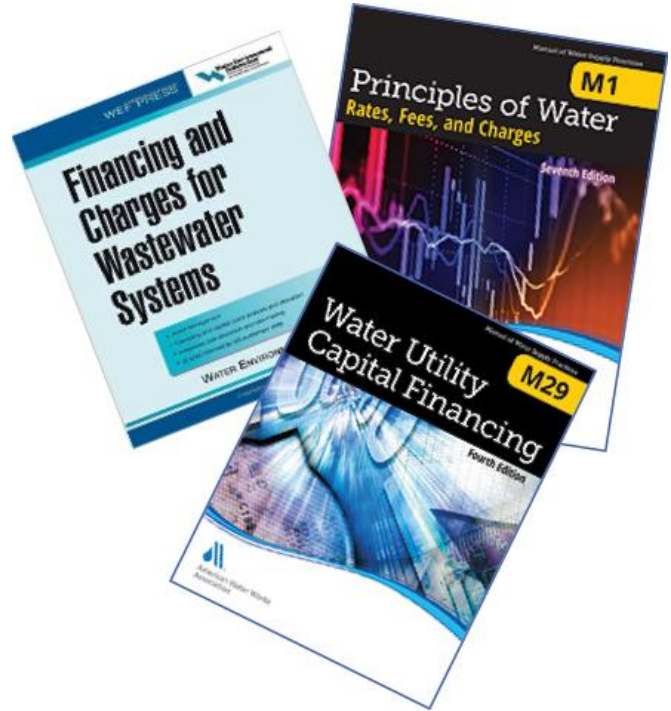
Willdan Utility Rate Experience

Willdan’s professional staff has provided professional consulting services, including financial planning; rate and cost-of-service studies; alternative and feasibility analyses; and operational and management studies for water, reclaimed water, sewer, solid waste, and stormwater utility clients *across the United States for over three decades.*

Additionally, Willdan staff are involved with the development of the rate-setting methodologies set forth in the American Water Works Association (AWWA) M-1 manual “Principles of Water Rates, Fees and Charges,” and the AWWA M-29 manual, “Water Utility Capital Financing.” Willdan is nationally recognized for its expertise with staff frequently being called upon to speak or instruct on utility financial matters, as subject matter experts, including the AWWA Utility Management conference.

Willdan staff is experienced in a broad range of utility planning services; and therefore, understand the importance of an approach that integrates elements of utility planning, engineering, and finance. Willdan Team members possess considerable experience in utility rate and cost-of-service studies and have performed these services for hundreds of utilities throughout the country. Our team includes staff with public sector experience spanning 30 years, and staff on the forefront of utility rate-making and rate-modeling. In addition, team members have held positions as finance directors, deputy city managers, and auditors, and therefore understand the financial, operational, and political realities faced by governmental staff and management; we craft solutions which are sensitive to this.

Our expertise spans across the following utility financial planning services:



Willdan Financial Services Experience and Expertise

- | | |
|--|---|
| <ul style="list-style-type: none"> ▪ Retail and wholesale rate studies ▪ Revenue sufficiency analyses ▪ Utility management and policy assistance ▪ Rate ordinance drafting ▪ Miscellaneous fee and charge studies ▪ Renewal and replacement sufficiency analyses ▪ Comprehensive alternatives analyses ▪ Capital project funding studies | <ul style="list-style-type: none"> ▪ Interactive rate model development with dashboards showing key performance indicators (KPIs) ▪ Connection fee / system development charge studies ▪ CIP financial scenario planning ▪ Billing system validation/rate testing ▪ Bond feasibility reports ▪ Valuation/divestiture studies ▪ Life cycle costs analyses |
|--|---|

Willdan will work with the City to identify, and prioritize operational and fiscal objectives, and match these to specific rate attributes; and use this information throughout the engagement to develop a comprehensive financial plan and design stormwater rates/assessments that effectively meet these goals. The culmination of our analyses will be rate policies that guide the rate setting process, and a financial management plan that develops projected system operating results for the utility for the forecasted period. Willdan will employ its proven interactive approach, coupled with advanced financial modeling techniques to design rates and a financial plan that meets established goals and performance criteria. These modeling techniques serve as a powerful decision-making tool and provide the City with genuine business solutions and recommendations as to the strategic direction of its utility.

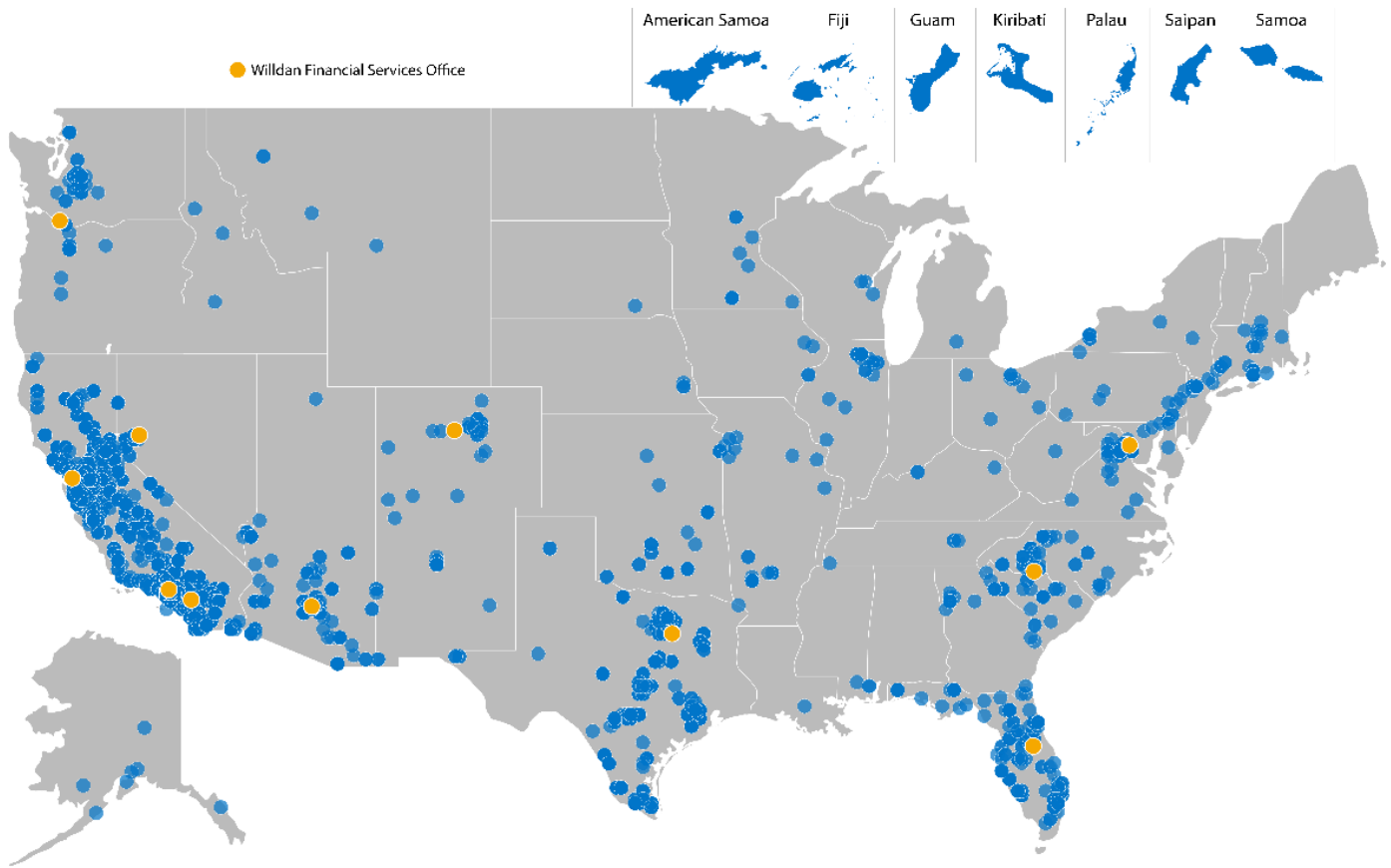
During rate and financial planning projects, we employ tools and techniques, which focus on consensus building among stakeholders to ensure the team understands the future financial implications of current management decisions. Our extensive project expertise is bolstered by our unique interactive financial planning process and model.

National & International Experience

A representation of Willdan’s geographical client presence is depicted below.

DOMESTIC EXPERIENCE

INTERNATIONAL EXPERIENCE



Subconsultant Experience

Inwood's experience and success in providing professional engineering services to government clients over the past 27 years on over 300 stormwater-related task assignments proves our reliability and expertise with this type of contract. Our team has extensive experience on stormwater projects, including: masterplans, watershed management, basin studies, floodplain analysis, stormwater retrofits, water quality, drainage infrastructure inventory, level of service determination, hydrological & hydraulic modeling, stormwater facility design, permitting, GIS analysis, utility rate studies, construction services, and associated public involvement.



The water resources/stormwater group at Inwood is composed of ten graduate engineers: six are Registered Professional Engineers, five are Certified Floodplain Managers, and three have an advanced degree. These staff members are purely focused on providing professional stormwater engineering services (as explained above) separate from Inwood's roadway drainage group.

Inwood is currently providing stormwater management studies, water quality evaluations, master basin studies, stormwater retrofit analysis and design, and capital improvement project design services on several projects for Orange County, Polk County, Seminole County, St. Lucie County, the City of Lake Mary, the City of Oviedo, and others. Thus, we are very familiar with government contracts and stormwater processes required for this project.

In addition, Inwood has provided Professional Stormwater Engineering Services to Orange County Public Works Stormwater Management Division since 2001 as one of their continuing stormwater consultants. As part of those services, Orange County has assigned Inwood to perform the stormwater master plan (SWMP) update for the Boggy Creel Basin. Because we are performing the SWMP update, Inwood already has a deep understanding of the stormwater features and characteristics within the City of Belle Isle (located within the Boggy Creek Basin). As part of those efforts, we have already mapped the existing drainage infrastructure, delineated subbasins, formulated the existing conditions hydrologic and hydraulic model network, and evaluated the mapped impervious surface areas.

Inwood also performed an analysis of Orange County's Joint Use Ponds. The County contracted with Inwood to scientifically assess stormwater management fees for the service offered by each identified joint use stormwater pond within the County. The project involved evaluating existing GIS layers for the County to develop the runoff characteristics for each pond site. ArcGIS tools were used to calculate the weighted runoff curve numbers based on existing land use and soil characteristics. The runoff characteristics were then exported out of ArcGIS and imported into a hydrologic model (ICPR v3.1) to calculate the total volume of stormwater runoff contributing to each pond site. Detailed graphics for each pond site and contributing area were developed within ArcGIS and assimilated into a project report.

This experience and knowledge of the area will be an advantage to the City if selected to perform the utility rate study.

Similar Studies

Listed below are representative projects for whom the proposed Willdan Project Team have provided stormwater utility rate and financial consulting service and impervious area and engineering consulting analyses. The following demonstrate similar projects as requested in the City's RFP. If desired, additional reference projects are available upon request.

Willdan Financial Services Experience

City of Oviedo, Florida Stormwater Rate Study

Willdan has been providing utility system and general financial services to the City of Oviedo since October 2013. As part of the continuing services agreement, in late 2016, the City of Oviedo requested that Willdan develop a revenue sufficiency analysis for the City's Stormwater System ("System"). The revenue sufficiency analysis culminated in a projection of revenue requirements for the stormwater utility over a five-year forecast period such that the required operating expenses, debt service, minor and major capital expenses and transfers can be funded with the various reserves, revenue, including rate revenue, of the System. Additionally, the revenue sufficiency analysis identified additional rate revenue required to maintain the annual reserve levels and debt service coverage requirements desired by the utility as a management policy or had agreed to maintain as part of any outstanding debt instruments.

Our approach included the incorporation of the City's operating and capital budget, bond and State Revolving Fund (SRF) loan obligations, customer (ERU) growth assumptions, and other assumptions into the rate model.

Key objectives of the revenue sufficiency analysis included development of a utility financial plan which resulted in the following for the stormwater utility: 1) Generation of sufficient revenues to fund costs and meet management policies and goals; 2) Maintenance of adequate reserve levels; 3) Maintenance of adequate annual debt service coverage; 4) Ability to fund major and minor capital projects; 5) Projection of new debt required to fund major capital projects; and 6) Reconciliation of all fund balances and proposed capital project funding.

A key consideration of this analysis was the City's desire to acquire the Twin Rivers Golf Course. The golf course was considered a strategic asset that would greatly benefit the City's stormwater system. Willdan worked closely with the City's staff and its financial advisor to develop a financial plan and analyze multiple stormwater rate scenarios which were subsequently presented to City Council. Willdan is in the process of preparing an update to the stormwater rate study to be implemented for Fiscal Year 2024.

City of DeLand, Florida Stormwater Utility Rate Study

Willdan was selected by the City of DeLand to prepare an update to their existing stormwater rates and charges and make recommendations for rate structure, billing and collection methodology and overall rate adjustments through Fiscal Year 2020. As part of this study, Willdan reviewed stormwater utility budgets, the capital improvements program, list of programmed and unprogrammed capital projects, and existing and proposed debt. Additionally, Willdan had to review the current billing data and correlated it to the Volusia County Property Appraiser data for all parcels within the County limits. This was utilized to confirm ownership of the property as well as to verify the square footage allowance for a typical Equivalent Stormwater Unit.

The City was utilizing a hybrid billing method to charge and collect the stormwater rate. As part of the update, Willdan reviewed different billing and collection methods including an annual non-ad valorem assessment included on the property tax bill, an independent billing method to be billed quarterly to the property owner, and the utility bill method billed monthly to the occupant of the property. Additionally, Willdan reviewed the City's tiered rate structure for its residential customer class for any adjustments that might be necessary based on updated parcel information provided by the Volusia County Property Appraiser.

Willdan utilized its dynamic rate and financial proforma model to develop projections of annual revenue requirements for system operation and maintenance, capital projects, debt service, and required reserves. This model allowed Willdan to run various rate implementation scenarios with the City including impacts on customers, fund balances, Capital Improvement Plan funding, and debt service coverage.

City of Lexington, North Carolina Stormwater Utility Fee Study

Like many communities in the State of North Carolina (the “State”) and throughout the country, the City of Lexington has seen an increase in stormwater management costs related to planning and implementing water quality improvements resulting from State and federal regulatory drivers. The City determined that the solution to address these increasing costs is to establish the stormwater utility system as an enterprise fund similar to its other utility operations. As part of this process, the City retained Willdan to prepare a Stormwater Fee Study to develop and establish fees for the stormwater utility system.

The study included: 1) calculation of an equitable, cost-based fee structure; 2) recommendation of multi-year fee adjustments as necessary to provide for full cost recovery; 3) consideration of various billing/collection methodologies for implementation of the fees, and 4) consideration of a tiered rate structure for single-family residential customers. The goal of the study was to assist the stormwater system in generating revenue sufficiency to support the anticipated operating costs, maintenance expenditures and capital improvement initiatives.

The study, to the extent practical, utilized a cost-of-service approach to establish fees based on the needs of the community and the system. Willdan utilized its dynamic rate and financial proforma model and incorporated available data to: (i) identify the number of equivalent residential units based on an impervious area method; (ii) delineate budget year and projected expenditure requirements for the stormwater system; and (iii) identify the resulting level of stormwater fees based on the assumed expenditures for fiscal year ending June 30, 2021, and the remainder of the Projection Period through June 30, 2025. In addition to workshop presentations to the City Council, Willdan participated in community outreach and education meetings regarding the need for a stormwater system and the development and implementation of the proposed stormwater fee. Willdan is also working with the City to develop the final billing register for the utility and incorporate the register into the City’s utility billing system.

City of Mount Pleasant, South Carolina Stormwater Fee Study

Willdan was retained by the Town of Mount Pleasant, South Carolina to prepare a stormwater fee rate structure analysis. The Town currently includes stormwater program fees on the annual tax bill. Single-family residential customers are billed a flat rate. While commercial customers are billed based on a run-off coefficient based on property use. As part of this project, Willdan evaluated the current stormwater fee ordinance and recommended updates where needed based upon applicable state code and regulatory references; and an assessment of the current Equivalent Residential Unit (“ERU”) for industry consistency and applicability to the Town and with other local municipalities. In addition, Willdan created a technically defensible structured tier fee schedule for residential customers that takes into consideration the improved square footage, building footprint and other impervious features, and size of lot in determining applicable fees. This task included review of the property records for each parcel and a GIS analysis of the impervious surface.

Willdan also worked with the Charleston County Revenue Collections Department to ensure the proposed tiered fee structure could be accommodated by the County’s billing system and prepared the certified billing roll for the fiscal year. Willdan has continued to prepare the annual stormwater fee list to be provided to the County for inclusion on the tax bill.

City of Dunn, North Carolina

Stormwater Utility Fee Study (FY 2022)

The City of Dunn, North Carolina currently charges a flat monthly rate for residential and non-residential stormwater customers. The City retained Willdan to develop updated rates and charges for the non-residential customers that take into account the stormwater burden created by the non-residential parcels. As part of this project, Willdan performed a statistical analysis to develop a standard Equivalent Residential Unit (ERU) based on the impervious area of a typical, single-family residential property. Willdan also used GIS to develop an impervious area layer for all non-residential parcels. All single-family residential properties will be charged based on 1 EBU per dwelling unit and all non-residential parcels will be based on impervious area divided by the typical square foot allowance per ERU times the rate per ERU. Additionally, the City is currently billing customers monthly on the utility bill. Willdan worked with the City and the County to recommend the stormwater fee be placed on the annual Tax Bill and be collected by the County. This will allow for greater saturation of the fee as the City can now collect from both utility and non-utility customer parcels.

City and County of Denver, Colorado

Storm Drainage Impact Fee Study and Benchmarking Analysis

The City and County of Denver's ("City") stormwater system is completely separate from the sanitary sewer system, and stormwater is not processed or treated before it is discharged to waterways. The City maintains different types of stormwater management facilities such as retention ponds, grassy swales and other kinds of buffers that help naturally filter out pollutants before they hit the waterways and works with residents to reduce pollutants before they reach the stormwater system. In order to preserve the health of neighborhoods and larger waterways, the City needed to implement new treatment methods.

To mitigate the impacts caused by impervious surfaces, the City is prioritizing new green infrastructure projects, using parks, open space areas, and urban design to create networks that filter water for natural treatment before being discharged to waterways. The City is facing large capital expenditures to the storm drainage system and is looking to fund the growth-related portions of capital costs through an impact fee. Willdan was engaged to prepare such a study. The project team developed the methodology to best address the existing and/or replacement facilities. The team conducted a survey of other like agencies and how they compare, as well as formulating unique solutions to the complex issues that face the City.

Inwood Consulting Engineers, Inc. Experience

Orange County, Florida Joint Use Ponds Assessment

The Orange County Public Works Stormwater Management Division has a comprehensive asset inventory program for the County-owned and maintained stormwater ponds. Part of the inventory program includes evaluating properties that contribute runoff to Orange County-maintained ponds. The County contracted with Inwood to scientifically assess stormwater management fees for the service offered by each identified stormwater pond within the County. The project involved evaluating existing GIS layers for the County to develop the runoff characteristics for each pond site. ArcGIS tools were used to calculate the weighted runoff curve numbers based on existing land use and soil characteristics. The runoff characteristics were then exported out of ArcGIS and imported into a hydrologic model (ICPR v3.1) to calculate the total volume of stormwater runoff contributing to each pond site. Detailed graphics for each pond site and contributing area were developed within ArcGIS, exported to a Portable Document Format (PDF), and assimilated into a project report. As prime consultant for this project, Inwood was responsible for GIS data collection, management and processing, hydrologic modeling, graphics preparation, and report writing.

Orange County, Florida Boggy Creek Basin HydroNetwork

The Boggy Creek Basin encompasses approximately 85 square miles located in south-central Orange County. Boggy Creek drains south through the County, eventually discharging to East Lake Tohopekaliga in Osceola County. Within Orange County, the watershed is roughly bounded by Orange Blossom Trail / U.S. 441 to the west, Michigan Street to the north, and Goldenrod Road / State Road 551 to the east. Orange County Stormwater Management Division has engaged in an effort to modernize and update their Major Basin Stormwater Management Master Plans (SWMMP).

This project included data collection, desktop review, and field reconnaissance to map drainage infrastructure in portions of the Boggy Creek Watershed. Over 1,847 documents from SJRWMD, SFWMD, FDOT and Orange County were collected and reviewed. Drainage infrastructure (over 33,000 features) were digitized into GIS geodatabase (SFWMD GWIS schema) and source documents were hyperlinked to create an interactive dataset. Documents were carefully organized and information, including document source, age, data content, and data quality, were recorded to facilitate planning and identification of infrastructure survey needs. The project was initiated in August 2016 and completed in December 2019. Since this project, several other related task authorizations have been completed and/or initiated.

Orange County, Florida Swann Lake Stormwater Pump Station Study

The purpose of the Swann Lake Pump Station Study project was to develop a comprehensive drainage and flood level of service evaluation of the watershed including floodplain delineation and stormwater pump station evaluation. The project area is in central Orange County, Florida (Section 25, Township 23S, Range 29E), northeast of the intersection of Sand Lake Road and Orange Avenue and west of Lake Conway.

For this project, Inwood performed a study of the watershed area and pump station to develop a comprehensive drainage and flood level of service evaluation of the watershed, including hydrologic and hydraulic assessment of the primary drainage system, pump station, and forcemain. Inwood also performed an engineering assessment of the pump station operation and maintenance conditions and determined that the existing pumps and their configurations did not meet the level of service requirements for Swann Lake, although they were essential for drawing down lake stages.

Recommended improvements included upsizing the forcemain and downstream receiving manhole/cross drain to a larger diameter that would be better suited for the discharges measured from the existing pumps and allow for easier maintenance and inspection by the County. Additional recommendations included lowering float switches to improve stages for smaller storms and further analysis for potential conveyance improvements along Perkins Road.

Orange County, Florida

CRS Open Space Preservation Analysis

For this predominantly GIS-driven project, Inwood analyzed all parcels in unincorporated County areas and reviewed them for compatibility with the open space criteria established by the FEMA National Flood Insurance Program (NFIP) Community Rating System (CRS) coordinator's manual. Selected parcel sets were created based on the property appraiser's parcel database and the location of parcels relative to jurisdictional boundaries, DFIRM delineations, public lands, and regulatory data. A final selected set was developed for individual review to confirm ownership and verify against aerial imagery. Final selected parcels were flagged as qualifying for one or more of six potential criteria for which a specific amount of points can be earned toward the Community's rating. Points are calculated for each category type based on various weighting factors set by the CRS manual for each criterion. A series of models in ArcToolbox were set up to calculate the total points available for open space areas within unincorporated Orange County. All supporting documentation was compiled electronically and hyperlinked to the selected parcel features for accessibility through ArcMap.

Orange County, Florida

Orange County Continuing Stormwater Contract

Inwood has delivered County-wide Consulting Stormwater Professional Engineering Services for Orange County since 2001 and has been selected six consecutive times for this contract. The project assignments included engineering analysis and design of over 250 projects throughout the County.

Sample projects delivered under this contract include:

- B-14 Boggy Creek Pipeline Improvements
- Boggy Creek Basin HydroNetwork
- Cardinal Park Drainage Improvements
- Evergreen Park Drainage Improvements
- Lake Apopka Watershed Model Migration
- Lake George Outfall Study
- Lake Holden Alum Treatment System Upgrades
- Lake Serene Drainage Well Replacement
- Park Manor Estates Underdrain Improvements
- Porter Road Retaining Wall Replacement
- Swann Lake Pump Station Study
- Barry Street Drainage Improvements
- Bridge No. 754003 Bates Road Repairs
- Central Florida Parkway Pavement Distress Evaluation
- Lake Gandy Water Quality Improvements
- Lake Hart Watershed Subbasin and Model Network
- Lake Killarney Bank Stabilization Assessment
- Park Manor Canal Piping Segment B
- Peer Review of SWMMP Deliverables
- Quail Hollow Subdivision Drainage Improvements
- Voltaire Drive Culvert Repairs

List of Similar Projects

A representative listing of projects in the Southeast performed by Willdan and its project team members is provided on the pages that follow, which are similar in nature to those being requested by the City. Our proposed project team has been providing rate and financial consulting services to municipalities across the country for more than 30 years.

Willdan Project Team Experience		Affordability	Capital Funding	Debt Issuance Support	Capacity/Impact Fees	Model Development	Rate Structure	Rate Study	Regionalization	Revenue Enhancement	Scenario & Risk Analysis	Miscellaneous Fees	Testimony	Wholesale Rates
State	Entity													
FL	Alachua, County of		✓			✓	✓							
FL	Apopka, City of	✓	✓	✓	✓		✓	✓			✓	✓		
FL	Atlantic Beach, City of	✓	✓		✓	✓	✓	✓			✓			
FL	B&C Water Resources, LLC	✓	✓		✓	✓	✓	✓		✓	✓	✓	✓	
FL	Bartow, City of				✓							✓		
FL	Bay Laurel CDD	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
FL	Bay, County of	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
FL	Bluefield Utilities, LLC	✓	✓		✓	✓	✓	✓		✓	✓	✓	✓	
FL	Callaway, City of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Cape Coral, City of	✓	✓				✓	✓		✓	✓			
FL	Carrabelle, City of	✓	✓				✓	✓		✓	✓			
FL	Casselberry, City of	✓	✓			✓	✓	✓		✓	✓		✓	
FL	Citrus, County of		✓			✓	✓	✓			✓		✓	
FL	Clay, County of	✓	✓				✓	✓		✓	✓			
FL	Clearwater, City of		✓		✓							✓		
FL	Clermont, City of		✓			✓	✓	✓			✓			
FL	D&E Water Resources, LLC	✓	✓		✓	✓	✓	✓		✓	✓	✓	✓	
FL	Dade City, City of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Dania Beach, City of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	DeFuniak Springs, City of	✓	✓				✓	✓		✓	✓			
FL	DeLand, City of	✓	✓		✓	✓	✓	✓		✓	✓	✓		
FL	Delray Beach, City of		✓			✓	✓	✓						
FL	Deltona, City of		✓			✓	✓	✓			✓			
FL	DeSoto, County of	✓	✓				✓	✓		✓	✓			
FL	Dunedin, City of	✓	✓				✓	✓		✓	✓			
FL	Emerald Coast Utilities Authority	✓	✓				✓	✓		✓	✓			
FL	Eustis, City of		✓			✓	✓	✓			✓			
FL	Farmton Water Resources, LLC	✓	✓		✓	✓	✓	✓		✓	✓	✓	✓	
FL	Fellsmere, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	
FL	Fernandina Beach, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓			
FL	Florida Governmental Utility Authority	✓	✓			✓	✓	✓		✓	✓			
FL	Fort Lauderdale, City of													

Willdan Project Team Experience		Affordability	Capital Funding	Debt Issuance Support	Capacity/Impact Fees	Model Development	Rate Structure	Rate Study	Regionalization	Revenue Enhancement	Scenario & Risk Analysis	Miscellaneous Fees	Testimony	Wholesale Rates
State	Entity													
FL	Fort Meade, City of	✓	✓		✓	✓	✓	✓		✓	✓	✓		
FL	Fort Myers Beach, City of	✓	✓		✓	✓	✓	✓		✓	✓	✓		
FL	Fort Myers, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Fort Walton Beach, City of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Gateway Services Community Development District	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Grove Land Utilities, LLC	✓	✓		✓	✓	✓	✓		✓	✓	✓	✓	
FL	Gulf Breeze, City of	✓	✓				✓	✓		✓	✓			
FL	Hernando, County of	✓	✓	✓			✓	✓		✓	✓			
FL	Hialeah, City of		✓			✓	✓	✓			✓			
FL	Hillsborough, County of					✓	✓	✓		✓	✓			
FL	Jacksonville Electric Authority	✓	✓				✓	✓		✓	✓			
FL	Kissimmee, City of	✓	✓	✓			✓	✓		✓	✓			
FL	Lake Hamilton, Town of				✓							✓		
FL	Lake Wales, City of	✓	✓	✓	✓		✓	✓		✓	✓			
FL	Lake Worth, City of					✓					✓		✓	
FL	Lakeland, City of	✓	✓				✓	✓		✓	✓			
FL	Lauderhill, City of	✓	✓		✓		✓	✓		✓	✓			
FL	Leesburg, City of		✓	✓		✓					✓			
FL	Longboat Key, Town of				✓	✓							✓	
FL	Longwood, City of	✓	✓				✓	✓		✓	✓			
FL	Madison, City of	✓	✓				✓	✓		✓	✓			
FL	Marco Island, City of					✓	✓	✓			✓			
FL	Marion, County of	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		
FL	Miami Springs, City of	✓	✓		✓		✓	✓		✓	✓			
FL	Miami-Dade Solid Waste		✓			✓				✓	✓	✓		
FL	Miami-Dade Water and Sewer	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		
FL	Mulberry, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓			
FL	Naples, City of	✓	✓		✓		✓	✓		✓	✓			
FL	Nassau County											✓		
FL	Nassau - Amelia Island Utilities					✓	✓	✓			✓			
FL	Neptune Beach, City of	✓	✓				✓	✓		✓	✓			
FL	New Port Richey, City of	✓	✓				✓	✓		✓	✓			
FL	North Bay Village, City of	✓	✓		✓		✓	✓		✓	✓			
FL	North Beach Utilities	✓	✓		✓		✓	✓		✓	✓			
FL	North Lauderdale, City of	✓	✓		✓		✓	✓		✓	✓			
FL	North Miami Beach, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		

Willdan Project Team Experience		Affordability	Capital Funding	Debt Issuance Support	Capacity/Impact Fees	Model Development	Rate Structure	Rate Study	Regionalization	Revenue Enhancement	Scenario & Risk Analysis	Miscellaneous Fees	Testimony	Wholesale Rates
State	Entity													
FL	North Peninsula Utility Company					✓	✓	✓			✓			
FL	North Port, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Ocala, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Ocoee, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Okaloosa, County of	✓	✓			✓	✓	✓		✓	✓			
FL	Okeechobee Utility Authority	✓	✓	✓		✓	✓	✓		✓	✓			
FL	Orange City, City of	✓	✓		✓	✓	✓	✓		✓	✓	✓		
FL	Orange, County of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	OrangeTree Utilities, Inc.	✓	✓			✓	✓	✓		✓	✓			
FL	Orlando, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Oviedo, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Palm Bay, City of	✓	✓	✓		✓	✓	✓		✓	✓			
FL	Palm Beach, County of					✓	✓	✓			✓			
FL	Panama City, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Parkland, City of				✓							✓		
FL	Peace River Manasota Regional Water Supply Authority		✓	✓		✓					✓			
FL	Pinellas Park, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Polk City, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		
FL	Polk, County of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Port Richey, City of					✓	✓	✓			✓			
FL	Port St. Lucie, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓			
FL	Punta Gorda, City of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Riviera Beach, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Rolling Oaks Utilities					✓	✓	✓			✓			
FL	Sanibel, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓			
FL	Sarasota, City of	✓	✓			✓	✓	✓			✓			
FL	Sarasota, County of	✓	✓			✓	✓	✓		✓	✓			
FL	South Daytona, City of	✓	✓		✓	✓	✓	✓			✓	✓	✓	
FL	Southwest Ranches	✓	✓	✓	✓	✓	✓	✓		✓	✓			
FL	St Johns River Water Management District					✓					✓			
FL	St. Johns Service Company	✓	✓			✓	✓	✓		✓	✓			
FL	St. Johns, County of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Stuart, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Tamarac, City of	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Tampa Bay Water		✓	✓		✓					✓			
FL	Tarpon Springs, City of	✓	✓	✓		✓	✓	✓			✓			

Willdan Project Team Experience		Affordability	Capital Funding	Debt Issuance Support	Capacity/Impact Fees	Model Development	Rate Structure	Rate Study	Regionalization	Revenue Enhancement	Scenario & Risk Analysis	Miscellaneous Fees	Testimony	Wholesale Rates
State	Entity													
FL	Tindall Hammock Irrigation and Soil Conservation District	✓	✓		✓	✓	✓	✓		✓	✓	✓	✓	
FL	Tohopekaliga Water Authority	✓	✓	✓		✓	✓	✓		✓	✓			
FL	Tymber Creek Utilities Incorporated	✓	✓		✓	✓	✓	✓		✓	✓			
FL	Volusia Water Alliance					✓								
FL	Winter Haven, City of	✓	✓			✓	✓	✓		✓	✓			
FL	Winter Park, City of					✓							✓	
FL	Woodstock Utilities, LLC	✓	✓		✓	✓	✓	✓		✓	✓	✓	✓	
GA	Cobb County, GA	✓	✓	✓		✓	✓	✓		✓	✓			
GA	DeKalb, County of	✓	✓	✓		✓	✓	✓		✓	✓			
GA	Glynn, County of	✓	✓	✓		✓	✓	✓			✓			
GA	Jefferson, City of		✓			✓	✓	✓						
LA	Bastrop Peoples of Bastrop		✓	✓										
LA	New Orleans, City of					✓							✓	
NC	Albemarle, City of	✓	✓			✓	✓	✓		✓	✓			
NC	Apex, Town of		✓	✓		✓	✓	✓		✓	✓			
NC	Belmont, City of			✓		✓	✓	✓			✓			
NC	Bessemer City, City of			✓		✓	✓	✓			✓			
NC	Broad River Water Authority	✓	✓	✓		✓	✓	✓		✓	✓			
NC	Cape Fear Public Utility Authority	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		
NC	Cape Fear Water District		✓			✓	✓	✓			✓			
NC	Carolina Beach, Town of	✓	✓			✓	✓	✓		✓	✓			
NC	Cherryville, City of		✓			✓	✓	✓			✓			
NC	Concord, City of	✓	✓	✓		✓	✓	✓		✓	✓		✓	
NC	Cramerton, Town of					✓	✓	✓			✓			
NC	Dallas, Town of					✓		✓					✓	✓
NC	Dunn, City of			✓		✓								
NC	Durham, County of				✓	✓					✓			
NC	Elon, Town of					✓	✓	✓						
NC	Fayetteville, City of		✓	✓		✓	✓	✓			✓			
NC	French Broad Electric Cooperative						✓	✓					✓	✓
NC	Fuquay-Varina, Town of				✓	✓	✓	✓						
NC	Gaston County		✓			✓	✓	✓	✓		✓			
NC	Gastonia, City of	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
NC	Greensboro, City of	✓	✓	✓		✓	✓	✓		✓	✓			
NC	Greenville Utilities Commission	✓	✓	✓		✓	✓	✓		✓	✓		✓	

Willdan Project Team Experience		Affordability	Capital Funding	Debt Issuance Support	Capacity/Impact Fees	Model Development	Rate Structure	Rate Study	Regionalization	Revenue Enhancement	Scenario & Risk Analysis	Miscellaneous Fees	Testimony	Wholesale Rates
State	Entity													
NC	Harnett, County of	✓	✓	✓		✓								
NC	Harrisburg, City of					✓	✓	✓						
NC	Henderson, City of	✓	✓	✓		✓	✓	✓		✓	✓			
NC	Hickory, City of	✓	✓			✓	✓	✓		✓	✓			
NC	High Point, City of	✓	✓	✓		✓	✓	✓		✓	✓			
NC	High Shoals, Town of			✓		✓								
NC	Hillsborough, Town of			✓		✓								
NC	Jacksonville, City of					✓	✓	✓						
NC	Johnston, County of		✓		✓	✓	✓	✓		✓	✓			
NC	Kannapolis, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓			
NC	Kings Mountain, City of	✓	✓	✓		✓	✓	✓		✓	✓		✓	
NC	Kinston, City of	✓	✓			✓	✓	✓		✓	✓			
NC	Lexington, City of	✓	✓			✓	✓	✓		✓	✓			
NC	Lincoln County	✓	✓			✓	✓	✓		✓	✓			
NC	Lincolnton, City of	✓	✓	✓		✓	✓	✓		✓	✓			
NC	Lowell, City of		✓			✓	✓	✓			✓			
NC	Lower Cape Fear Water & Sewer Authority	✓	✓			✓	✓	✓		✓	✓			
NC	McAdenville, Town of			✓		✓			✓					
NC	Metropolitan Sewerage District of Buncombe County	✓	✓	✓		✓	✓	✓		✓	✓			
NC	Monroe, City of	✓	✓	✓		✓	✓	✓		✓	✓		✓	
NC	Mooresville, Town of	✓	✓	✓	✓	✓	✓	✓		✓	✓			
NC	Morganton, City of	✓	✓			✓	✓	✓		✓	✓			
NC	Mount Airy, City of	✓	✓			✓	✓	✓		✓	✓			
NC	Mount Holly, City of		✓			✓	✓	✓			✓			
NC	New Hanover County	✓	✓	✓		✓	✓	✓		✓	✓			
NC	New River Light & Power Co.					✓								✓
NC	Onslow County Water & Sewer Authority	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
NC	Orange Water & Sewer Authority		✓	✓		✓	✓	✓			✓			
NC	Raleigh, City of	✓	✓			✓	✓	✓		✓	✓			
NC	Ranlo, Town of			✓		✓			✓					
NC	Rocky Mount, City of					✓							✓	
NC	Shelby, City of	✓	✓	✓		✓	✓	✓		✓	✓			
NC	Spencer Mountain, Town of			✓		✓								
NC	Thomasville, City of	✓	✓	✓		✓	✓	✓		✓	✓			
NC	Stanley, Town of			✓		✓								

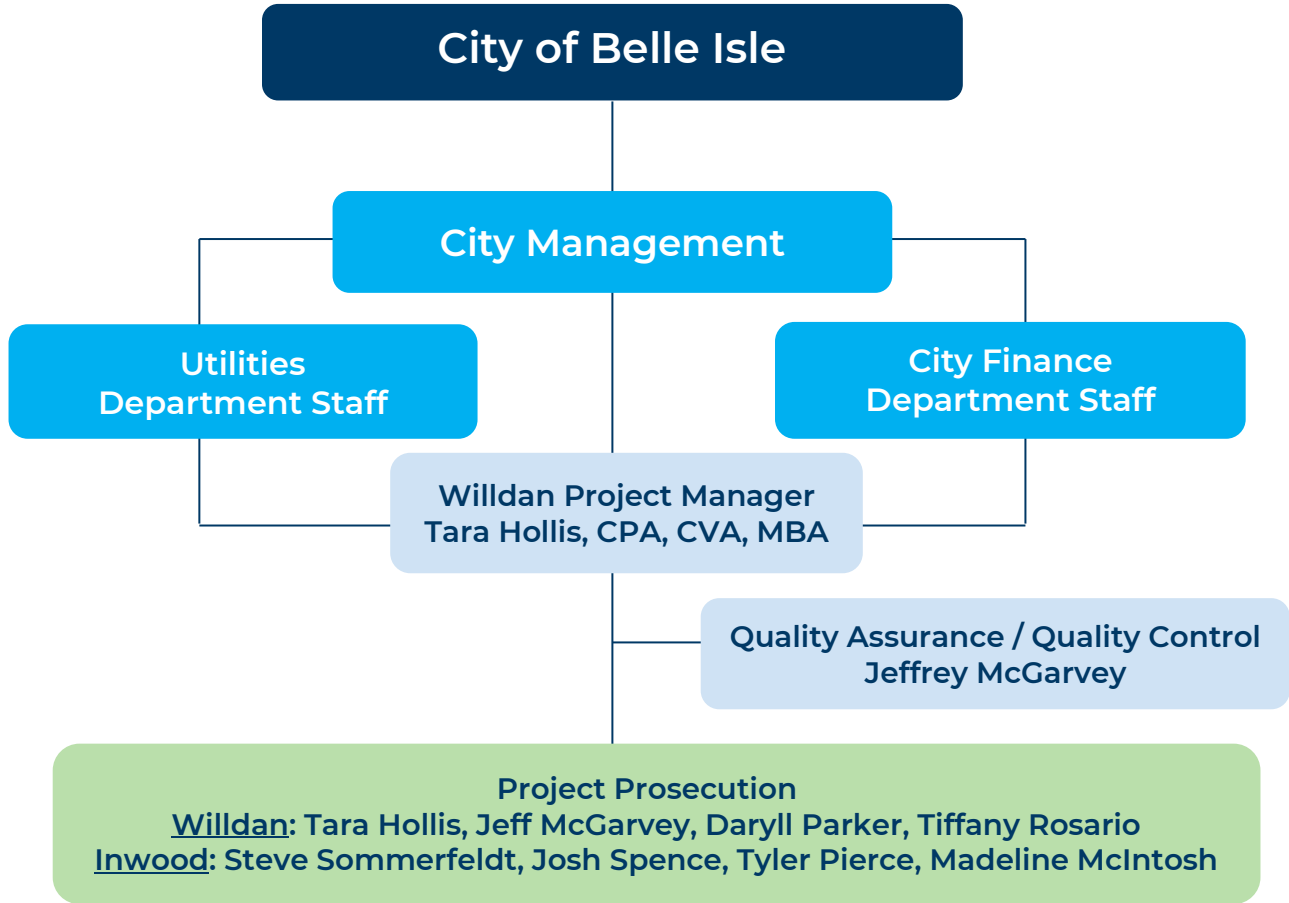
Willdan Project Team Experience		Affordability	Capital Funding	Debt Issuance Support	Capacity/Impact Fees	Model Development	Rate Structure	Rate Study	Regionalization	Revenue Enhancement	Scenario & Risk Analysis	Miscellaneous Fees	Testimony	Wholesale Rates
State	Entity													
NC	Union, County of	✓	✓	✓	✓	✓	✓	✓		✓	✓			
NC	Wake, County of	✓	✓			✓	✓	✓		✓	✓			
NC	Wilson, City of												✓	
NC	Winston-Salem, City of	✓	✓	✓		✓	✓	✓		✓	✓			
NC	Winterville, Town of													✓
SC	Abbeville, City of		✓			✓	✓	✓			✓			
SC	Aiken					✓	✓	✓						
SC	Anderson, City of	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
SC	Beaufort Jasper Water & Sewer Authority		✓			✓	✓	✓			✓			
SC	Beaufort, City of	✓	✓			✓	✓	✓		✓	✓			
SC	Bennettsville, City of	✓	✓	✓		✓	✓	✓		✓	✓		✓	
SC	Berkeley County Water & Sanitation	✓	✓			✓	✓	✓		✓	✓			
SC	Camden, City of					✓	✓	✓					✓	✓
SC	Cayce, City of	✓	✓	✓		✓	✓	✓		✓	✓			
SC	Cheraw, City of					✓	✓	✓						
SC	Clemson, City of	✓	✓			✓	✓	✓		✓	✓			
SC	Clinton, City of	✓	✓			✓	✓	✓		✓	✓			
SC	Clover, Town of	✓	✓		✓	✓	✓	✓		✓	✓			
SC	Columbia, City of	✓	✓		✓	✓	✓	✓		✓	✓			
SC	Dorchester County	✓	✓		✓	✓	✓	✓		✓	✓			
SC	Due West, Town of					✓	✓	✓					✓	✓
SC	Easley Combined Utility System	✓	✓	✓		✓	✓	✓		✓	✓			
SC	East Richland County PSD					✓	✓	✓						
SC	Florence, City of	✓	✓	✓	✓	✓	✓	✓		✓	✓			
SC	Folly Beach, City of					✓	✓	✓						
SC	Fort Mill, Town of	✓	✓		✓	✓	✓	✓		✓	✓			
SC	Gaffney Board of Public Works	✓	✓			✓	✓	✓		✓	✓			
SC	Georgetown, City of	✓	✓			✓	✓	✓		✓	✓			✓
SC	Goose Creek, City of					✓	✓	✓						
SC	Greenville Water System	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		
SC	Greenwood Commission of Public Works	✓	✓	✓	✓	✓	✓	✓		✓	✓		✓	
SC	Greenwood Metropolitan District	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		
SC	Greer Commission of Public Works	✓	✓	✓	✓	✓	✓	✓		✓	✓			
SC	Hilton Head Public Service District	✓	✓	✓		✓	✓	✓			✓			

Willdan Project Team Experience		Affordability	Capital Funding	Debt Issuance Support	Capacity/Impact Fees	Model Development	Rate Structure	Rate Study	Regionalization	Revenue Enhancement	Scenario & Risk Analysis	Miscellaneous Fees	Testimony	Wholesale Rates
State	Entity													
SC	James Island PSD					✓	✓	✓			✓			
SC	Laurens Commission of Public Works					✓	✓	✓		✓				
SC	Lexington County Joint Municipal Water & Sewer Comm.	✓	✓		✓	✓	✓	✓		✓	✓			
SC	Lowcountry Regional Water System	✓				✓	✓		✓	✓				
SC	Newberry, City of	✓	✓	✓		✓	✓	✓		✓	✓			
SC	North Augusta, City of	✓	✓			✓	✓	✓		✓	✓			
SC	North Charleston Sewer District	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
SC	Pickens, City of	✓	✓			✓	✓	✓		✓	✓			
SC	Prosperity					✓	✓	✓			✓			
SC	ReWa (Greater Greenville, SC Wastewater)	✓	✓		✓	✓	✓	✓	✓	✓	✓			
SC	Richland, County of		✓		✓	✓	✓	✓			✓			
SC	Rock Hill, City of	✓	✓		✓	✓	✓	✓		✓	✓			
SC	Saluda CPW					✓	✓	✓			✓			
SC	SJWD Water District	✓	✓		✓	✓	✓	✓		✓	✓			
SC	Sumter, City of	✓	✓	✓		✓	✓	✓		✓	✓			
SC	Tega Cay, City of					✓			✓		✓			
SC	Union, City of	✓	✓			✓	✓	✓		✓	✓			
SC	Winnsboro, Town of					✓	✓	✓						
SC	Woodruff Roebuck Water District	✓	✓	✓		✓	✓	✓		✓	✓			
SC	York, City of	✓	✓		✓	✓	✓	✓		✓	✓			
TN	Brentwood, City of		✓			✓	✓	✓			✓			
VA	Arlington, County of	✓	✓		✓	✓	✓	✓		✓	✓			
VA	Danville, City of	✓	✓			✓	✓	✓		✓	✓			
VA	Henrico, County of	✓	✓			✓	✓	✓		✓	✓			
VA	Isle of Wight County	✓	✓		✓	✓	✓	✓		✓	✓			
VA	Manassas, City of	✓	✓			✓	✓	✓		✓	✓			
VA	Norfolk, City of	✓	✓	✓		✓	✓	✓		✓	✓			
VA	Rockingham, County of					✓					✓			
VA	Virginia Municipal Electric Assoc.					✓	✓	✓					✓	
VA	WateReuse Foundation Research	✓	✓				✓	✓		✓	✓			

Project Team

Our management and supervision of the project team is very simple: staff every position with experienced, capable personnel in sufficient numbers to deliver a superior product to the City of Belle Isle, on time and on budget. With that philosophy in mind, we have selected experienced professionals from Willdan Financial Services and Inwood Consulting Engineers for this engagement. We are confident that our team possesses the depth of experience that will successfully fulfill the desired work performance, as well as address the tasks listed within RFP Section 2, Scope of Services.

Organizational Chart



Resumes

Resumes for each proposed team member have been provided on the following pages.

Jeffrey J. McGarvey, Managing Principal

Principal-in-Charge & Quality Assurance/Quality Control

Mr. McGarvey is a Managing Principal and Vice President in Willdan's Financial Consulting Services group and resides in the Firm's Orlando, Florida office. For more than 31 years, he has provided professional consulting services to municipal water, wastewater, solid waste, and electric utilities throughout the country.

He possesses a broad range of experience, including special expertise in complex alternatives analyses; utility rate analyses; utility valuations and acquisitions; regionalization and consolidation studies; debt issuance support; capital financing analyses; strategic planning; rate and regulatory assistance; and instituting financial mechanisms to provide for the sufficient recovery of operating and capital costs.

Rate & Cost-of-Service Studies – Mr. McGarvey has extensive experience in utility rates and cost-of-service studies, having prosecuted more than 150 throughout the country. Such experience generally relates to performing budget analyses, customer and usage analyses, development of revenue requirements, cost of service allocations and sensitivity analyses related to the implementation of rate structures designed to promote desired usage characteristics. It should also be noted that Mr. McGarvey has prosecuted over 40 system development fee studies throughout the course of his career.

Revenue Bonds, Feasibility Analyses and Capital Funding – Mr. McGarvey has been involved in the preparation of capital financing plans and financial feasibility studies associated with the issuance of over \$1 billion in municipal revenue bonds. The funding proceeds have been utilized for such purposes as utility acquisitions, expansion of facilities and various other capital improvement needs.

In addition, he has developed capital funding strategies utilizing various combinations of bonds, bank loans, government assistance loans (i.e., State Revolving Funds) and grants. He has also made numerous presentations on behalf of clients to various bond insurers and rating agencies (Moody's, Standard & Poor's, and Fitch).

Business and Strategic Planning – Mr. McGarvey has experience in developing complex financial and economic evaluation models for water, wastewater, solid waste, and electric utility systems located throughout the country. Such experience generally relates to the development of business and strategic plans as well as performing structured alternatives analyses and sensitivity analyses related to the evaluation and implementation of system modifications such as service and operational changes as well as planning for customer growth and capital expenditures.

31 Years of Experience

Areas of Expertise

- *Rate & Cost-of-Service Studies*
- *Rate Design*
- *Dynamic Computer Modeling*
- *System Development Fee Studies*
- *Revenue Bonds*
- *Capital & Financial Planning*
- *Acquisitions & Mergers*
- *Utility Valuations*
- *Long Term Strategic Planning*

Presentations

"Wall Street's Perception of North Carolina Water and Sewer Utilities: Positioning for Success," presented at the North Carolina AWWA-WEA Annual Conference

"Renewal and Replacement Costs: How Much is Enough?" presented at the AWWA/WEF Utility Management Conference

Education

BSBA - University of Central Florida

Tara L. Hollis, CPA, CVA, MBA

Project Manager

Ms. Hollis is a Principal Consultant with Willdan Financial Services and has more than 23 years of experience. She is based in the firm's Orlando, Florida office and has provided consulting services throughout the southeast and across the country. Ms. Hollis has provided utility rate, financial, economic, and capital planning services for water, wastewater, stormwater, reclaimed water, solid waste, and electric utility systems. She specializes in rate and cost-of-service studies, capital planning, feasibility and financial reports, debt structuring analyses for the issuance of utility indebtedness, and valuation studies for mergers or acquisitions.

Establishment of Stormwater Utility Rates – Ms. Hollis has been involved in numerous stormwater utility projects and her experience encompasses the following: development of policies and goals; evaluation of alternative rate structures; review and evaluation of billing and collection alternatives; public information programs; preparation of preliminary budgets; detailed cost-of-service analysis and rate design; billing integration; grant and cost share project funding; and development of ordinances and rate schedules.

Rate & Cost-of-Service Studies – Ms. Hollis has extensive experience specific to utility rate and cost-of-service studies, having prosecuted more than 140 studies. Such experience generally relates to performing budget analyses, customer and usage analyses, development of revenue requirements, cost-of-service allocations and sensitivity analyses related to the implementation of rate structures designed to promote desired usage characteristics. It should also be noted that Ms. Hollis has prosecuted over 35 system development fee studies throughout the course of her career.

Revenue Bonds, Feasibility Analyses and Capital Funding – Ms. Hollis has been involved in the preparation of Bond Resolutions, Official Statement Financial Feasibility Reports, Certificates of Compliance, Additional Bonds Test certificates, and other related documents in support of \$1.5 billion of long-term indebtedness. The funding proceeds have been utilized for such purposes as utility acquisitions, expansion of facilities and various other capital improvement needs. In addition, she has developed capital funding strategies utilizing various combinations of bonds, bank loans, government assistance loans (i.e. State Revolving Funds) and grants. She also has extensive experience related to reviewing and analyzing compliance with bond covenant requirements and contractual obligations.

Utility System Valuations – Ms. Hollis has conducted over 200 valuation studies using various techniques including the cost approach, income approach, and comparable sales approach for water, wastewater, and electric utility systems. She has developed detailed financial forecasts and cash flow models to be used in utility acquisition assistance including contract negotiations, transitional, transactional, and financial feasibility analysis. Additionally, Ms. Hollis is a Certified Valuation Analyst, designated from the National Association of Certified Valuators and Analysts.

23 Years of Experience

Certifications

C.P.A. Florida, No. AC-0031100

Certified Valuation Analyst

Areas of Expertise

- *Rate Studies*
- *Revenue Bonds*
- *Assessment Programs*
- *Capital & Financial Planning*
- *System Development Fee Studies*
- *Acquisitions & Mergers*
- *Utility Valuations*
- *Expert Witness Testimony*
- *Utility Optimization Services*

Presentations

“Long Term Capital & Financial Planning for Public Utility Systems,”
EUCI Training Course

“Financial Forces Impacting Utility Systems,” presented at the Growth and Infrastructure Consortium Conference in Florida

“Financial Sustainability as a Basis for Utility Management” presented at the South Carolina Rural Water Association Conference

“Financial Forces Impacting Small Utility Systems” presented at the AWWA Section Conference in Indiana

Education

MBA - University of Central Florida

BSBA - University of Central Florida

Daryll B. Parker, MBA

Project Lead Consultant

Mr. Parker is a Principal Consultant with Willdan Financial Services and has more than 28 years of water and wastewater utility rate, financial, economic, and capital planning experience. He resides in the firm's Orlando, Florida office and his expertise includes rate and cost-of-service studies, wholesale rates, system development fee studies, capital planning, debt issuance support, and regionalization studies.

Rate & Cost-of-Service Studies – Mr. Parker has extensive experience in water and wastewater rate and cost-of-service studies, having prosecuted more than 175 studies. Such studies generally require the development of revenue requirements, performing budget analyses, customer and usage analyses, cost-of-service allocations, financing plan for the capital improvement program, development of user rates to meet client goals and objectives, and the development of a dynamic “dashboard driven” model. It should be noted that Mr. Parker has prosecuted over 80 system development fee studies throughout the course of his career.

Management Consulting – Mr. Parker has been involved with many different facets of management consulting for water and wastewater utility systems including strategic planning, assisting with rate and regulatory matters, analyzing capital funding alternatives and instituting financial mechanisms to provide for sufficient and equitable recovery of operating and capital costs.

Dynamic “Dashboard Driven” Modeling – Mr. Parker has extensive experience developing “custom” Excel rate models that are user friendly, apply easy navigational aids and include a dynamic dashboard tool that supports unlimited “what-if” analyses. Separate dashboard functionality can be developed for each utility system, as well as for the combined enterprise system. The dashboard tool is especially useful in explaining rate options to elected officials, utility advisory boards and members of the public. In addition, the dashboard has interactive graphics, the ability to produce a series of reports as inputs are changed, and the ability to produce financial measures and ratios. It also includes the ability to show alternative pricing structures (uniform versus tiered rates), scenarios/sensitivity analysis post-study, and fiscal budget submissions including rate proposals.

Revenue Bonds, Feasibility Analyses and Capital Funding – Mr. Parker has been involved in the preparation of Financial Feasibility Reports (for inclusion in the Official Statement offering document) in support of more than \$1 billion of long-term indebtedness. He has also made presentations to local government commissions, rating agencies and bond insurers (i.e. Moody's, Standard & Poor's, Fitch, Ambac, FSA, etc.).

28 Years of Experience

Areas of Expertise

- *Rate & Cost-of-Service Studies*
- *Rate Design*
- *Dynamic Computer Modeling*
- *System Development Fee Studies*
- *Revenue Bond Feasibility Reports*
- *Capital & Financial Planning*
- *Acquisitions & Mergers*
- *Valuation Studies*

Presentations/Training

“Long Term Capital & Financial Planning for Public Utility Systems,”
EUCI Training Course

“System Development Fees Case Study,” presented at the North Carolina Government Finance Officers Association Conference

“Utility Rate Studies & Rate Surveys,” presented at the South Carolina Utility Billing Association Annual Meeting

“Getting Ready for Wall Street,” presented at the South Carolina Environmental Conference

“The Reclaimed Water Pricing Paradox,” presented at the North Carolina AWWA/WEA Water Reuse Seminar

Education

MBA - University of Florida

BSBA - University of Florida

Tiffany Rosario

Analytical Support

Ms. Rosario is an analyst within Willdan's Financial Consulting Services group and resides in the firm's Orlando, Florida office. Her focal purpose is to assist principal consultants with utility rate and user fee studies, assessments/non-ad valorem studies, and other financial analyses. She is proficient with Microsoft Excel and has implemented vigorous analyses for a diversity of entities, including cities, counties, public service districts and investor-owned utilities.

Ms. Rosario has conducted an eclectic assortment of financial engagements, including credit default swaps (COVID-19 Pandemic, Sovereign Debt Crisis), mutual funds and hedge fund performance and style evaluations, investment strategies, leveraged portfolios, efficient frontier of optimal portfolios, Monte Carlo simulations, constrained optimization, strategic analysis and recommendations, commercial banks ratio, liabilities/deposits, lending portfolio, non-interest income/expense, risk management, financing, and valuation analyses. Delineated below is Ms. Rosario's pertinent project experience.

Utility Rate Study Experience

- City of Dunn, NC (stormwater)
- City of Clemson, NC (stormwater)
- City of Elon, NC (water and sewer)
- City of Woodruff, SC (sewer)
- Town of Mount Pleasant, SC (stormwater)
- City of Atwater, CA (sanitation)
- West Harris County Regional Water Authority, TX (water)
- City of Brentwood, TN (water and sewer)

Impact/Capacity Fee Studies

- Town of Lake Hamilton, FL (police, transportation, parks, municipal facilities)
- City of Gastonia, NC (water and sewer system development fee)
- City of Woodruff, SC (sewer system development fee)

Assessments

- City of North Port, FL (roads and drainage)
- City of Oviedo, FL (streetlights)
- City of Oviedo, FL (fire)

Other Financial Analyses

- North Peninsula Utility Corporation Ormond Beach, FL (annual report)
- Tymber Creek Utilities, FL (annual report)
- Coastal Utility Management, LA (revenue bond feasibility)
- Rockett Special Utility District, TX (amended CCN valuation)

2 Years of Experience

Areas of Expertise

- *Utility Rate Studies*
- *Impact/Capacity Fee Studies*
- *User Fee Studies*
- *Utility Valuations*
- *Revenue Bonds*
- *Assessment Programs*
- *Financing and Valuation Analysis*
- *Risk Management*

Education

BSBA - University of Central Florida

Steve Sommerfeldt, PE

STORMWATER – PROJECT MANAGER

Steve Sommerfeldt, PE, has served as Project Manager and Project Engineer on various stormwater and water resource projects for municipal government clients throughout Florida since 2001. Mr. Sommerfeldt's key expertise includes stormwater retrofits and master planning efforts, including drainage infrastructure inventory and evaluation, hydrologic/hydraulic modeling, floodplain analysis, construction plans preparation, and construction oversight. He has extensive experience with stormwater modeling, GIS, and CADD design production.

RELEVANT EXPERIENCE

Joint-Use Ponds Assessment, (Orange County) – Project Manager responsible for project management, subconsultant coordination, data collection, engineering and economic analysis, figure preparation, reporting, and client coordination. The Orange County Public Works Roads and Drainage Division has a comprehensive asset inventory program for the County-owned and maintained stormwater ponds. Part of the inventory program includes evaluating properties that contribute runoff to Orange County maintained ponds. The County contracted with Inwood to scientifically assess stormwater management fees for the service offered by each identified stormwater pond within the County. The project involved evaluating existing GIS layers for the County to develop the runoff characteristics for each pond site. ArcGIS tools were used to calculate the weighted runoff curve numbers based on existing land use and soil characteristics. The runoff characteristics were then exported out of ArcGIS and imported into a hydrologic model (ICPR v3.1) to calculate the total volume of stormwater runoff contributing to each pond site. Detailed graphics for each pond site and contributing area were developed within ArcGIS and exported to a Portable Document Format (PDF) and assimilated into a project report. As prime consultant for this project, Inwood was responsible for GIS data collection, management and processing, hydrologic modeling, graphics preparation and report writing.

Boggy Creek Basin HydroNetwork, (Orange County) – Assistant Project Manager responsible for overseeing subconsultant efforts and quality assurance and quality control. This project included data collection, desktop review and field reconnaissance to map drainage infrastructure in portions of the Boggy Creek Watershed. Over 1,847 documents from SJRWMD, SFWMD, FDOT and Orange County were collected and reviewed. Drainage infrastructure (over 33,000 features) were digitized into GIS geodatabase (SFWMD GWIS schema) and source documents were hyperlinked to create an interactive dataset. Documents were carefully organized and information including document source, age, data content, and data quality were recorded to facilitate planning and identification of infrastructure survey needs.

Boggy Creek Basin Survey - Priority Areas 1/3/4/5/7, (Orange County) – Assistant Project Manager responsible for overseeing subconsultant efforts and quality assurance and quality control. The Boggy Creek Basin Survey project consisted of performing field reconnaissance, inventory and coordinate topographic surveying efforts for drainage infrastructure in priority areas within the Boggy Creek Basin that had not been previously visited and verified in the field as part of another study effort or event. As the prime consultant for this project, Inwood was responsible for field reconnaissance and inventory to review and refine areas for which data was not available to previously delineate a HydroNetwork for drainage infrastructure, coordinating subconsultant survey efforts, providing QA/QC review of collected topographic survey features, and preparation of a summary memorandum and geodatabases of the inventory GWIS and additional survey needs.

Boggy Creek Basin Hydraulic Feature Inventory - Priority Areas 2,6,8A,8B,11,12A,12B & 14, (Orange County) – Assistant Project Manager responsible for overseeing subconsultant efforts and quality assurance and quality control. As the prime consultant for this project, Inwood's responsibilities include mapping features sufficiently to determine drainage patterns, system connections, and identify additional survey needs. This effort will focus on identifying control structures, cross-drains, and drainage connections. The area of focus for this effort includes watershed priority areas 2, 6, 8A, 8B, 11, 12A, 12B, and 14 in the Boggy Creek Basin.



Steve Sommerfeldt, PE, CFM



EDUCATION

- Bachelor of Science, Civil Engineering University of Central Florida, 2001

REGISTRATION

- Professional Engineer, FL, 2006, No. 64074

CERTIFICATIONS

- Certified Floodplain Manager, FL, 2012, No. US-12-06219
- Qualified Stormwater Management Inspector, FL, 2009, No. 22365

AFFILIATIONS

- American Society of Civil Engineers, 383467

YEARS EXPERIENCE – 21

YEARS WITH FIRM – 21

Joshua Spence, PE, CFM

STORMWATER – SENIOR ENGINEER

Joshua Spence, PE, CFM, has provided stormwater and water resources services for municipal government clients throughout Florida since 2006. His key areas of expertise include stormwater analysis, watershed management planning, floodplain analysis, drainage infrastructure inventory, stormwater retrofit design, water quality design, and the use of GIS for thematic mapping, geodatabase development, and spatial analysis. Mr. Spence has extensive experience in hydrologic and hydraulic modeling in support of stormwater retrofit and watershed analysis.

RELEVANT EXPERIENCE

Boggy Creek Basin Model Migration and Desktop Verification (Orange County) – Project Engineer responsible for GIS data development, hydrologic and hydraulic modeling, survey needs identification, and report preparation. This project included converting the existing Boggy Creek Basin Stormwater Master Plan model to a GIS geodatabase that allowed interoperability between GIS and ICPR. This project included GIS database preparation, hydrological and hydraulic modeling, topographic data review, survey needs identification, and model update prioritization.

Boggy Creek Basin Survey, Orange County (Orange County) – Senior Project Engineer responsible for coordinating and reviewing field inventory, infrastructure mapping (GWIS geodatabase), and project reporting. The Boggy Creek Basin Survey project consisted of field reconnaissance, inventory, and topographic surveying efforts for drainage infrastructure within the Boggy Creek Basin. As the prime consultant for this project, Inwood was responsible for establishing drainage patterns, preliminary field reconnaissance to locate suspected drainage features, compiling drainage features in GIS, establishing survey needs, and coordinating subconsultant survey efforts.

Boggy Creek Basin HydroNetwork, (Orange County) – Senior Project Engineer responsible for the data collection and review, oversight of infrastructure mapping and database development (GWIS geodatabase), and report preparation. This project involved data collection, desktop review, and field reconnaissance to map drainage infrastructure within the Boggy Creek Watershed. Across two phases, Inwood collected and reviewed over 4,300 documents from SJRWMD, SFWMD, FDOT, and Orange County, as well as stormwater inventory data from the Cities of Orlando and Belle Isle. Drainage infrastructure (over 70,000 features) was digitized into GIS geodatabase, and source documents were hyperlinked to create an interactive dataset. Documents were carefully organized, and information, including document source, age, data content, and data quality, were recorded to facilitate planning and identification of infrastructure survey needs.

Boggy Creek Basin Model Update for Priority Areas 1, 3, 4, 7 and 14 (Orange County) – Assistant Project Manager responsible for coordinating project team, technical oversight GIS and model feature development, and project QA/QC. Inwood was tasked with updating the Boggy Creek Stormwater Master Plan for the northern part of the Boggy Creek Basin, including the City of Belle Isle. This project included adding subbasins, nodes, and model links to increase model detail and parameterizing hydraulic features such as pipes, weirs, and drop structures. Model features were delineated using semi-automated GIS processes and a LiDAR digital elevation model (DEM).

Swann Lake Pump Station Study, (Orange County) – Assistant Project Manager and Project Engineer responsible for data collection, GIS data development and spatial analysis, hydrologic and hydraulic model development, floodplain delineation, engineering analysis, and report preparation. The goal of this project was to perform a study of the Swann Lake watershed area and stormwater pump station to develop a comprehensive drainage and flood level of service evaluation, including floodplain delineation, stormwater pump station evaluation, and BMP alternatives analysis.



Joshua Spence, PE, CFM



EDUCATION

- Master of Science, Civil Engineering, University of Central Florida, 2006
- Bachelor of Science, Civil Engineering, University of Central Florida, 2004

REGISTRATION

- Professional Engineer, FL, 2010, No. 70707

CERTIFICATIONS

- Qualified Stormwater Management Inspector, Florida, 2009, 22366
- Certified Floodplain Manager, Florida, 2009, US-09-04432

YEARS EXPERIENCE – 17

YEARS WITH FIRM – 17

Tyler Pierce, PE

STORMWATER – PROJECT ENGINEER

Tyler Pierce, PE, has provided modeling, GIS analysis, and design services on numerous stormwater and watershed projects throughout Florida. Mr. Pierce's experience includes hydrologic and hydraulic modeling of natural and manmade systems, evaluation of hydraulic networks, level of service analysis, floodplain mapping and analysis, stormwater retrofit and water quality design, permitting services, and construction oversight services. He is skilled in utilizing software including ArcGIS, MicroStation, Interconnected Channel and Pond Routing (ICPR), and BMP Trains.

RELEVANT EXPERIENCE

Joint-Use Ponds Assessment, (Orange County) – Engineering Intern responsible for assisting with hydrology evaluations to determine the appropriate assessment fee for ponds. The Orange County Public Works Roads and Drainage Division has a comprehensive asset inventory program for the County-owned and maintained stormwater ponds. Part of the inventory program includes evaluating properties that contribute runoff to Orange County maintained ponds. The project involved evaluating existing GIS layers for the County to develop the runoff characteristics for each pond site. ArcGIS tools were used to calculate the weighted runoff curve numbers based on existing land use and soil characteristics. The runoff characteristics were then imported into a hydrologic model (ICPR) to calculate the total volume of stormwater runoff contributing to each pond site. Detailed graphics for each pond site were developed and assimilated into a project report. As prime consultant for this project, Inwood was responsible for GIS data collection, management and processing, hydrologic modeling, graphics preparation and report writing.

Boggy Creek Basin HydroNetwork, (Orange County) – Engineering Intern responsible for assisting in mapping drainage infrastructure, HydroNetwork development, and exhibit/report preparation. This project involved data collection, desktop review, and field reconnaissance to map drainage infrastructure within the Boggy Creek Watershed. Across two phases, Inwood collected and reviewed over 4,300 documents from SJRWMD, SFWMD, FDOT, and Orange County, as well as stormwater inventory data from the Cities of Orlando and Belle Isle. Drainage infrastructure (over 70,000 features) was digitized into GIS geodatabase, and source documents were hyperlinked to create an interactive dataset. Documents were carefully organized, and information, including document source, age, data content, and data quality, were recorded to facilitate planning and identification of infrastructure survey needs.

Boggy Creek Basin Hydraulic Feature Inventory, (Orange County) – Project Engineer responsible for performing field reconnaissance, developing a HydroNetwork for inventoried features, assisting in the QA/QC of topographic survey features, and assisting with the development of technical memorandum summarizing the project efforts. Field reconnaissance was performed to resolve catchment boundaries, verify drainage patterns, and inventory stormwater infrastructure. A HydroNetwork was created in a Geographic Watershed Information System (GWIS) geodatabase for the features identified during the inventory. Features deemed significant were provided to the surveyor (subconsultant) and subsequently surveyed. Inwood then reviewed the survey deliverables for QA/QC.

Boggy Creek Basin Model Updates, (Orange County) – Project Engineer responsible for the development and parameterization of a Geographic Watershed Information System (GWIS) geodatabase for the Boggy Creek Basin. Inwood was tasked with updating the Boggy Creek Stormwater Master Plan for the northern part of the Boggy Creek Basin, including the City of Belle Isle. This project included adding subbasins, nodes, and model links to increase model detail and parameterizing hydraulic features such as pipes, weirs, and drop structures. Model features were delineated using semi-automated GIS processes and a LiDAR digital elevation model (DEM). Field reconnaissance was performed to resolve catchment boundaries, verify drainage patterns, and inventory stormwater infrastructure. After the model network was created, select model features were parameterized within the HEP Network of the GWIS geodatabase. Lastly, a technical memorandum summarizing the development and parameterization of the model was completed.



Tyler Pierce, PE, CFM



EDUCATION

- Master of Science, Water Resources, University of Central Florida, 2013
- Bachelor of Science, Civil Engineering, University of Central Florida, 2012
- Bachelor of Science, Environmental Engineering, University of Central Florida, 2012

REGISTRATION

- Professional Engineer, FL, 2019, No. 86591

CERTIFICATIONS

- ASFPM Certified Floodplain Manager, FL, 2017, No. US-17-09700
- Qualified Stormwater Management Inspector, FL, 2014, No. 30260

YEARS EXPERIENCE – 9

YEARS WITH FIRM – 9

Madeline McIntosh, EI

STORMWATER - ENGINEERING INTERN

Madeline McIntosh, EI, has served as an engineering intern on stormwater projects for Orange County. She has experience with stormwater modeling and analysis at the watershed scale. Ms. McIntosh is a member of the American Society of Civil Engineers (ASCE) and is skilled in the use of ArcGIS, WEPP, Matlab, and Microsoft Office Suite.

RELEVANT EXPERIENCE

Boggy Creek Basin Model Update - Priority Areas 5, 8B, 10, & 11, (Orange County) – Engineering Intern responsible for using Environmental Resource Permits, Orange County Inventory, and Google Street View to locate and map infrastructure in GIS. Assisted in the development of catchments through the use of ArcHydro tools. Identified model features within the watershed and ran connectivity on model features to develop links. Identified areas where the DEM had changed and used mosaic tools to update out of date areas. Prepared field recon maps. Attended a field visit to locate infrastructure that could not be found in plans. Used survey data to create hydraulic element points and related sub-element tables.

Boggy Creek Basin Hydraulic Feature Inventory - Priority Areas 2, 6, 8A, 8B, 11, 12A, 12B & 14, (Orange County) – Engineering Intern responsible for reviewing data collected through survey. As the prime consultant for this project, Inwood's responsibilities include mapping features sufficiently to determine drainage patterns, system connections, and identify additional survey needs. This effort will focus on identifying control structures, cross-drains, and drainage connections. The area of focus for this effort includes watershed priority areas 2, 6, 8A, 8B, 11, 12A, 12B, and 14 in the Boggy Creek Basin.

B-14 Boggy Creek Pipeline Segment C- Construction Observation, (Orange County) – Engineering Intern responsible for attending site visits to track and monitor and document construction progress through field reports. Assisted in the creation of figures.

Lake Hart Watershed Management Plan, (Orange County) – Engineering Intern responsible for digitizing impervious area and classifying as directly connected, or non-directly connected. Inwood was tasked with completing the development of the updated existing conditions model for Lake Hart Basin. This effort included completing model parameterization, executing model simulations for design storm events, and floodplain delineation using the result of the updated existing conditions model.

Lake Marsha & Shadow Bay Pump Station (PS-70 & PS-71) Study Engineering, (Orange County) – Engineering Intern responsible for using water atlas data to summarize key statistics related to Lake Marsha, East Lake, and West Lake. Used survey data to establish warning stages and initial stages for nodes. Identified dry ponds where percolation would occur based on soil conditions and set up percolation links with soil data found through the use of Soil Data Explorer's built in ArcGIS tool. Cut overland flow cross sections and parametrized weir links and associated features. Manually drew flow lines and calculated time of concentration for each basin. Ran stage area for basins using ArcHydro tools. Creating field recon maps and attending a site visit. Updating a litany of figures and exhibits for the Watershed Existing Conditions Technical Memo and assisting with minimal writing and table creation for the report.

Old Cheney Highway Drainage Improvements Phase II, (Orange County) – Engineering Intern responsible for updating project quantities, construction duration estimates, and unit costs. Also updated various plan sheets using MicroStation. The project area is near the intersection of Old Cheney Highway and Tanner Road in eastern Orange County. The overall contributing drainage area for the project is 896 acres. The purpose of this project is to provide drainage improvements to existing stormwater pipe replacement and regrading existing swales.



Madeline McIntosh, EI



EDUCATION

- Bachelor of Science, Environmental & Ecological Engineering, Minor Environmental Politics and Policy, Purdue University, 2021

REGISTRATION

- Engineering Intern, FL, 2021, No. 1100024850

YEARS EXPERIENCE – 3

YEARS WITH FIRM – 1

References

We are proud of our reputation for customer service and encourage you to contact these clients regarding our commitment to excellence.

Reference 1			
Organization Name:	City of Oviedo, FL		
Location (Address):	400 Alexandria Boulevard Oviedo, FL 32765		
Contact Name:	Mr. Jerry Boop, Finance Director		
Telephone #:	(407) 971-5544	Date Service Began:	2013
Email:	jboop@cityofoviedo.net	Date Service Ended:	Ongoing
Services Provided:	Water, Wastewater, Reclaimed Water, Sanitation and Stormwater Financial Services including revenue sufficiency analyses, bond feasibility studies, financial planning, rate studies, etc.		
Project Manager:	Mr. Jeff McGarvey and Ms. Tara Hollis, CPA, CVA (Willdan Financial Services)		
Reference 2			
Organization Name:	City of DeLand, FL		
Location (Address):	120 S. Florida Avenue DeLand, FL 32720		
Contact Name:	Ms. Brandi Weaver, Customer Service Manager		
Telephone #:	(386) 626-7051	Date Service Began:	January 2020
Email:	weaverb@deland.org	Date Service Ended:	October 2020
Services Provided:	Stormwater Rate Study – Billing and Collection Methods Analysis		
Project Manager:	Ms. Tara Hollis, CPA, CVA (Willdan Financial Services)		
Reference 3			
Organization Name:	Town of Mount Pleasant, SC		
Location (Address):	100 Ann Edwards Lane Mount Pleasant, SC 29464		
Contact Name:	Ms. Marcy Cotov, Chief Financial Officer		
Telephone #:	(843) 884-8517, ext. 3404	Date Service Began:	November 2020
Email:	MCotov@tompsc.com	Date Service Ended:	Ongoing
Services Provided:	Stormwater Rate Study – Residential Tiered Structure Analysis, Billing and Collection Methods, Annual Fee Roll preparation for Tax Collector		
Project Manager:	Ms. Tara Hollis, CPA, CVA (Willdan Financial Services)		
Reference 4			
Organization Name:	City of Dunn, NC		
Location (Address):	401 E. Broad St. PO Box 1065 Dunn, NC 28335		
Contact Name:	James O. Roberts, Finance Director		
Telephone #:	(910) 230-3515	Date Service Began:	May 2021
Email:	joroberts@dunn-nc.org	Date Service Ended:	May 2022
Services Provided:	Stormwater Rate Study – Develop rate structure modifications and rates based on impervious area, convert billing to the tax bill method versus utility bill method.		
Project Manager:	Ms. Tara Hollis, CPA, CVA (Willdan Financial Services)		

Reference 5			
Organization Name:	City of Lexington, NC		
Location (Address):	City Hall – 28 West Center Street Lexington, NC 27292		
Contact Name:	Chip Vanderzee, Public Services Director		
Telephone #:	(336) 243-2489 ext. 3337	Date Service Began:	January 2020
Email:	svanderzee@lexingtonnc.gov	Date Service Ended:	January 2021
Services Provided:	Stormwater Rate Study – Develop Initial Rates and Charges and Preliminary Billing Register, Public Education and Outreach Assistance		
Project Manager:	Ms. Tara Hollis, CPA, CVA (Willdan Financial Services)		

Reference 6			
Organization Name:	Orange County Public Works Stormwater Management Division		
Location (Address):	4200 South John Young Parkway Orlando, Florida 32839		
Contact Name:	Ms. Grace Chua Corn		
Telephone #:	(407) 836-7965	Date Service Began:	February 2013
Email:	grace.chuacorn@ocfl.net	Date Service Ended:	September 2020
Services Provided:	Joint Use Ponds Assessment and Boggy Creek Basin HydroNetwork - Stormwater Analysis, Utility Rate Analysis, Reporting, Stakeholder Coordination		
Project Manager:	Mr. Steve Sommerfeldt, PE (Inwood Consulting Engineers, Inc.)		

Reference 7			
Organization Name:	Orange County Public Works Stormwater Management Division		
Location (Address):	4200 South John Young Parkway Orlando, Florida 32839		
Contact Name:	Mr. Daniel Negron, PE, CFM – Chief Engineer		
Telephone #:	(407) 836-7743	Date Service Began:	2021
Email:	Daniel.Negron@ocfl.net	Date Service Ended:	Ongoing
Services Provided:	Continuing Services Agreement - Stormwater management analysis, engineering assessments, hydrologic and hydraulic modeling, pollutant load modeling, improvement studies, watershed management plans, erosion control, cost estimating, final design and post-design services, review and development of guidelines and specifications, utility rate analysis, strategic planning, public involvement, stakeholder coordination, and long-range planning		
Project Manager:	Mr. Steve Sommerfeldt, PE (Inwood Consulting Engineers, Inc.)		

Tab 6 – Pricing and Payment Terms

The fees charged by the Willdan Team are reflective of our belief in, and commitment to, providing high quality, cost-effective consulting services to our clients. As such, we have adopted a billing philosophy whereby out-of-pocket costs such as reproduction, printing, postage, shipping, telephone, and travel are considered as part of the project and included in the proposed fees set forth herein. This is accomplished by utilizing a fixed fee approach based on a defined scope of services, and not requesting change orders or budget amendments unless additional services are requested by the client.

We propose a **fixed fee of \$49,368 for the Scope of Services**, as proposed herein and detailed below. The proposed fixed fee amount includes all anticipated project costs with no additional charges for travel, administration, printing/copying, courier services, etc. This price reflects the City’s request to evaluate multiple rate structures, each requiring the development of a unique data set. The proposed fixed fee assumes that parcel data, including parcel characteristic data, is available and will be provided by the City. However, this fee may be increased or decreased depending on the finalization of the scope, availability and quality of data, and the number of meetings. The current budget assumes six (6) on-site meetings/presentations: one project kick-off, one to discuss study results and methodology, one to discuss the draft rate study report, one presentation to the City Council at a workshop, and participation in two (2) Council Meetings.

Shown within the following table is the itemization of all labor hours, professional fees, and expenses.

Phase	Task	Description	Hours	Amount
1		Project Initiation		
	1.1	Kick-Off Meeting	14	2,196
	1.2	Data Acquisition	18	2,263
	1.3	Data Review	12	1,515
2		Revenue Requirements and Customer Data		
	2.1	Develop Net Revenue Requirements to be Recovered from Rate	34	5,674
	2.2	Projected Billing Determinants	44	6,753
3		Development of User Rates and Charges		
	3.1	Cost of Service Allocations	20	3,075
	3.2	Design User Rates	32	5,430
	3.3	Mitigation Credit Policy Review	10	1,845
	3.4	Rate Comparisons with Other Utilities	16	2,320
	3.5	Projected Operating Results	16	2,320
4		Preliminary/Final Reports, Meetings & Presentations		
	4.1	Prepare Draft Report	22	4,000
	4.2	Prepare and Deliver Final Report	12	2,220
	4.3	Prepare Draft Rate Ordinance	8	1,380
	4.4	Rate Model Dashboard	10	1,600
	4.5	Staff Meetings	16	3,314
	4.6	Presentations and Public Meetings	16	3,464
Total Fixed Fee Amount			300	\$ 49,368

Notes

- The client will be invoiced on a monthly percentage-completion basis.
- Invoices will include a description of services, as well as a summary of costs to date by task.
- We will perform additional tasks, outside our scope of services, as requested and authorized by the client for an additional fee.
- Willdan will rely on the validity and accuracy of the client’s data and documentation to complete our analyses. Willdan will rely on the data as being accurate without performing an independent verification of accuracy, and we will not be responsible for any errors that result from inaccurate data provided by the client or a third party.
- The client shall reimburse Willdan for any costs Willdan incurs, including without limitation, copying costs, digitizing costs, travel expenses, employee time, and attorneys' fees, to respond to the legal process of any governmental agency relating to the client or relating to this project. Reimbursement shall be at Willdan's rates in effect at the time of such response.

Additional Services and Hourly Rate Schedule

Additional services may be authorized by the client and will be billed at our then-current hourly overhead consulting rates. Current hourly rates for each firm are listed in the tables below.

Willdan Financial Services Hourly Rate Schedule		
Position	Team Member	Hourly Rate
Managing Principal	Jeffrey McGarvey	\$220.00
Principal Consultant	Tara Hollis & Daryll Parker	\$200.00
Senior Project Manager		\$180.00
Project Manager		\$160.00
Senior Analyst		\$125.00
Analyst	Tiffany Rosario	\$90.00
Project Support		\$75.00

Inwood Consulting Engineers Hourly Rate Schedule		
Position	Team Member	Hourly Rate
Principal-In-Charge		\$299.20
Project Manager	Steve Sommerfeldt	\$244.80
Senior Engineer	Joshua Spence	\$214.20
Project Engineer		\$178.50
Engineer	Tyler Pierce	\$163.20
Engineering Intern	Madeline McIntosh	\$124.53
Senior Engineering Technician		\$109.65
Secretary/Clerical		\$73.53
Technician		\$68.00

Attachments

Attachment A – Non-Discrimination Affidavit

Update Rate Study for Stormwater RFP # 23-01

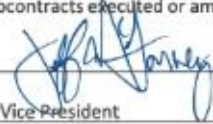
ATTACHMENT A

NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization or business entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Belle Isle. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

It is the policy of the City of Belle Isle that Minority/Women - Owned Business Enterprises (MWBE) shall have the maximum opportunity to participate in all contracts. The City of Belle Isle will accept MWBE certifications from Orange County and any State of Florida certification.

Further, City Purchasing Police Section 1.8 requires that all contracting agencies of the City, or any department thereof, acting for or on behalf of the City, shall include in all contracts and property contracts hereinafter executed or amended in any manner or as to any portion thereof, a provision obligating the contractor not to unlawfully discriminate (as proscribed by federal, state, county, or other local law) on the basis of the fact or perception of a person's race, color, creed, religion, national origin, ancestry, sexual orientation, gender identity or expression, marital status, pregnancy, familial status, veterans status, political affiliation, or physical or mental disability and such person's association with members of classes protected under this chapter or in retaliation for or opposition to any practices forbidden under this chapter against any employee of, any City employee working with, or applicant for employment with such contractor and shall require such contractor to include a similar provision in all subcontracts executed or amended there under.

By: 
Title: Vice President

STATE OF FLORIDA
COUNTY OF Orange

Sworn to and subscribed before me this 14 day of December, 2022, by Jeff McGarvey.

Signature of Notary Public

Personally known, or
 Produced Identification

Type of ID Produced



Attachment B - Non-Debarment Affidavit

Update Rate Study for Stormwater RFP # 23-01

ATTACHMENT B

Page 1 of 2

NON-DEBARMENT AFFIDAVIT

Jeff McGarvey Being first duly sworn, deposes and says that:

He/She is Vice President of Willdan Financial Services the Proposer ("Respondent") that has submitted the attached Proposal. By offering a submission to this RFP, the Respondent certifies and affirms that to the best of his/her knowledge and belief, that:

1. The Respondent is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any transaction of any Federal, state or local agency; and
2. The Respondent has not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records; making false statements; or receiving stolen property; and
3. The Respondent is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph 2 of this affidavit; and
4. The Respondent has not within a three-year period preceding this proposal had one or more public transactions (Federal, State or local) terminated for cause or default; and
5. The Respondent will submit a revised Debarment Affidavit immediately if the status changes.


If the Respondent cannot certify that he/she is not debarred, he/she shall provide an explanation with this submittal. An explanation will not necessarily result in denial of participation in a contract. Failure to submit a debarment affidavit will disqualify the contractor from the award of any contract.

Check here if an explanation is attached to this affidavit.



Update Rate Study for Stormwater RFP # 23-01

Page 2 of 2

By: 
 Print Name: Jeff McGarvey
 Title: Vice President
 Date: 12/14/2022

STATE OF FLORIDA)
COUNTY OF Orange)

The foregoing Agreement was acknowledged before me this 14 day of December, 2022, by Jeff McGarvey, who has affirmed that he/she has been duly authorized to execute the above document. He/she is personally known to me or has produced N/A as identification.

NOTARY'S SEAL:

 NOTARY PUBLIC, STATE OF FLORIDA

 Tiffany Rosario
 Name of Acknowledger, typed, printed, or Stamped



Attachment C - Drug-Free Workplace Certification

Update Rate Study for Stormwater RFP # 23-01

ATTACHMENT C

DRUG-FREE WORKPLACE CERTIFICATION

Preference must be given to vendors submitting a certification with their bid/proposal certifying they have a drug-free workplace in accordance with Section 287.087, Florida Statutes. This requirement affects all public entities of the State and becomes effective January 1, 1991. The special condition is as follows:

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids which are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program, a business shall:

- 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 specifying the actions that will be taken against employees for violations of such prohibition.
- 2) Inform employees about the dangers of drug abuse in the workplace, the business's 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 for 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 employee 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 893 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 so 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 complies fully with the above requirements.

Willdan Financial Services

COMPANY NAME


VENDOR'S SIGNATURE

Must be executed and returned with attached proposal to be considered.

Attachment D - Non-Collusive Affidavit

Update Rate Study for Stormwater RFP # 23-01

ATTACHMENT D

NON-COLLUSIVE AFFIDAVIT

State of Florida)

County of Orange)

Jeff McGarvey being first duly sworn deposes and says that:

(1) He/she is the Officer (Owner, Partner, Officer, Representative or Agent) of Willdan Financial Services the Proposer that has submitted the attached Proposal;

(2) He/she is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;

(3) Such Proposal is genuine and is not a collusive or sham Proposal;

(4) Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any Proposer, firm, or person to fix the price or prices in the attached proposal or of any other Proposer, or to fix any overhead, profit, or cost elements of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;

(5) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Proposer or any other of its agents, representatives, owners, employees or parties in interest, including this affiant.

By: [Signature]
Title: Vice President

Company: Willdan Financial Services

STATE OF FLORIDA
COUNTY OF Orange

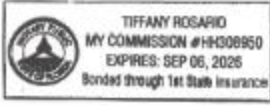
Sworn, to and subscribed before me this 14 day of December, 2022,

by Jeff McGarvey

Signature of Notary Public

Personally known, or
 Produced Identification

Type of ID Produced



Attachment E – Certification Pursuant to Florida Statute 287.135

Update Rate Study for Stormwater RFP # 23-01

ATTACHMENT E

CERTIFICATION PURSUANT TO FLORIDA STATUTE § 287.135

I, Jeff McGarvey, Vice President, on behalf of Willdan Financial Services

Print Name and Title

Company Name

certify that Willdan Financial Services does not:

Company Name

1. Participate in a boycott of Israel; and
2. Is not on the Scrutinized Companies that Boycott Israel List; and
3. Is not on the Scrutinized Companies with Activities in Sudan List; and
4. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; and
5. Has not engaged in business operations in Syria.

Submitting a false certification shall be deemed a material breach of contract. The City shall provide notice, in writing, to the Contractor of the City's determination concerning the false certification. The Contractor shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination of false certification was made in error. If the Contractor does not demonstrate that the City's determination of false certification was made in error then the City shall have the right to terminate the contract and seek civil remedies pursuant to Florida Statute § 287.135.

Section 287.135, Florida Statutes, prohibits the City from: 1) Contracting with companies for goods or services in any amount if at the time of bidding on, submitting a proposal for, or entering into or renewing a contract if the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, F.S. or is engaged in a boycott of Israel; and

2) Contracting with companies, for goods or services over \$1,000,000.00 that are on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473, or are engaged in business operations in Syria.

As the person authorized to sign on behalf of the Contractor, I hereby certify that the company identified above in the section entitled "Contractor Name" does not participate in any boycott of Israel, is not listed on the Scrutinized Companies that Boycott Israel List, is not listed on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, and is not engaged in business operations in Syria. I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract with the City for goods or services may be terminated at the option of the City if the company is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan list or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Willdan Financial Services
 COMPANY NAME
Jeff McGarvey
 PRINT NAME
Vice President
 TITLE


 SIGNATURE

Must be executed and returned with attached proposal to be considered



Willdan Financial Services
200 South Orange Avenue, Suite 1550 | Orlando, FL 32801
Contact: Tara Hollis | P: 407.255.2928 | E: thollis@willdan.com

www.willdan.com



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: January 3, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Registration of Septic Haulers

Background: As directed by the City Council, the staff drafted language to register septic haulers who operate in the City. It is necessary to register septic haulers to make sure they have the proper state licenses and other documentation that allow them to legally operate in the City. It also allows for the City to take some action against the hauler if they do not perform their duties according to their license. It allows haulers to use city streets when hauling septic loads. If there is a spill, the registration provides the City will emergency contact numbers for spill remediation. The City can also provide a list of registered contractors to residents who call and ask who they can (or can't) use.

Staff Recommendation: Discuss the proposed language and provide changes if necessary. If no changes are necessary, direct the staff to prepare the ordinance for a first reading at the next Council meeting.

Suggested Motion: I move that we direct the City staff to finalize the ordinance to register septic haulers and place the Ordinance on the January 17, 2023 Council Agenda for a first reading.

Alternatives: Provide additional guidance to the staff

Fiscal Impact: None

Attachments: Draft Ordinance language and permit

SEC 28-103. Registration of Septage Hauling

A. The City shall establish guidelines for the registration of septage hauling and it shall be unlawful for any person to carry on or engage in the business of cleaning of septic tanks, cesspools, grease traps, seepage pits, vault privies, chemical toilets and other receptacles of human sewage or to transport over the streets in the City of Belle Isle unless they are registered with the City of Belle Isle and hold a license issued by the State of Florida and by Orange County under Orange County code Section 37-739 for carrying on such business.

B. Application for registration and other required license and permits shall be filed with the Office of the City Clerk. At a minimum, besides the required state and county permits and licenses, septic haulers must provide its business name, local business tax receipt number, contact person, address and telephone number.

C. The city keeps a list of businesses that are allowed to operate in the city. This list is to assist in providing residents with a variety of choices for a service or product. Any specific commercial product, process, or service by trade name, trademark, manufacturer, or otherwise, is not an endorsement or recommendation by the city or its employees. Further, the city does not endorse or recommend any commercial products, processes, or services. The city will not recommend one service over another to residents

D. In the event any registered septic hauling service is determined by the city manager or designee to have violated the city's requirements pertaining to septic hauling, that service shall be suspended and removed from the list of registered services with written notice mailed to the service and shall not be authorized to conduct business within the City of Belle Isle for a minimum of one year from the date of the suspension. Any service that has been suspended and removed from the list may make a request in writing to the city clerk for a hearing before city council to appeal the removal.

CITY OF BELLE ISLE

Application For Liquid Waste (Septage) Transportation Permit

- 1. Name of business
- 2. * Physical address of business
- 3. * City State ZIP
- 4. Mailing address of business
- 5. City State ZIP
- 6. Name of owner
- 7. Owner
- 8. Office Manager’s Number/Email
- 9. Tax ID # _____
- 10. Business telephone(s)
- 11. Cell telephone(s)
- 12. Emergency notification telephone(s)
- 13. E-Mail Address
- 14. Indicate below all the types of liquid waste to be transported (check all that apply):
 - Grease Trap Waste Sand/Grit Trap Waste
 - Septic Tank Waste (Septage) Chemical Toilet Waste
- 15. Florida License #: _____ Expiration Date: _____
 Orange County Permit #: _____ Expiration Date: _____

* **NOTE:** P. O. Boxes are not acceptable. Must state street address.

Certification Statement: This application is to be signed by the owner of the business, or officer of a corporation, after adequate completion of this form and review by the person signing below. “I have examined and am familiar with the information submitted in this application. I believe that the

information submitted is true, accurate and complete. I agree to accept and to abide by all applicable ordinances and regulations of the City of Belle Isle.

I understand that falsification of any information submitted shall be cause for termination of the Liquid Waste (Septage) Transport Permit. I acknowledge that this permit authorizes the transport of only those liquid wastes listed above in item 14 and I understand that no hazardous waste or industrial waste is to be transported or mixed with liquid waste hauled under this permit.

Any person willfully or negligently violating PERMIT conditions is subject to a fine of two thousand dollars (\$2,000) for each offense. Each day that a violation is permitted to exist shall constitute a separate offense. Further, the CITY may issue Notice of Violation, conduct show cause hearings, revoke this PERMIT and initiate legal actions to enforce the Ordinance and PERMIT conditions. The CITY may invoice the PERMITTEE for costs incurred for any cleaning, repair, or replacement work caused by a violation or discharge, and in the event PERMITTEE fails to make payment of any such invoice, the CITY may suspend Liquid Waste (Septage) Transport Permit.

I understand that the permit is valid for one year or as specified by the permit itself and must be renewed on an annual basis to maintain a valid permit.”

Signature of Owner/Corporate Officer

Date

Printed Name

Belle Isle Issues Log
1/3/23

b.

Issue	Synopsis	Start Date	Next steps
Traffic Issues/Projects	Increased traffic in and through Belle Isle prompted the Council adopt Traffic Master Plan and work on traffic calming issue.	4/3/2017	City working with MMI for improvements to Judge Road (Gateway Landscaping and restriping). Funds budgeted in FY2022-2023 Budget to hire a consultant to assist in developing traffic plan. City to apply for permit to install in-road lighting at RRFB on Hoffner at Monet. Continue to work on Crosswalk Permit with Orange County. Two volunteers (District 1 and District 5) for Adviosry Committee.
Wallace Field	City purchased large area at Wallace/Matchett for open space. City zoned it for open space. City/CCA have an agreement for development including installing artificial turf, public restrooms, storage, and parking. CCA responsible for development.	2/1/2021	CCA to submit SJWMD Application for Environmental Resource Permit. SJWMD permit was approved. Waiting for CCA Engineer and designer to contact the City with next step. Site Plan is on hold at this time to determine the future use of Wallace Field. CM is requesting Council workshop to review potential sites for new City Facilities (Police/EOC/City Hall). CCA contacted City and would like to start the development process. No Update
City acquisition of Property	Council discussed possibility of acquiring parcels within the City and directed City staff look at options on how to acquire property.	NA	Consultant provided a first draft of the cost of a new combined police/EOC/City Hall facility. CM is requesting Council workshop to review potential sites for new City Facilities (Police/EOC/City Hall). After workshop, Council directed CM to look at selected properties. City cancelled the purchase of 1209 Hoffner (Escrow returned).
Charter School Expansion	With Lease signed, CCA is moving forward with financing. Expect to close on the financing in June. CCA expected to apply for PD zoning.	3/3/2022	Waiting for CCA Refinancing and Zoning application. Agenda item to amend the lease. PD Pre-Application meeting held. Waiting on CCA to schedule Community Meetings and revise site plan in response to pre-application meeting. Community meeting confirmed for January 12 at 5:30 PM at CCA Auditorium. CCA has flyer on their website. City to send out E-Alerts and post flyer to website.

Belle Isle Issues Log

1/3/23

b.

Municipal Code Update	The City Council contracted with a planner to update the municipal code. There are sections of the BIMC that need to be updated. This is an on-going process.	4/3/2017	6 month moratorium on Artificial Turf in effect. Code Enforcement and CM met on suggestions to change the general ordinances. P&Z Meeting Update on Artificial Turf by City Planner. Continue with moratorium, Planner is developing community survey and questionnaire for other local governments on the use of artificial turf. Registration of Septic Haulers
Comp Plan Updates	The comp plan is reviewed every 7 years to see if it needs to be updated. The City Council contracted with a planner to update the comprehensive plan.	3/1/2017	Next plan review and changes are to be done in 2024. Funds budgeted in FY2022-2023 Budget to hire a consultant to assist in developing Comp Plan update. Committee openings advertised. Two applications received (both District 6). Applications due by December 8, 2022. No additional applications received.
Annexation	Council discussed the desire to annex contiguous property in order to build the tax base and possibly provide more commercial development in Belle Isle.	4/3/2017	Sienna Place is now in the City. Staff met with HOA President. CM will continue to contact Brixmor. Welcome Packet distributed and posted. Sienna Place Annexation closed. Brixmor (Publix) Annexation on hold (update in October). Direction from Council needed on next area, if any, to look at annexing. Meeting being set up with Brixmor. Reviewing other areas that might benefit the City. Ongoing
Lake Conway Issues	Residents have complained that Lake Conway is unsafe due to speeding and reckless actions by some vessels. Council would like more local control over the lake.	6/1/2019	Met with FWC Officials and Orange County Personnel on Lake issues. City and County will work toward a joint document for lake issues. County adopted Phase I of a new ordinance on May 24. Belle Isle is Phase II of the process. Presentation made to Nav Board on Sandbar exclusions and kayak trail. City Manager and Police Chief met with citizens to discuss sand bar issues. Suggest Council hold a workshop to further discuss Sand Bar issues and hear comments from public. Update to be given by Chief Houston.
Lancaster House		2/5/2019	CCA voted to request demolition of the Lancaster House. Council denied request for house demolition and directed CM, Comm. Partin, and CA to negotiate new lease terms with CCA. CCA stated they cannot change the terms of the lease while going through financing. No update.
Weed Management	Many residents have complained about the proliferation of weeds in the lake. The weeds are causing damage to vessels and some large "weed mats" are considered Navigational Hazards.	11/1/2022	The City submitted an application to the FWC for a permit to look at mechanical harvesting of the lake weeds. The application was submitted for managing the weeds in the middle and south lobes from shore out to 500 feet. FWC is reviewing the permit and asked for additional information. Permit still being reviewed at FWC. City staff developing RFP for mechanical harvesting if permit is approved. No Update

Belle Isle Issues Log
1/3/23

b.

Airport Noise	Residents have complained that there is excessive noise from the airport since OIA instituted the Metroplex plan of operation. The City has shared their concerns with the Airport Noise Abatement Committee (ANAC); however ANAC has yet to assist the City in resolving this issue.	11/1/2022	The City worked with an aviation consulting group to develop a report to present to the ANAC Committee at the January 13 ANAC meeting. This report outlines the problems and suggests recommendations on how to resolve the issues. City's report will be delivered to ANAC at January Meeting.
Weir Management	Prior to storms, it has been the practice of Orange County Public Works Drainage Division to remove boards from the weir on the south lobe to reduce the water level. During the last two named storms, there has been an issue with this process. Keeping the water level high causes damage to property.	11/1/2022	The City wants to pursue a meeting with all parties involved in the decision-making process on removing boards from the weir. The expected results of the meeting are a clear "chain-of-command" for authorizing the removal (or not) of the boards and a well-defined process for lowering the lake levels. New person at SJRWMD who will be investigating the process and contact the City.