



Town Council Workshop

October 07, 2025 at 2:00 PM

Howey-in the-Hills Town Hall

101 N. Palm Ave.,

Howey-in-the-Hills, FL 34737

Join Zoom Meeting: <https://us06web.zoom.us/j/89099154855?pwd=vPK6ejdaJQb6V7aBUvTkjXgOUIID9qT.1>
Meeting ID: 890 9915 4855 | **Passcode:** 684209

AGENDA

Call the Town Council Meeting to order
Pledge of Allegiance to the Flag
Invocation by Councilor Reneé Lannamañ

ROLL CALL

Acknowledgement of Quorum Present and Proper Notice Given

WELCOME AND INTRODUCTION OF GUESTS

AGENDA APPROVAL/REVIEW

PUBLIC QUESTION & COMMENT

Any person wishing to address the Mayor and Town Council and who is not on the agenda is asked to speak their name and address. Three (3) minutes is allocated per speaker. The general Public Question & Comment period will be limited to a maximum of thirty (30) minutes unless extended by the Presiding Officer.

NEW BUSINESS

- [1.](#) Discussion: **GrayRobinson (RFQ 2025-006 Town Attorney Interview)**
- [2.](#) Discussion: **Town Manager Annual Review**

ADJOURNMENT

To Comply with Title II of the Americans with Disabilities Act (ADA):

Qualified individuals may get assistance through the Florida Relay Service by dialing 7-1-1. Florida Relay is a service provided to residents in the State of Florida who are Deaf, Hard of Hearing, Deaf/Blind, or Speech Disabled that connects them to standard (voice) telephone users. They utilize a wide array of technologies, such as Text Telephone (TTYs) and ASCII, Voice Carry-Over (VCO), Speech to Speech (STS), Relay Conference Captioning (RCC), CapTel, Voice, Hearing Carry-Over (HCO), Video Assisted Speech to Speech (VA-STs) and Enhanced Speech to Speech.

Howey Town Hall is inviting you to a scheduled Zoom meeting.
Topic: **Town Council Workshop**

Time: **Oct 07, 2025 02:00 PM Eastern Time** (US and Canada)

Join Zoom Meeting

<https://us06web.zoom.us/j/89099154855?pwd=vPK6ejdaJQb6V7aBUvTkjXgOUIID9qT.1>

Meeting ID: 890 9915 4855

Passcode: 684209

Please Note: In accordance with F.S. 286.0105: Any person who desires to appeal any decision or recommendation at this meeting will need a record of the proceedings, and that for such purposes may need to ensure that a verbatim record of the proceedings is made, which includes the testimony and evidence upon which the appeal is based. The Town of Howey-in-the-Hills does not prepare or provide this verbatim record. Note: In accordance with the F.S. 286.26: Persons with disabilities needing assistance to participate in any of these proceedings should contact Town Hall, 101 N. Palm Avenue, Howey-in-the-Hills, FL 34737, (352) 324-2290 at least 48 business hours in advance of the meeting.

A. TITLE PAGE

TOWN OF HOWEY-IN-THE-HILLS

Legal Services for Town Council - RFQ 2025-006

September 2, 2:00 pm

PREPARED BY

GRAYROBINSON

Heather M. Ramos

Orlando Managing Shareholder

301 East Pine Street, Suite 1400

Orlando, Florida 32801

407.244.5670

heather.ramos@gray-robinson.com

TABLE OF CONTENTS

A. TITLE PAGE	0
B. LETTER OF TRANSMITTAL	2
C. QUALIFICATIONS	3
Lead Town Attorney: Heather M. Ramos	15
Team Member: Deborah L. La Fleur, B.C.S.	17
Team Member: Thomas J. Wilkes	19
Team Member: Natalie M. Yello, B.C.S.	22
Assistant Town Attorney: Christina Epperson	24
D. FEE PROPOSAL	26
E. OTHER INFORMATION REQUIRED	27
F. FORMS	38
G. ADDITIONAL INFORMATION	44
H. AVAILABILITY	45

B. LETTER OF TRANSMITTAL

This letter will summarize in a brief and concise manner, the proposer's understanding of the scope of work and make a positive commitment to timely perform the work. The letter should not exceed 2 pages in length.

Town of Howey-in-the-Hills
Victoria Pedane
101 N Palm Ave.
Howey-in-the-Hills, FL 34737

September 2, 2025

Dear Ms. Roszkiewicz,

On behalf of GrayRobinson, we are pleased to offer this proposal to continue to provide legal services for the Town Council of the Town of Howey-in-the-Hills (the Town). We present the enclosed qualifications detailing the proposed team's professional capabilities and accomplishments, making us uniquely prepared to provide these services.

GrayRobinson has proudly served as Town Attorney since 2006. For nearly 20 years, we have developed a deep understanding of the Town's operational structure, policy priorities, legal landscape, and future goals. This long-standing relationship has given us valuable insight into the Town's organizational culture, administrative practices, and the legal issues most critical to its success. We understand not just the legal framework, but also the Town's practical needs and the importance of responsive, solutions-oriented counsel.

GrayRobinson meets and exceeds the training and experience requirements specified. Our attorneys are members in good standing with The Florida Bar and have extensive local government experience and expertise, including litigation, ordinance and resolution drafting, and board advisement. Combined, our team has decades of experience representing cities, counties and special districts and possesses deep knowledge of the legal and constitutional principles that impact municipal operations.

We value our long-term partnership with the Town and look forward to the opportunity to continue serving in this important capacity. Please do not hesitate to contact us with any questions or requests for additional information.

Regards,



Heather Ramos
Shareholder, GrayRobinson

C. QUALIFICATIONS

Provide the qualifications and experience of those who will provide the services. The submission should include:

- i. **Details on the qualifications of key individual(s) who will perform the work; including education, experience and specialized knowledge and experience in similar work.**
-

TEAM LEAD HEATHER RAMOS

QUALIFICATIONS

Heather represents public sector clients in all aspects of state and local government law. Her experience includes issues relating to utilities and land use, as well as legislative and governmental affairs on the local and state levels. Heather provides a broad scope of legal services involving Florida's Public Records and Open Meeting Law, ethics and gift laws, special assessments, taxation and public finance, utility law, and constitutional law. She advises clients operating across Florida's dynamic economy, including cities, counties, utilities, and special districts, among others.

As a complement to her public sector work, Heather collaborates with clients on land use and the development of commercial, residential, and mixed-use projects. Her experience includes planned unit developments, subdivision plats, annexation agreements, acquisitions and sales, financing, vested rights, impact fees, utility agreements, concurrency, road construction agreements, wetlands mitigation, zoning, and permitting. What Heather knows about land developers will be a huge asset for the Town as it faces land-development pressures for many years to come.

EXPERIENCE

Heather serves as the town attorney for the Towns of Windermere and Howey-in-the-Hills, city attorney for the City of Milton, general counsel to the New Smyrna Beach Utilities Commission, the Orange County Library District, Space Florida, and assistant general counsel to the North Brevard County Hospital District and the Toho Water Authority. She previously served as assistant counsel to the Orange County and Seminole County Property Appraisers.

In these roles, Heather has advised on a range of legal issues, demonstrating a strong understanding of the unique needs and operations of local government entities.

EDUCATION

- J.D., Stetson University College of Law, 2002, *cum laude*
- B.A., University of Central Florida, 1999, *with honors*

TEAM MEMBER DEBORAH LA FLEUR, B.C.S.

QUALIFICATIONS

Deborah is board-certified in Labor and Employment Law by The Florida Bar. She has significant experience representing public and private sector employers, including government entities, nonprofits, healthcare providers, and corporations, in virtually all areas of labor and employment law. Her work spans discrimination and wage and hour claims, FMLA and WARN Act issues, restrictive covenant enforcement,

and ADA compliance. She also regularly advises on constitutional, tort, and whistleblower matters, as well as federal contract compliance and labor relations, including collective bargaining and union election preparation. Beyond litigation, Deborah assists clients with drafting policies and employee handbooks, developing workplace accessibility strategies, and providing training on employment law and compliance.

EXPERIENCE

With more than two decades of practice, Deborah has developed a wide-ranging career advising employers in both litigation and regulatory arenas. She has represented employers before state and federal courts as well as administrative agencies, including the Equal Employment Opportunity Commission, the Florida Commission on Human Relations, the U.S. Department of Labor, Florida's Division of Workers' Compensation, and the Florida Public Employees Relations Commission. She is also a frequent speaker on employment law issues, presenting at professional seminars, bar association events, and GrayRobinson's own employment law programs. Through this combination of hands-on litigation, compliance counseling, and educational outreach, Deborah has built a reputation as a trusted advisor to employers navigating the complexities of modern workplace law.

EDUCATION

- J.D., Valparaiso University School of Law, 1997
- B.A, Aquinas College, 1993

TEAM MEMBER TOM WILKES

QUALIFICATIONS

Tom brings more than 45 years of experience in local government law and is recognized statewide as a leader in this field. His expertise spans land use, taxation and finance, utility law, constitutional and administrative law, as well as litigation involving public entities. He has been entrusted with significant leadership roles, including serving as County Attorney for Orange County for over a decade, and has been appointed multiple times to the Orange County Charter Review Commission, where he was twice elected chair by his peers. Tom also serves as general counsel to key Florida institutions, including Space Florida, Career Source Central Florida, and the Orange County Library District, and as town attorney for the Town of Windermere. His qualifications are further reflected by his frequent invitations to speak on "good government" laws, such as Sunshine Law, ethics, financial disclosure, and public records.

EXPERIENCE

Tom's career reflects a deep history of handling some of the most complex governance, construction, and financing matters in Florida. While serving as Orange County Attorney from 1990 to 2002, he oversaw the legal functions of county government under three successive County mayors. During that time, he guided the County through transformative initiatives, including structuring and negotiating cutting-edge tax-increment financings. His work included drafting the documents for the International Drive CRA, structuring financing for the I-4/Osceola Parkway interchange, and negotiating tax-increment arrangements for the Conroy Road and Universal Boulevard interchanges.

His leadership earned the Orange County Attorney's Office national recognition, receiving the American Bar Association's Jefferson Fordham Award in 2001 for government law-office accomplishment. After joining GrayRobinson, Tom has continued to serve as trusted counsel to numerous public entities, including hospital

districts, counties, and municipalities, applying his knowledge of complex financing, taxation, land use and regulatory matters to advance client goals. His work demonstrates not only long-standing expertise but also innovative problem-solving in the areas most critical to local governments.

EDUCATION

- J.D., University of Florida, 1978
- M.P.A., University of West Florida, 1976
- B.S., U.S. Naval Academy, 1969

TEAM MEMBER NATALIE YELLO, B.C.S.

QUALIFICATIONS

Natalie is board-certified in Construction Law by The Florida Bar. She specializes in the full lifecycle of construction law, bringing strategic, client-focused counsel to public sector clients. Natalie's dual focus on contracting and litigation gives her a comprehensive edge: she is deeply proficient in drafting and negotiating complex design and construction contracts.

EXPERIENCE

Natalie's experience spans from contract inception to dispute resolution. On the transactional side, she guides clients through end-to-end contract services, from negotiating design and construction agreements to ensuring that project specifications align with legal and operational goals. On the litigation side, Natalie has represented clients in high-stakes matters such as mechanic's lien disputes, tort claims, and construction defect litigation. Her deep understanding of both the legal framework and the practical complexity of construction enables her to craft solutions that anticipate risks and drive projects to successful outcomes.

EDUCATION

- J.D., Stetson University College of Law, 2017, *cum laude*
- B.S., B.A., University of Florida, 2013, *cum laude*

TEAM MEMBER CHRISTINA EPPERSON

QUALIFICATIONS

Christina centers her practice on local government law, with a particular focus on real estate and land use matters. She began working with GrayRobinson as a summer associate in 2022 and continued to work with the Local Government Team as a law clerk until joining the firm as an associate in 2024. Throughout her time at GrayRobinson, Christina has gained valuable experience assisting local government clients with matters involving ordinances, resolutions, public records, and land use issues.

EXPERIENCE

Under the supervision and mentorship of Lead Attorney Heather Ramos, Christina diligently supports matters involving ordinances, resolutions, public records, contracts, and government ethics. She assists in drafting and reviewing legal documents, researching municipal law issues, and ensuring compliance with state and local regulations.

EDUCATION

- J.D., Florida A&M University College of Law, 2024, magna cum laude, Valedictorian
- TQUK Level 5 Certificate in Teaching English as a Foreign Language, The TEFL Academy, 2018
- B.A., Virginia Commonwealth University, Honors College, 2014, magna cum laude

ii. Details on the qualifications including documentation of experience with similar work during the past 10 years; include firm size, structure, location of management and charter authorization and licenses to do business in the State of Florida.

For more than five decades, GrayRobinson has represented municipalities, counties, special districts, and other public entities in matters involving local government law, land use and zoning, public finance, utilities, procurement, and litigation. Over the past ten years, the firm has served as general or special counsel to numerous Florida cities, towns, and governmental boards, providing advice and representation on a wide range of legal issues similar to those contemplated in this engagement. This experience includes drafting and negotiating contracts, advising on governance and ethics, handling land use and development applications, addressing public records and Sunshine Law compliance, representing clients in administrative and judicial proceedings, and guiding public finance and bond transactions.

GrayRobinson, P.A. is a full-service law and lobbying firm with more than 275 attorneys and consultants across 15 offices throughout Florida and one in Washington, D.C. Established in 1970, the firm is organized as a professional association under the laws of the State of Florida and is fully authorized and licensed to conduct the practice of law within the state.

Dean Cannon is the President and CEO of GrayRobinson and is located in the Firm's Tallahassee office at 301 S. Bronough Street, Suite 600, Tallahassee, FL 32301. Byrd F. "Biff" Marshall, Jr. serves as chair of the board and is located in the Firm's Orlando office at 301 E. Pine Street, Suite 1400, Orlando, FL 32801. J. Charles "Charlie" Gray serves as chair emeritus and founding director of GrayRobinson and is located in the Firm's Orlando office at 301 E. Pine Street, Suite 1400, Orlando, FL 32801. Additional board members include Treasurer Michael E. Neukamm, located in the Firm's Orlando office at 301 E. Pine Street, Suite 1400, Orlando, FL 32801, Secretary Mark D. Schellhase, located in the Firm's Boca Raton office at 2255 Glades Road, Suite 301E, Boca Raton, Florida 33431, and Assistant Treasurer Jason Unger located in the Firm's Tallahassee office at 301 S. Bronough Street, Suite 600, Tallahassee, FL 32301.

The following pages contain GrayRobinson's registration with the Division of Corporations. We have also included team members' Florida Bar licenses, authorizing them to perform legal work in Florida.



DIVISION of
CORPORATIONS
an official State of Florida website

[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

Detail by Entity Name

Florida Profit Corporation
GRAYROBINSON, P.A.

Filing Information

Document Number

602357

FEI/EIN Number

59-1300132

Date Filed

08/26/1970

State

FL

Status

ACTIVE

Last Event

NAME CHANGE AMENDMENT

Event Date Filed

11/10/2003

Event Effective Date

NONE

Principal Address

301 E. PINE STREET, SUITE 1400
ORLANDO, FL 32801

Changed: 01/11/2001

Mailing Address

P.O. BOX 3068
ORLANDO, FL 32802-3068

Changed: 10/13/2016

Registered Agent Name & Address

Cannon, R. DEAN
301 S. BRONOUGH STREET, SUITE 600
TALLAHASSEE, FL 32301

Name Changed: 09/26/2019

Address Changed: 09/26/2019

Officer/Director Detail

Name & Address

Title Director, Chairman

MARSHALL, BYRD F., Jr.
301 E. PINE STREET, SUITE 1400
ORLANDO, FL 32801

Title Director, Chairman Emeritus

GRAY, J. Charles
301 E. PINE STREET, SUITE 1400
ORLANDO, FL 32801

Title Director, Treasurer

Neukamm, Michael E.
301 E. PINE STREET, SUITE 1400
ORLANDO, FL 32801

Title Director, President & CEO

Cannon, R. Dean
301 S. BRONOUGH STREET, SUITE 600
TALLAHASSEE, FL 32301

Title Director, Secretary

SCHELLHASE, MARK D.
ONE BOCA PLACE
2255 GLADES ROAD
SUITE 301E
BOCA RATON, FL 33431

Title Director, Assistant Treasurer

UNGER, JASON
301 S. BRONOUGH STREET, SUITE 600
TALLAHASSEE, FL 32301

Annual Reports

Report Year	Filed Date
2024	01/30/2024
2024	10/21/2024
2025	04/14/2025

Heather Michele Blom-Ramos

Member in Good Standing

Eligible to Practice Law in Florida

Bar Number:	588601
Mail Address:	GrayRobinson P A 301 E Pine St Ste 1400 Orlando, FL 32801-2741 Office: 407-843-8880x26 Cell: 407-843-8880x26 Fax: 407-244-5690
Email:	heather.amos@gray-robinson.com
Personal Bar URL:	https://www.floridabar.org/mybarprofile/588601
vCard:	
County:	Orange
Circuit:	09
Admitted:	09/20/2002
10-Year Discipline History:	None
Law School:	Stetson University College of Law
Sections:	City, County & Local Govt Law Environmental & Land Use Law Government Lawyer

Deborah L La Fleur

Member in Good Standing

Eligible to Practice Law in Florida

Bar Number:	185590				
Mail Address:	GrayRobinson, P.A. PO Box 3068 Orlando, FL 32802-3068 Office: 407-843-8880 Cell: 407-843-8880 - No Text Messages Fax: 407-244-5690				
Email:	deborah.lafleur@gray-robinson.com				
Personal Bar URL:	https://www.floridabar.org/mybarprofile/185590				
vCard:					
County:	Orange				
Circuit:	09				
Admitted:	10/08/1999				
10-Year Discipline History:	None				
Law School:	Valparaiso University School of Law				
Board Certifications:	<table><tr><th>Area</th><th>Year</th></tr><tr><td>Labor and Employment Law</td><td>2017</td></tr></table>	Area	Year	Labor and Employment Law	2017
Area	Year				
Labor and Employment Law	2017				

Thomas J Wilkes Jr.

Member in Good Standing Eligible to Practice Law in Florida

Bar Number:	261734
Mail Address:	GrayRobinson P A 301 E Pine St Ste 1400 Orlando, FL 32801-2741 Office: 407-843-8880 Cell: 407-843-8880 - No Text Messages Fax: 407-244-5690
Email:	tom.wilkes@gray-robinson.com
Personal Bar URL:	https://www.floridabar.org/mybarprofile/261734
vCard:	
County:	Orange
Circuit:	09
Admitted:	11/06/1978
10-Year Discipline History:	None
Law School:	University of Florida, Fredric G. Levin College of Law
Sections:	City, County & Local Govt Law Environmental & Land Use Law

Natalie Marian Yello

Member in Good Standing

Eligible to Practice Law in Florida

Bar Number: 1002900



Mail Address: GrayRobinson, P.A.
Orlando, Florida 32801
301 E Pine St Ste 1400
Orlando, FL 32801-2741
Office: 407-843-8880
Fax: 407-244-5690

Email: natalie.yello@gray-robinson.com

Personal Bar URL: https://www.floridabar.org/mybarprofile/1002900

vCard:

County: Orange

Circuit: 09

Admitted: 09/22/2017

10-Year Discipline History: None

Law School: Stetson University College of Law

Board Certifications:	Area	Year
	Construction Law	2025

Christina Renee Epperson

Member in Good Standing

Eligible to Practice Law in Florida

Bar Number:	1059159
Mail Address:	Ms. Christina Epperson 301 E Pine St Ste 1400 Orlando, FL 32801-2741 Office: 407-204-3118
Email:	christina.epperson@gray-robinson.com 
Personal Bar URL:	https://www.floridabar.org/mybarprofile/1059159
vCard:	
County:	Orange
Circuit:	09
Admitted:	09/30/2024
10-Year Discipline History:	None
Law School:	Florida A&M University, College of Law, 2024
Sections:	City, County & Local Govt Law Environmental & Land Use Law Government Lawyer Labor and Employment Law Young Lawyers

Provide information on professional qualifications to provide the services as requested and include ratings and/or recognition in the legal community for professional achievement.

Lead Town Attorney Heather Ramos, Managing Shareholder of the firm's Orlando office, has built her career representing municipalities and public-sector clients across Florida. She regularly advises on land use, utilities, public finance, and legislative matters, and is recognized in Best Lawyers in America for her work in Land Use and Zoning Law and in Florida Trend's Legal Elite NOTABLE - Women Leaders in Law.

Team Member Deborah La Fleur is board-certified in labor and employment law by The Florida Bar and brings deep experience in providing legal counsel to both public- and private-sector employers. She has served as trusted counsel on a wide array of matters including advising on compliance with federal, state, and local regulations; drafting and reviewing policies, employment contracts, and administrative procedures; and defending clients in litigation and administrative proceedings before courts and agencies such as the EEOC, FCHR, the Division of Workers' Compensation, the U.S. Department of Labor, and PERC. Her peers recognize her as a top-tier employment law practitioner – Chambers USA consistently ranks her in Band 4 for Labor & Employment in Florida.

Team Member Tom Wilkes has more than 45 years of experience in local government law, including service as Orange County Attorney. His practice covers constitutional, administrative, and litigation matters, as well as land use, transportation, and utility law. Tom is widely regarded as one of Florida's preeminent municipal attorneys and has received recognition in Best Lawyers in America and other peer-reviewed publications for his longstanding contributions to local government law.

Team Member Natalie Yello is board-certified in Construction Law by The Florida Bar and brings significant experience counseling public and private clients. She regularly drafts and negotiates complex contracts, ordinances, and agreements, and she represents clients in administrative proceedings, arbitration, and civil litigation. Her practice includes advising on compliance with federal, state, and local regulations and providing cost-effective strategies for resolving disputes. Natalie has been named to Best Lawyers in America – Ones to Watch for Construction Law and has been selected as a Florida Super Lawyers Rising Star in Construction Litigation. In addition, she serves in a leadership role as Co-Chair of the Litigation Subcommittee of The Florida Bar's Construction Law Committee.

Assistant Town Attorney Christina Epperson brings strong academic credentials and practical experience in local government, land use, and real estate law. She joined GrayRobinson following her clerkship with the firm, where she developed experience in transactional matters and public-sector representation. Christina is an active member of The Florida Bar and brings valuable energy and focus to client engagements, complementing the team's depth of experience.

As a firm, GrayRobinson is consistently recognized among Florida's top law firms, with numerous attorneys listed in Best Lawyers in America, Chambers USA, and Florida Super Lawyers. The firm's reputation for excellence, combined with the specific experience and recognition of the attorneys dedicated to this engagement, ensures that the Town will be represented by professionals whose qualifications and achievements are well respected throughout the legal community.

Identify and include qualifications and resumes of specific individuals who will provide legal services to the Town of Howey-in-the-Hills, including the name and qualifications of the attorney who will be designated as the Town Attorney.

Below are full biographies of the proposed team. Heather Ramos will be the Lead Town Attorney, and Christina Epperson will be the Assistant Lead Town Attorney. Deborah La Fleur, Tom Wilkes, and Natalie Yello will provide support as needed.



Lead Town Attorney: Heather M. Ramos

Orlando Managing Shareholder

heather.ramos@gray-robinson.com
407.843.8880

Focus

- Government
- Land Use Law
- Utilities

Versatile state and local government lawyer serving public and private sector clients across Florida. Focus on land use, development, and governmental affairs.

Heather Ramos represents public sector clients in all aspects of state and local government law. Her expertise includes issues relating to land use and real estate development, as well as legislative and governmental affairs on the local and state levels. Heather provides a broad scope of legal services involving Florida's Public Records and Open Meeting Law, ethics and gift laws, special assessments, taxation and public finance, utility law, and constitutional law. She advises clients operating across Florida's dynamic economy, including cities, counties, utilities, special districts, and landowners, among others.

For state and local governments, Heather currently serves as the town attorney for the Towns of Windermere and Howey-in-the-Hills, city attorney for the City of Milton, general counsel to the New Smyrna Beach Utilities Commission, the Orange County Library District, assistant general counsel to Space Florida, and assistant general counsel to the North Brevard County Hospital District. Informed by decades of municipal service and advocacy, she frequently teams with GrayRobinson colleagues in public financing, environmental and sustainability, government affairs and lobbying, and real estate practices to provide comprehensive and integrated legal support for clients.

Recognition

- *Best Lawyers in America*, Land Use and Zoning Law, 2020-2025
- *Orlando Magazine*, Best Lawyers, 2021
- *Martindale-Hubbell*, AV® Preeminent Rated

Insights

- Moderator, "Restoring Bilateral Trade Between Canada and Florida," GrayRobinson Webinar, March 11, 2021

Affiliations

- The Florida Bar
 - Local Government Law Section
 - Environmental and Land Use Section
- Orange County Bar
 - Environmental and Land Use Committee, Co-Chair, 2004-2005
- Historical Society of Central Florida
 - Board of Directors

Credentials

- J.D., Stetson University College of Law, 2002, *cum laude*
- B.A., University of Central Florida, 1999, *with honors*

Admissions

- Florida

**Team Member: Deborah L. La Fleur, B.C.S.
Shareholder**

deborah.lafleur@gray-robinson.com
407.843.8880

Focus

- Labor and Employment
- OSHA
- Trade Secret, Noncompete and Unfair Competition

Advisor to public and private sector employers facing employment law disputes and workforce risk. Board-certified in Labor and Employment Law by The Florida Bar.

Deborah La Fleur is board-certified in Labor and Employment Law by The Florida Bar and represents private and public sector employers in both labor and employment law matters. The majority of Deborah's background and experience is in advising and representing corporations, management, nonprofit entities, healthcare providers, and governmental entities. Deborah represents employers, in federal and state courts and in front of governmental agencies, in connection with all employment-related matters including but not limited to: discrimination; Fair Labor Standards Act (including collective actions); state wage and hour claims; Family and Medical Leave Act; the WARN Act; the enforcement of restrictive covenants, such as covenants not to compete; Americans With Disabilities Act (including its employment and accessibility provisions, such as Title III of the ADA); constitutional claims; torts; whistleblower litigation; compliance with the Office of Federal Contract Compliance; labor-related issues, including but not limited to, preparation and interpretation of collective bargaining agreements, assisting employers during the union election process and defending against unfair practice charges; preparation of employment handbooks, contracts, and a variety of employment-related policies; and providing training on employment-related matters and workplace and public accommodation accessibility compliance. In addition, Deborah has experience in corporate matters, including the employment aspects of mergers and acquisitions and commercial litigation issues.

Deborah also represents employers in state and federal courts, investigations, and in defense of charges of discrimination before the U.S. Equal Employment Opportunity Commission, the Florida Commission on Human Relations, Florida's Division of Workers' Compensation, the U.S. Department of Labor and the Florida Public Employees Relations Commission.

Recognition

- *Best Lawyers in America*, 2026
 - o Employment Law - Management
- *Chambers USA*, Labor and Employment, 2020-2025
 - o Recognized Practitioner, 2016-2019

- *Martindale-Hubbell, AV® Preeminent Rated*

Insights

- "Worker Adjustment and Retraining Notification (WARN)," The Florida Bar 25th Labor and Employment Law Annual Update and Certification Review, January 16-17, 2025
- "Union Awareness," ABC Central Florida Training and Development Seminar, October 17, 2024
- "Navigating the 2023 Labor and Employment Law Landscape: What Employers Should Know," GrayRobinson Labor and Employment Webinar, June 15, 2023
- GrayRobinson's 24th Annual Employment Law Seminar, May 5, 2022
- "Top 10 Hits' Avoid Employee Lawsuits," ABC Central Florida, September 22, 2021
- GrayRobinson's 23rd Annual Employment Law Seminar, April 1, 2021
- "Update on Federal COVID-19 Employment and Business Programs," Seminole County Chamber and the Apopka Area Chamber, April 15, 2020

Affiliations

- Orange County Bar Association
 - Labor and Employment Law Committee
- Federal Bar Association
- Society for Human Resource Management, Member
- Academy of Florida Management Attorneys, Member
- Leadership Seminole
 - Board of Directors, Member
 - Chair, 2017-2018
 - Chair-Elect, 2016-2017
 - Secretary, 2015-2016
 - Presidential Alumni
- Seminole Task Force to Impact Homelessness
- Greater Orlando Business Network, Past Board Member

Credentials

- **Aquinas College, B.A.** (1993)
- **Valparaiso University School of Law, J.D.** (1997)
- Board-certified in Labor and Employment Law by The Florida Bar

Admissions

- Florida
- Michigan
- U.S. District Court for the Western District of Michigan
- U.S. District Court for the Southern, Middle, and Northern Districts of Florida



Team Member: Thomas J. Wilkes

Of Counsel

tom.wilkes@gray-robinson.com
407.843.8880

Focus

- Government
- Transportation
- Land Use Law
- Public Finance

Trusted leader in Florida local government law, with a legacy shaped by decades of public service and legal innovation. Instrumental in transforming policy, infrastructure, and governance across the state.

Tom Wilkes has over 45 years of experience in local government law. As a partner at GrayRobinson from 1978 to 1991, he served on the 1986 and 1988 charter commissions that resulted in sweeping changes to the form of government for Orange County, including the creation of the office of the Orange County Mayor. Then, in 1990, the first Orange County Mayor, Linda Chapin, asked Tom to serve as her county attorney. He accepted the offer, resigned from GrayRobinson, became the County Attorney and stayed in the position for 12 years, serving under three county mayors (Chapin, Mel Martinez and Rich Crotty) and gaining a reputation statewide as a practitioner in local government law. In 2001, his leadership resulted in the County Attorney's Office being given the ABA's Jefferson Fordham Award for government law-office accomplishment – a recognition that the office was perhaps the top government law office in the nation. In 2003 and 2004, Tom was once again appointed to serve on the Orange County Charter Review Commission. He was appointed by then-County Commissioner (now chair of the Orange County Public School Board) Teresa Jacobs and was elected by the Charter Review Commission members to serve as the commission chair.

As Orange County Attorney, Tom was involved specifically and extensively in some of the most complex construction and regulatory matters in the County's history. He was also the lead County staff person in complex financings, including several cutting-edge "tax increment" matters. He drafted the documents for the International Drive CRA, still functioning and funding needed improvements to the I-Drive tourist and convention area. He structured the non-CRA tax-increment financing for the interchange at I-4 and the Osceola Parkway, which involved Orange County and the Reedy Creek Improvement District. Tom also negotiated the tax-increment financing for the Conroy Road and Universal Boulevard interchanges on I-4, both done by the City of Orlando's CRA's with Orange County's consent.

Upon leaving the county in 2002, Tom rejoined GrayRobinson. He concentrates on all aspects of state and local government law, such as land use, taxation and finance, utility law, constitutional law, administrative law and litigation. He was general counsel to Space Florida, the state agency responsible for developing

commercial aerospace industries in Florida. He was also general counsel to Career Source Central Florida and the Orange County Library District and served from 2007 to 2019 as town attorney for the Town of Windermere. He has served as special counsel to numerous hospital districts, counties and cities and is asked frequently to speak to public agencies on "good government" law (Sunshine Law, ethics, gift law, financial-disclosure rules, and public-records law). Tom has particular expertise in local government taxation, including property taxation, local government sales taxes, and special district taxation.

Tom is a native Floridian and nearly a lifelong resident of Orlando. He graduated from the U.S. Naval Academy and served six years as a Navy pilot and flight instructor. Upon resigning his commission, Tom received a master's degree in public administration from the University of West Florida and his juris doctor from the University of Florida. He then served as a primary assistant to GrayRobinson's founding partner J. Charles Gray from 1978 to 1985 when Gray was the Orange County Attorney.

Recognition

- *Best Lawyers in America*, 2015-2020
 - Lawyer of the Year, Government Relations Practice, 2019
 - Lawyer of the Year, Government Relations Practice, 2017
- *Orlando Business Journal*, Best of the Bar, 2006
- *Orlando Magazine*, Best Lawyers, 2019
- *Orlando Magazine*, Lawyer of the Year, Government Relations Practice, 2019
- *Orlando Magazine*, Woodward/White Best Lawyers List, honoree, 2019
- *Martindale-Hubbell*, AV® Preeminent Rated
- *Florida Super Lawyers*, 2010-2013, 2015-2019
- *Florida Trend*, Legal Elite, 2006-2008, 2013

Affiliations

- The Florida Bar
 - Local Government Law Section
 - Environmental and Land Use Law Section
 - Judicial Nominating Commission, 9th Judicial Circuit, Member, 1989-1991
- National Lawyers Association
- Florida Association of County Attorneys, Officer and Director, 1992-2002
 - President, 1997-1998
 - Chair, 1998-1999
- Orange County Charter Review Commission, Member, 1988, 2004
 - Chair, 2004
- Orange County Charter Review Commission
 - Orange County Citizens Charter Committee, Chair, 1986
- Coalition for the Homeless of Central Florida, Member
 - Board of Directors, 2003-2007
- Mayor Buddy Dyer's Downtown Transition Strategic Task Force, Member, 2003
- National Association of Christians and Jews, Director, 1993-2000

Credentials

- J.D., University of Florida, 1978
- M.P.A., University of West Florida, 1976
- B.S., U.S. Naval Academy, 1969

Admissions

- Florida



Team Member: Natalie M. Yello, B.C.S. Of Counsel

natalie.yello@gray-robinson.com
407.843.8880

Focus

- Construction
- Corporate

Board-certified by The Florida Bar in Construction Law. Delivering strategic, end-to-end counsel on design and construction contracts for projects across Florida.

Natalie concentrates her practice on a broad range of construction topics, serving a diverse clientele that includes commercial property and business owners, general contractors, architects, engineering firms, and public entities. Board-certified in Construction Law, she focuses primarily on the careful drafting and negotiation of contracts for a wide variety of construction projects throughout Florida, including healthcare facilities, airports, office buildings, condominiums, and restaurants.

In addition to contract matters, Natalie has significant experience in construction-related litigation. She regularly defends clients against tort and professional malpractice claims, assesses mechanic's lien issues, and litigates construction defect disputes. Her deep understanding of both the legal and operational sides of construction enable her to deliver strategic, results-driven counsel from project inception to final resolution.

Recognition

- *Best Lawyers in America*, Ones to Watch, Construction Law, 2025-2026
- *Florida Super Lawyers*, Rising Stars, Construction Litigation, 2022-2025

Insights

- "Design and Construction Contracts," GrayRobinson Construction Law Seminar, February 7, 2024
- "Understanding Design Assist and Design Delegation: Distinctions and Differences," Construction Law Institute, 2021
- "Construction Industry Update," GrayRobinson Construction Law Seminar, September 14, 2021
- "What's Keeping You Up At Night?" Co-presenter, GrayRobinson's 23rd Annual Employment Law Seminar, April 1, 2021
- "Case Law Update," *Constructive Talk Volume VI, Issue I*, The Florida Bar Construction Law Committee, 2020
- "Doing Deals and Disputes in 2020: Revive, Restructure, or Rend Apart," Association of Corporate Counsel of Central Florida, October 15, 2020

- "The Lowdown on Latent Defects," *Constructive Talk Newsletter, Volume VII, Issue II*, The Florida Bar Construction Law Committee, 2020
- "Explanation of Keystone Airpark Authority v. Pipeline Contractors, Inc.," The Florida Bar Construction Law Committee Continuing Legal Education Course, March 16, 2020
- "Repair Costs Can Be Consequential Damages: Understanding the Keystone Court's Departure from the Typical Definition of Consequential Damages," *ActionLine publication, Vol. XXXXI No. 2*, Real Property, Probate and Trust Law Section, The Florida Bar
- "Case Law Update," *Constructive Talk Volume VI, Issue I*, The Florida Bar Construction Law Committee, 2020

Affiliations

- The Florida Bar
 - Real Property Probate and Trust Law Section
 - Construction Law Committee
 - Litigation Subcommittee, Co-Chair
- Guardian Ad Litem, 6th Judicial Circuit, 2014-2016
- Support Our Scholars Program, Board of Directors

Credentials

- J.D., Stetson University College of Law, 2017, *cum laude*
 - *Journal of International Aging Law and Policy*, Editor-in-Chief
- B.S., B.A., University of Florida, 2013, *cum laude*
- Board-certified by The Florida Bar in Construction Law

Admissions

- Florida
- U.S. District Court for the Northern and Middle Districts of Florida



Assistant Town Attorney: Christina Epperson

Associate

christina.epperson@gray-robinson.com
407.843.8880

Focus

- Real Estate
- Land Use Law
- Government

Dedicated attorney with hands-on legal experience and a sharp analytical approach.

Christina Epperson, an associate attorney in the GrayRobinson Orlando office, centers her practice on local government, real estate, and land use law. With a strong commitment to advocacy and a focus on personalized counsel, Christina guides clients through multifaceted legal challenges, ensuring they remain informed at every stage.

During law school, Christina served as a judicial law clerk for the Honorable Rodney Smith of the United States District Court for the Southern District of Florida and as a constitutional and property law research assistant. She was an inaugural fellow of the Florida A&M University College of Law Economic Justice Clinic, where she provided transactional legal services to underserved businesses and individuals throughout Orlando. Christina began working with GrayRobinson as a summer associate in 2022 and continued to work with the Local Government Team as a law clerk until joining the firm as an attorney in 2024.

Recognition

- Florida A&M University College of Law Book Awards
 - o Legal Research and Writing I, 2020
 - o Legal Research and Writing II, 2021
 - o Property and Torts, 2021
 - o Constitutional Law II, 2022
 - o Evidence, 2022

Credentials

- J.D., Florida A&M University College of Law, 2024, *magna cum laude*, Valedictorian
 - o Florida A&M University Law Review, Assistant Articles Editor
- TQUK Level 5 Certificate in Teaching English as a Foreign Language, The TEFL Academy, 2018
- B.A., Virginia Commonwealth University, Honors College, 2014, *magna cum laude*

Admissions

- Florida

Identify the location and availability of staff to provide services and the depth of firm’s ability to provide comprehensive services. Include the firm’s national, statewide and local service capabilities, including skilled technical and market resources of the firm.

All of the attorneys proposed for this engagement are based in GrayRobinson’s Orlando office, located at 301 East Pine Street, Suite 1400, Orlando, Florida 32801. This provides the Town with the benefit of a fully integrated team that works in close proximity to one another and is readily available to respond to the Town’s needs.

Beyond the immediate team, GrayRobinson offers the resources of a full-service law firm with offices across Florida and in Washington, D.C. The firm’s statewide footprint enables us to provide comprehensive services that extend well beyond Orlando, including access to attorneys skilled in public finance, environmental and sustainability law, government affairs, lobbying, and real estate development. This breadth of services allows us to bring together the right mix of technical expertise and practical experience to address the Town’s needs as they arise.

In short, the Town will benefit not only from the availability of three attorneys dedicated to its matters daily, but also from the depth of a multidisciplinary firm with statewide and national reach. This combination ensures responsive, cost-effective, and comprehensive representation in all facets of local government law.

D. FEE PROPOSAL

The firm shall submit a proposal for compensation which should include, but is not limited to, an hourly rate option, monthly and/or annual fee options, if applicable, or a combination of these options.

The fee schedule shall include the following information:

- i. **Provide breakdown of the hourly rates for the Town Attorney, assistant Town attorneys, senior attorneys and every other attorney, paralegal or staff member anticipated to provide services to the Town of Howey-in-the-Hills.**

Below is a breakdown of attorneys and staff who are anticipated to provide services to Howey-in-the-Hills:

Professional	Hourly Rate
Town Attorney Heather Ramos	\$310
Senior Attorney Tom Wilkes	\$310
Assistant Town Attorney Christina Epperson	\$265
Paralegal	\$145

- ii. **Proposed monthly and/or annual fee options.**

We propose an hourly rate structure as follows: Shareholders \$310 per hour, Associates \$265 per hour, and paralegals \$145 per hour.

- iii. **The rates for reimbursable and/or out-of-pocket expenses, including, but not limited to, word processing, photocopying, faxing, etc. Local travel costs associated with this work should be included in the fee proposal and will not be considered as an additional cost or reimbursable item.**

The hourly rates above are inclusive of all reimbursable or out-of-pocket expenses.

- iv. **The proposed rates for any and all other fee proposals or arrangements outside the standard hourly rates, if any.**

Should litigation arise in connection with our engagement, the hourly rates for those services may be increased, depending on the complexity of the case, but only if negotiated between the Town and the Firm and agreed to by the Town.

E. OTHER INFORMATION REQUIRED

- i. **List all judgments or lawsuits in which the firm or attorneys have been involved within the last 5 years, including the nature of the lawsuit and the resolution thereof. List all lobbyists employed and the areas in which they lobby.**
-

There have been isolated cases where The Florida Bar was required to inquire of GrayRobinson attorneys regarding alleged grievances or complaints. All inquiries have concluded with no determinations made in favor of the complainants or a finding of probable cause; thus, those inquiries were dismissed.

Below is a list of GrayRobinson's government affairs and lobbying professionals, complete with state of registration. Each is registered to lobby for public and private clients on behalf of the legislative and executive branches of state and/or federal government.

- | | |
|---|--------------------------------------|
| ▪ David Allen (Florida) | ▪ Lily Israel (Washington, D.C.) |
| ▪ Kylee Anzueto (Florida) | ▪ Kevin Jogerst (Washington, D.C.) |
| ▪ John Ariale (Washington, D.C.) | ▪ George Levesque (Florida) |
| ▪ Dean Cannon (Florida, Washington, D.C.) | ▪ Jessica Love (Florida) |
| ▪ Christopher Carmody (Florida) | ▪ Ryan Matthews (Florida) |
| ▪ Carlecia Collins (Florida) | ▪ Chris McCannell (Washington, D.C.) |
| ▪ Larry Cretul (Florida) | ▪ Kim McDougal (Florida) |
| ▪ Christopher Dawson (Florida) | ▪ Kirk Pepper (Florida) |
| ▪ Angela Drzewiecki (Florida) | ▪ Joseph Salzverg (Florida) |
| ▪ Thomas Feeney (Washington, D.C.) | ▪ Burt Saunders (Florida) |
| ▪ Blair Hancock (Washington, D.C.) | ▪ Robert Stuart Jr. (Florida) |
| | ▪ Jason Unger (Florida) |

- ii. **List any clients you currently represent that could cause a conflict of interest with your responsibilities to the Town of Howey-in-the-Hills. Describe how you would be willing to resolve these or any future conflicts of interest.**
-

GrayRobinson currently has a waiver in place with the Town of Howey-in-the-Hills regarding the firm's representation as General Counsel of Lake County Schools. Beyond that, we are not aware of any potential conflict of interest that would arise from our continued representation of the Town and will take the necessary steps to avoid conflicts of interest in the future.

If a potential conflict arises, we will seek a waiver from one or both parties, as was done in the above mentioned situation. If a waiver or agreement cannot be reached, we will address the issue and withdraw if necessary. The honor of representing Town is one we take seriously, and we will do all that is necessary to ensure the Town's interests are not maligned by our concurrent representation of other clients.

iii. **A copy of your business license number, state-issued and classifications, your authorization to perform work in Florida, and any other licenses applicable. Please include a W-9 form.**

Please refer to section c. QUALIFICATIONS (ii) for copies of applicable business and professional licenses.

A copy of our W9 is below.

Form W-9 (Rev. March 2024) Department of the Treasury Internal Revenue Service		Request for Taxpayer Identification Number and Certification Go to www.irs.gov/FormW9 for instructions and the latest information.		Give form to the requester. Do not send to the IRS.
Before you begin. For guidance related to the purpose of Form W-9, see <i>Purpose of Form</i> , below.				
Print or type. See specific instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) GrayRobinson, P.A.	2 Business name/disregarded entity name, if different from above.		
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only <u>one</u> of the following seven boxes. ☐ Individual/sole proprietor ☒ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate ☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☐ Other (see instructions)		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)	
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐		5 Address (number, street, and apt. or suite no.). See instructions. 301 E. Pine Street, Suite 1400	
	6 City, state, and ZIP code Orlando, FL 32801		7 List account number(s) here (optional)	
	Part I Taxpayer Identification Number (TIN)			
	Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later. Note: If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.		Social security number ____ - ____ - ____ OR Employer identification number 5 9 - 1 3 0 0 1 3 2	
	Part II Certification			
Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.				
Sign Here	Signature of U.S. person 	Date 8-22-25		
General Instructions				
Section references are to the Internal Revenue Code unless otherwise noted.				
Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9 .				
What's New				
Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.				
Purpose of Form				
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they				

- iv. **List at least 3 Florida references showing performance of similar type contracts in the public sector or private sector of similar size (include names, addresses, and phone numbers of each contact person). At least 1 of these references should be from a Florida public sector entity.**

CITY OF DAVENPORT

Contact: Kelly Callihan, City Manager

Address: 1 South Allapaha Avenue, Davenport, Florida 33837

Email address: kcallihan@mydavenport.org

Phone number: 863.419.3300, ext. 129

Service Summary: GrayRobinson has served as City Attorney to the City of Davenport for the past 5 years.

TOWN OF WINDERMERE

Contact: Robert Smith, Town Manager

Address: 614 Main Street, Windermere, Florida 34786

Email address: rsmith@town.windermere.fl.us

Phone number: 407.876.2563, ext. 5324

Service Summary: GrayRobinson has served as Town Attorney to the Town of Windermere for the past 17 years.

CITY OF NEW SMYRNA BEACH UTILITIES COMMISSION

Contact: Efren Chavez, General Manager/CEO

Address: 200 Canal St, New Smyrna Beach, Florida 32168

Email address: echavez@nsbufl.com

Phone number: 386.424.3000

Service Summary: GrayRobinson has served as General Counsel for the City of New Smyrna Beach Utilities Commission since June 2018.

- v. **List of all public sector clients for past 5 years.**

Below is a list of current or recently represented public sector clients from the last five years.

- | | | |
|--|---|---|
| ▪ Agency for Health Care Administration | ▪ Brevard County Clerk of Court | ▪ Charlotte County |
| ▪ Alachua County | ▪ Broward County | ▪ Charlotte County Tax Collector |
| ▪ Alachua County Library District | ▪ Broward County Clerk of the Court | ▪ Citrus County |
| ▪ Alachua County Property Appraiser | ▪ Canaveral Port Authority | ▪ Citrus County Mosquito Control District |
| ▪ Alachua County Tax Collector | ▪ Cape Canaveral Hospital District | ▪ Citrus County School Board |
| ▪ Bay County | ▪ Cape Coral, City of | ▪ City of Apopka |
| ▪ Brevard County Board of County Commissioners | ▪ Central Florida Regional Transportation Authority | ▪ City of Belle Isle |
| | ▪ Central Florida Sports Commission | ▪ City of Bonita Springs |
| | | ▪ City of Bradenton |
| | | ▪ City of Bushnell |

- City of Clearwater
- City of Clermont
- City of Cocoa Beach
- City of Coral Gables
- City of Dade City
- City of Davenport
- City of Daytona Beach
- City of Deland
- City of Eagle Lake
- City of Fort Meade
- City of Fort Myers
- City of Fort Pierce
- City of Fort Walton Beach
- City of Gainesville
- City of Green Cove Springs
- City of Greenacres
- City of Groveland
- City of Hialeah
- City of Hollywood
- City of Jacksonville
- City of Jacksonville Beach
- City of Key West
- City of Kissimmee
- City of LaBelle
- City of Lake Alfred
- City of Lake City
- City of Lake Wales
- City of Lakeland
- City of Largo
- City of Lauderhill
- City of Macclenny
- City of Madeira Beach
- City of Maitland
- City of Miami
- City of Milton
- City of Miramar
- City of Mt. Dora
- City of Newberry
- City of New Smyrna Beach
Utilities Commission
- City of North Port
- City of Oakland Park
- City of Ocala
- City of Oldsmar
- City of Orlando
- City of Oviedo
- City of Palm Coast
- City of Pembroke Pines
- City of Pensacola
- City of Pinellas Park
- City of Plant City
- City of Polk City
- City of Pompano Beach
- City of Port Orange
- City of Port St. Lucie
- City of Rockledge
- City of Safety Harbor
- City of Sanford
- City of Sarasota
- City of Seminole
- City of South Daytona
- City of South Pasadena
- City of St. Cloud
- City of St. Petersburg
- City of St. Petersburg
Redistricting Commission
- City of Sunny Isles Beach
- City of Tallahassee
- City of Tamarac
- City of Tampa
- City of Titusville
- City of Vero Beach
- City of Wauchula
- City of West Palm Beach
- City of Wildwood
- City of Winter Haven
- City of Winter Park
- Clay County Utility
Authority
- Collier County Tax
Collector
- Columbia County Tax
Collector's Office
- DeSoto County
- Dixie District Schools
- East Lake Tarpon Fire
Control District
- Emerald Coast Utilities
Authority
- Englewood Water District
- Escambia County
- Escambia County Tax
Collector
- Fellsmere Water Control
District
- Flagler County
- Florida College System
Risk Management
- Florida Department of
Children and Family
Services
- Florida Department of
Citrus
- Florida Department of
Corrections
- Florida Department of
Education
- Florida Department of
Management Service
- Florida Division of
Emergency Management
- Florida House of
Representatives
- Florida Lottery
- Florida Prepaid College
Board
- Florida Statewide Guardian
ad Litem
- Glades County School
District
- Gulf County
- Hardee County Industrial
Development Authority
- Hardee County School
District
- Hawkstone Community
Development District
- Hendry County
- Hendry County Economic
Development Council
- Hendry County School
District
- Hernando County
- Hernando County School
Board

- Hernando County School District
- Hillsborough Area Regional Transit Authority
- Hillsborough County
- Hillsborough County Attorney's Office
- Hillsborough County Aviation Authority
- Hillsborough County Board of County Commissioners
- Hillsborough County Clerk of the Circuit
- Hillsborough County Public Schools
- Hillsborough County Sheriff's Office
- Homosassa Special Water District
- Housing Authority of City of Key West
- Housing Authority of the City of Fort Myers
- Indian River County Hospital District
- Jacksonville Transportation Authority
- Lake County Government
- Lake County School Board
- Lake County Water Authority
- Lee County Board of County Commissioners
- Lee County Metropolitan Planning Organization
- Lee County Port Authority
- Lee County Tax Collector
- Lee Memorial Health System
- Leon County
- Levy County
- Levy County School District
- Manatee County
- Marion County
- Melbourne Airport Authority
- Miami Downtown Development Authority
- Miami-Dade County
- Miami-Dade County Public Schools
- Miami-Dade Expressway Authority
- Monroe County
- Monroe County Clerk of Court
- Monroe County Tax Collector
- North Broward Hospital District
- North Sumter County Utility Dependent District
- Office of the Orange County Comptroller
- Orange County Board of Commissioners
- Orange County Library
- Orange County Property Appraiser
- Orange County Sheriff's Office
- Orlando Utilities Commission
- Osceola County Tax Collector
- Palm Beach County
- Palm Beach County Sheriff's Office
- Park East Community Development District
- Pasco County
- Pasco County Property Appraiser
- Pasco County Supervisor of Elections
- Pension Board of the City of Bartow Muni
- Pension Board of the City of Lauderhill
- Pinellas County School Board
- Pinellas Suncoast Fire and Rescue District
- Port Tampa Bay
- Santa Rosa County Property Appraiser
- Sarasota County
- School Board of Brevard County
- School Board of Broward County
- School Board of Charlotte County
- School Board of Hillsborough County
- School Board of Indian River County
- School Board of Marion County
- School District of Hillsborough County
- Seminole County
- Seminole County Property Appraiser
- Seminole County School Board
- Seminole County Supervisor of Elections
- Seminole County Tax Collector's Office
- South Bay Community Development District
- South Broward Hospital District DBA Memorial Health
- St. Johns County Schools =
- St. Lucie County
- St. Lucie County Board of County Commissioners
- St. Lucie County Clerk of Court
- State of Florida-Division of Risk Management

- | | | |
|--|--|---|
| ▪ Tampa Sports Authority | ▪ Town of Howey-in-the-Hills | ▪ Village Community Development District 10 |
| ▪ Tampa-Hillsborough County Expressway Authority | ▪ Town of Indian Shores | ▪ Village Community Development District 4 |
| ▪ The School Board of Palm Beach County | ▪ Town of Jupiter Island | ▪ Village Community Development District 6 |
| ▪ The School District of Lee County | ▪ Town of Lake Hamilton | ▪ Village Community Development District 8 |
| ▪ Toho Water Authority | ▪ Town of Montverde | ▪ Village Community Development District 9 |
| ▪ Town of Astatula | ▪ Town of Palm Beach Shores | ▪ Village of Indiantown |
| ▪ Town of Bay Harbor Islands | ▪ Town of Pembroke Park | ▪ Volusia County |
| ▪ Town of Belleair | ▪ Town of Southwest Ranches | ▪ Volusia County School Board |
| ▪ Town of Dundee | ▪ Town of Windermere | ▪ Washington County Board of County Commissioners |
| ▪ Town of Eatonville | ▪ Ventana Community Development District | |
| ▪ Town of Ft. Myers Beach | ▪ Village Community Development District 1 | |
| ▪ Town of Gulf Stream | | |

vi. Copies of billing invoices for all public sector clients for the last 12 months in accordance with public records laws.

As evidenced above, GrayRobinson represents a large number of public sector clients, and producing all billing invoices for the past 12 months would result in hundreds – potentially thousands – of documents. Our billing rates for public clients vary based on attorney experience and the nature of the matter. If the Town would like more specific information, we would be glad to provide a summary of rates and billing practices.

vii. A statement of assurance that the attorney/firm is not presently in violation of any statutes or regulatory rules that might have an impact on your firm's operations, including those of The Florida Bar Association, etc. and provide a summary of any litigation filed against the firm or key personnel in the past three years related to similar type of services requested.

GrayRobinson affirms that neither the firm nor any of its attorneys is presently in violation of any statutes, regulations, or rules that could affect our operations or professional standing. We are in full compliance with all applicable laws and regulatory requirements, including the rules and standards of The Florida Bar.

In any firm with hundreds of clients and nearly 275 attorneys and advisors throughout 16 offices, there may be an occasional dispute between the firm and a client. GrayRobinson and its attorneys have a few disputes involving matters that would be entirely irrelevant to the Town's operational and legal needs. GrayRobinson is contesting each dispute vigorously and expects to prevail on each or, in the worst case, settle on reasonable terms that will not jeopardize the firm's financial viability. The firm is also fully insured with respect to any pending claims. The GrayRobinson team is proud of its reputation for honest, ethical dealings with its clients. That is our culture, and we will be pleased to bring that culture to the table in the course of representing the Town.

- viii. **Affirmative statement, if awarded contract, confirming no conflicts of interest either directly or indirectly with any party. Alternatively, should any potential conflict exist, the proposal should specify the party with which there might be a conflict, the nature of the potential conflict, and the means proposed to resolve the conflict.**
-

GrayRobinson affirms we have no known conflicts of interest, either direct or indirect, with any party related to this engagement. We will promptly disclose should any potential conflict arise in the future and will work with all parties to develop and implement an appropriate resolution consistent with applicable rules and ethical obligations.

ix. **INSURANCE:**

1. **Describe liability insurance coverage carried. Indicate the ability to hold harmless, indemnify and defend the Town of Howey-in-the-Hills for losses, costs and expenses arising from liability claims resulting from alleged negligence.**
-

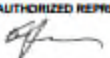
GrayRobinson maintains insurance coverage and limits, as evidenced by current certificates of coverage found on the following pages. GrayRobinson can hold harmless, indemnify, and defend the Town against losses, costs, and expenses stemming from liability claims in accordance with the terms of the contract and applicable law. We are committed to ensuring the Town is fully protected throughout our engagement.

2. **Provide evidence of coverage for workers compensation insurance.**
-

We have included our general liability certificate on the following page.

3. Provide certificate of insurance for professional and general liability with limits of at least \$2 million.

We have included both certificates on the following pages.

ACORD		GRAYROB-01		DKRANTZ		
		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 12/20/2024		
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.						
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).						
PRODUCER Hub International Florida 1560 Orange Avenue Suite 750 Winter Park, FL 32789		CONTACT NAME: PHONE (A/C, No, Ext): (407) 894-5431 FAX (A/C, No): (407) 629-6378 E-MAIL: ADDRESS:				
INSURED Gray-Robinson P.A. PO Box 3068 Orlando, FL 32802-3068		INSURER(S) AFFORDING COVERAGE		NAIC #		
		INSURER A: Endurance American Specialty Insurance Company		41718		
		INSURER B: Aspen Specialty Insurance		10717		
		INSURER C:				
		INSURER D:				
		INSURER E:				
		INSURER F:				
COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:						
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.						
INSR LTR	TYPE OF INSURANCE	ADDL INSR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY					EACH OCCURRENCE
	☐ CLAIMS-MADE ☐ OCCUR					DAMAGE TO RENTED PREMISES (Per occurrence)
						MED EXP (Any one person)
						PERSONAL & ADV INJURY
	GEN'L AGGREGATE LIMIT APPLIES PER:					GENERAL AGGREGATE
	☐ POLICY ☐ PRO-JECT ☐ LOC					PRODUCTS - COMPROP AGG
	OTHER:					
	AUTOMOBILE LIABILITY					COMBINED SINGLE LIMIT (Per accident)
	☐ ANY AUTO ☐ SCHEDULED AUTOS					BODILY INJURY (Per person)
	☐ OWNED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY					BODILY INJURY (Per accident)
	☐ HYBRID AUTOS ONLY					PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB ☐ OCCUR					EACH OCCURRENCE
	EXCESS LIAB ☐ CLAIMS-MADE					AGGREGATE
	DED ☐ RETENTION \$					
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY					PER STATUTE ☐ OTH-ER ☐
	ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER/EMPLOYEE EXCLUDED? (Mandatory in FL)	Y/N ☐ N/A				E.L. EACH ACCIDENT
	If yes, describe under DESCRIPTION OF OPERATIONS below					E.L. DISEASE - EA EMPLOYEE
						E.L. DISEASE - POLICY LIMIT
A	Prof Liab/\$750k SIR		LPW30014259903	12/21/2024	12/21/2025	Claim & Aggr.
B	Excess Prof. Liab.		LX00EYG24	12/21/2024	12/21/2025	Claim & Aggr.
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Lawyers Professional Liability Layered Program: SIR: \$750,000 Primary \$10,000,000 Layer: Endurance American Specialty Ins., 12/21/24-25, NAICS #41718, Policy #LPW30014259903 Landmark American Ins. Co., 12/21/24-25, NAICS #33138, Policy # LQS863178 Evanston Ins. Co., 12/21/24-25, NAICS #35378, Policy # MKLV7PL0006691 MSIG Specialty Ins. USA, 12/21/24-25, NAICS #34886, Policy #MSTLPL-00240 SEE ATTACHED ACORD 101						
CERTIFICATE HOLDER				CANCELLATION		
For Information Only - Orlando 301 East Pine St., Ste. 1400 Orlando, FL 32801				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.		
				AUTHORIZED REPRESENTATIVE 		

ACORD 25 (2016/03)

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AGENCY CUSTOMER ID: GRAYROB-01

DKRANTZ

LOC #:

ADDITIONAL REMARKS SCHEDULE

Page 1 of 1

AGENCY Hub International Florida		NAMED INSURED Gray-Robinson P.A. PO Box 3068 Orlando, FL 32802-3068	
POLICY NUMBER SEE PAGE 1			
CARRIER SEE PAGE 1	NAIC CODE SEE P 1	EFFECTIVE DATE: SEE PAGE 1	

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance

Description of Operations/Locations/Vehicles:

\$10M xs \$10M Layer:

Aspen Specialty Insurance, 12/21/24-25, NAICS #10717, Policy # LX00EYGG24
Ironshore Specialty Co., 12/21/24-25, NAICS #25445, Policy # LPL7NABW7BB006

\$5M xs \$20M Layer:

Landmark American Ins. Co., 12/21/24-25, NAICS #33138, Policy # LQS854404
Fireman's Fund Indemnity Corp., 12/21/24-25, NAICS #11380, Policy # U5F00537424

\$5M xs \$25M Layer:

Endurance American Specialty Ins., 12/21/24-25, NAICS #41718, Policy #LXT30014340403
Evanston Ins. Co., 12/21/24-25, NAICS #35378, Policy # MKLV7PL0006692

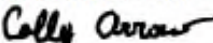
\$10M xs \$30M Layer:

QBE Insurance Company, 12/21/24-25, NAICS #39217, Policy #100043603
Great American Ins. Co., 12/21/24-25, NAICS #16691, Policy #LAXE558802

\$5M xs \$40M Layer:

SiriusPoint Specialty Ins. Corp., 12/21/24-25, NAICS #16820, Policy #PROVXS-0000107-00

For Information Only

Client#: 1405411		131GRAYOB		DATE (MM/DD/YYYY) 4/15/2025																	
ACORD₂₅ CERTIFICATE OF LIABILITY INSURANCE																					
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PRODUCER McGriff, a MMA LLC Company 333 S. Garland Ave Orlando, FL 32801-4927 407 691-9600			CONTACT NAME: Casey Guzinski PHONE (A/C, No, Ext): 407 691-9600 FAX (A/C, No): 888-635-4183 E-MAIL ADDRESS: Casey.Guzinski@mcgriff.com																		
INSURED GrayRobinson PA PO Box 3068 Orlando, FL 32802-3068			<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th><th style="text-align: left;">NAIC #</th></tr></thead><tbody><tr><td>INSURER A: Chubb National Insurance Company</td><td>10052</td></tr><tr><td>INSURER B: Federal Insurance Company</td><td>20281</td></tr><tr><td>INSURER C: Travelers Indemnity Co of America</td><td>25666</td></tr><tr><td>INSURER D: Great Northern Insurance Company</td><td>20303</td></tr><tr><td>INSURER E:</td><td></td></tr><tr><td>INSURER F:</td><td></td></tr></tbody></table>			INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Chubb National Insurance Company	10052	INSURER B: Federal Insurance Company	20281	INSURER C: Travelers Indemnity Co of America	25666	INSURER D: Great Northern Insurance Company	20303	INSURER E:		INSURER F:			
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INSR LTR	TYPE OF INSURANCE	ADDITIONAL INSR	SUBROG NYO	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS														
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR ☐ GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC ☐ OTHER	X	X	D02931412	04/15/2025	04/15/2025	<table border="1" style="width: 100%; border-collapse: collapse;"><tr><td>EACH OCCURRENCE</td><td style="text-align: right;">\$1,000,000</td></tr><tr><td>DAMAGE TO RENTED PREMISES (Per occurrence)</td><td style="text-align: right;">\$1,000,000</td></tr><tr><td>MED EXP (Any one person)</td><td style="text-align: right;">\$15,000</td></tr><tr><td>PERSONAL & ADV INJURY</td><td style="text-align: right;">\$1,000,000</td></tr><tr><td>GENERAL AGGREGATE</td><td style="text-align: right;">\$2,000,000</td></tr><tr><td>PRODUCTS - COMPROP AGG</td><td style="text-align: right;">\$2,000,000</td></tr><tr><td></td><td style="text-align: right;">\$</td></tr></table>	EACH OCCURRENCE	\$1,000,000	DAMAGE TO RENTED PREMISES (Per occurrence)	\$1,000,000	MED EXP (Any one person)	\$15,000	PERSONAL & ADV INJURY	\$1,000,000	GENERAL AGGREGATE	\$2,000,000	PRODUCTS - COMPROP AGG	\$2,000,000		\$
EACH OCCURRENCE	\$1,000,000																				
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GENERAL AGGREGATE	\$2,000,000																				
PRODUCTS - COMPROP AGG	\$2,000,000																				
	\$																				
D	☐ ANY AUTO ☐ OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY	X	X	73650759	04/15/2025	04/15/2025	<table border="1" style="width: 100%; border-collapse: collapse;"><tr><td>COMBINED SINGLE LIMIT (Per accident)</td><td style="text-align: right;">\$1,000,000</td></tr><tr><td>BODILY INJURY (Per person)</td><td style="text-align: right;">\$</td></tr><tr><td>BODILY INJURY (Per accident)</td><td style="text-align: right;">\$</td></tr><tr><td>PROPERTY DAMAGE (Per accident)</td><td style="text-align: right;">\$</td></tr><tr><td></td><td style="text-align: right;">\$</td></tr></table>	COMBINED SINGLE LIMIT (Per accident)	\$1,000,000	BODILY INJURY (Per person)	\$	BODILY INJURY (Per accident)	\$	PROPERTY DAMAGE (Per accident)	\$		\$				
COMBINED SINGLE LIMIT (Per accident)	\$1,000,000																				
BODILY INJURY (Per person)	\$																				
BODILY INJURY (Per accident)	\$																				
PROPERTY DAMAGE (Per accident)	\$																				
	\$																				
B	☒ UMBRELLA LIAB ☐ EXCESS LIAB ☐ RETENTION \$10,000	X	X	56728656	04/15/2025	04/15/2025	<table border="1" style="width: 100%; border-collapse: collapse;"><tr><td>EACH OCCURRENCE</td><td style="text-align: right;">\$15,000,000</td></tr><tr><td>AGGREGATE</td><td style="text-align: right;">\$15,000,000</td></tr><tr><td></td><td style="text-align: right;">\$</td></tr></table>	EACH OCCURRENCE	\$15,000,000	AGGREGATE	\$15,000,000		\$								
EACH OCCURRENCE	\$15,000,000																				
AGGREGATE	\$15,000,000																				
	\$																				
C	☒ WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N N / A	X	UB1R6308612442E	08/09/2024	08/09/2025	<table border="1" style="width: 100%; border-collapse: collapse;"><tr><td>☒ PER STATUTE</td><td>☐ OTH-ER</td></tr><tr><td>E.L. EACH ACCIDENT</td><td style="text-align: right;">\$1,000,000</td></tr><tr><td>E.L. DISEASE - EA EMPLOYEE</td><td style="text-align: right;">\$1,000,000</td></tr><tr><td>E.L. DISEASE - POLICY LIMIT</td><td style="text-align: right;">\$1,000,000</td></tr></table>	☒ PER STATUTE	☐ OTH-ER	E.L. EACH ACCIDENT	\$1,000,000	E.L. DISEASE - EA EMPLOYEE	\$1,000,000	E.L. DISEASE - POLICY LIMIT	\$1,000,000						
☒ PER STATUTE	☐ OTH-ER																				
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E.L. DISEASE - EA EMPLOYEE	\$1,000,000																				
E.L. DISEASE - POLICY LIMIT	\$1,000,000																				
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) ***General Liability*** Additional Insured status, along with Primary & Non-Contributory, is granted if required by written contract per "Commercial General Liability Enhancement Endorsement" CBCG040001. Waiver of Subrogation status is granted if required by written contract per "Commercial General Liability Endorsement" CBCG040001. *** Auto Liability *** Additional Insured status and Waiver of Subrogation is granted if required by written (See Attached Descriptions)																					
CERTIFICATE HOLDER				CANCELLATION																	
GrayRobinson PA P.O. Box 3068 Orlando, FL 32802				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 																	

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ACORD 25 (2016/03) 1 of 2 The ACORD name and logo are registered marks of ACORD
#S37078113/M37077694

LUPE

DESCRIPTIONS (Continued from Page 1)	
contract per "Commerical Automobile Broad Form Endorsement" 16020292. *** Workers Compensation *** Waiver of Subrogation status is granted if required by written contract per "Waiver of Our Rights to Recover from Others Endorsement" form WC000313. *** Umbrella *** Umbrella is Follow Form providing excess liability over General Liability, Auto Liability and Employer's Liability limits shown.	

F. FORMS

All signed forms are included on the pages following.

Statement on Public Entity Crimes and Drug-Free Work Place.**SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a), *FLORIDA STATUTES*, ON PUBLIC ENTITY CRIMES**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the TOWN OF HOWEY-IN-THE-HILLS, FLORIDA

by: Heather Ramos, Orlando Managing Shareholder
(print individual's name and title)

for: GrayRobinson, P.A.
(print name of entity submitting sworn statement)

whose business address is: 301 East Pine Street, Suite 1400, Orlando, Florida 32801
and (if applicable) its Federal Employer Identification Number (FEIN) is: 59-1300132
(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: - N/A -)

I understand that a "public entity crime" as defined in Paragraph 287.133 (1)(g), *Florida Statutes*, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentations.

I understand that "convicted" or "conviction" as defined in Section 287.133 (1)(b), *Florida Statutes*, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or non contendere.

I understand that an "affiliate" as defined in Section 287.133(1)(a), *Florida Statutes*, means:

- a. A predecessor or successor of a person convicted of a public entity crime; or
- b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an

SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a), *FLORIDA STATUTES*, ON PUBLIC ENTITY CRIMES

arm's length agreement shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

I understand that a "person" as defined in Section 287.133(1)(e), *Florida Statutes*, means any natural person or entity organized under the laws of any state or of the United States with legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, and partners. Shareholders, employees, members, and agents who are active in management of an entity.

Based on information and belief, the statement, which I have marked below, is true in relations to the entity submitting this sworn statement. (Indicate which statement applies). Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list (attach a copy of the final order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, *FLORIDA STATUTES*, FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

**SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a), FLORIDA
 STATUTES, ON PUBLIC ENTITY CRIMES**

Signature

STATE OF Florida

COUNTY OF Orange

The foregoing instrument was sworn to and subscribed before me this 21 day
 of July, 2025 by Heather Ramos

who is personally known to me or produced as identification:

Orlando Managing Shareholder

NOTARY PUBLIC

State of Florida

Print Name: Bethany Dunn

Council No.: _____

Council Expires: _____



TOWN OF HOWEY-IN-THE-HILLS

DRUG-FREE WORKPLACE COMPLIANCE FORM

Preference shall be given to businesses with drug-free workplace programs. Whenever two or more proposals, 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. In order to have a drug-free workplace program, a business shall:

(The undersigned vendor in accordance with Section 287.087, Florida Statutes, hereby

certifies that GrayRobinson, P.A. does): (Name of Business)

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, *Florida Statutes*, or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than 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.

TOWN OF HOWEY-IN-THE-HILLS
DRUG-FREE WORKPLACE COMPLIANCE FORM

As the person authorized to sign the statement, I certify that this form complies fully with the above requirements.

Signature

STATE OF Florida

COUNTY OF Orange

The foregoing instrument was sworn to and subscribed before me this 21 day
 of July, 2025 by Heather Ramos

who is personally known to me or produced as identification:

Orlando Managing Shareholder

NOTARY PUBLIC

State of

Florida

Print Name:

Bethany Dunn

Council No.:

Council Expires:



G. ADDITIONAL INFORMATION

Any additional information that would be helpful to the Town of Howey-in-the-Hills in evaluating qualifications to serve as Town Attorney.

At GrayRobinson, we believe the value we provide to clients extends well beyond day-to-day legal representation. We are committed to fostering meaningful connections, sharing knowledge, and creating opportunities for our clients to stay informed, engaged, and positioned for success. Through training programs, thought leadership, and access to influential networks, we ensure our clients are equipped not only with strong legal guidance but also with the insights and relationships that help drive their business forward.

TRAINING

GrayRobinson regularly provides training sessions for our clients' in-house counsel departments, executive leadership, management, and/or employees at no cost. GrayRobinson attorneys frequently offer Continuing Legal Education (CLE) and training programs on topics of interest via live seminars or virtually by webinar.

CONNECTIONS WITH ELECTED OFFICIALS, INFLUENTIAL POLITICAL LEADERS, AND LAWMAKERS

Our Government Affairs and Lobbying Team strives to provide clients across the firm with the immense benefit of their relationships with members of Florida's Delegations, state leadership in Tallahassee, and federal connections in Washington, D.C., to address specific matters of state and federal interest.

LEVERAGING COMMUNITY LEADER FORUMS

GrayRobinson hosts internal seminars and Community Leader Forums throughout our Florida markets. We bring together clients, attorneys, lobbyists, political leaders, and friends of the firm to hear high-profile business leaders, community leaders, and elected officials discuss issues of importance to business and the State of Florida. We also use these opportunities to introduce our clients to influential lawmakers and political leaders and to promote our clients' new ventures or projects of interest to the local community.

INSIGHTS AND UPDATES

GrayRobinson professionals regularly publish and distribute electronic updates and insights on new case decisions, regulatory issues, and changing legislation that is timely and specific to our clients' industries, locations, and/or business interests.

H. AVAILABILITY

Indicate current and anticipated workloads and availability for other activities. Identify the extent and nature of any anticipated outside support.

GrayRobinson commits to continue meeting time requirements set by the Town of Howey-in-the-Hills, and Team Lead Heather Ramos commits to continuing to attend monthly commission meetings. Heather will oversee all matters and ensure the Town is given proper attention and effort and is satisfied with the results. With the resources available to us at a firm of nearly 275 professionals, the team has the capacity and tools available to manage multiple projects. It is the nature of our work, and we meet and exceed all client expectations in this regard.

To ensure the Town's work is completed efficiently and promptly, from time to time, management of particular projects may be delegated to a team member. As evidenced throughout the proposal, both additional team members are experienced individuals fully capable of addressing all issues that may arise. However, oversight of, and accountability for, the Town's work will continue to rest with Heather.



Town Manager Performance Evaluation

Town Manager's Name: Sean O'Keefe

Council Member Name: _____

Evaluation Period: April 1, 2025 to September 30, 2025

Evaluation Date: October 7, 2025

Evaluation Instructions:

This form shall be completed by each member of the Council to evaluate the Town Manager's performance in each of the areas noted below. Each member of the Board shall sign the end of the form and forward it to the Town Clerk. Performance levels can be based on the following scale:

- 5 – EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 – SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrates no appreciable performance deficiencies.
- 3 – SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 – FAIR:** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 – UNSATISFACTORY:** The incumbent frequently fails to meet minimum performance expectations.

Timeline: April 1, 2025 through September 30, 2025

Town Manager Performance Evaluation

Performance Dimensions:

1. Professional Skills and Expertise		Rating:
a. Is knowledgeable of current developments affecting the management field and affecting local governments.		4
b. Regularly provides accurate, comprehensive reports concerning matters of importance to the organization.		3
c. Anticipates problems and develops effective approaches for solving them.		4
d. Offers workable alternatives when changes in the law render the administration of an ordinance or policy impractical.		4
e. Sets a professional example by handling the affairs of the organization in a fair and impartial manner.		5
Total Rating for this Performance Dimension:		20
Comment:	During this evaluation period, I have worked to ensure that the Council and community are informed and supported by accurate information, professional judgment, and practical alternatives. My efforts have centered on managing complex infrastructure and utility planning issues, including the Citrus Avenue right-of-way agreements, development utility agreements, and major revisions to the Capital Improvement Plan. Each of these required a clear understanding of technical, fiscal, and legal considerations, as well as an ability to translate those issues into actionable options for Council. I have also focused on enhancing policy clarity, including revisions to the purchasing policy, and providing context on long-term service delivery challenges such as wastewater capacity expansion. These efforts reflect both responsiveness to Council direction and a proactive approach to anticipating emerging needs. In doing so, I have worked to uphold the highest professional standards, presenting complex issues in a way that supports effective decision-making and public trust. While there will always be opportunities to further improve the accessibility of financial and technical information, I believe this period demonstrates continued progress in professional expertise, strategic foresight, and commitment to fairness. I remain dedicated to modeling the professionalism and impartiality expected of the Town Manager role while preparing the organization to meet the demands of future growth.	

Town Manager Performance Evaluation

2. Council/Commission Relations		Rating:
a. Carries out directives of the Board as a whole rather than those of any one Boardmember.		5
b. In responding to requests for information, provides complete, accurate, and timely information equally to all Board members.		3
c. Assists the Board by resolving problems at the administrative level to avoid unnecessary Board action.		4
d. Assists the Board in establishing policy while acknowledging the ultimate authority of the Board.		5
e. Is willing to try new ideas proposed by Board members.		4
Total Rating for this Performance Dimension:		21
Comment:	Throughout this evaluation period, I have maintained a consistent focus on respecting the authority of the Council, making myself fully available for conversations and meetings to discuss topics, while ensuring its directives are carried out. In matters such as the Drake Point utility agreement and the Citrus Avenue right-of-way negotiations, I presented the facts, clarified legal and technical distinctions, and deferred to Council's collective decision-making, ensuring that staff actions reflected consensus rather than individual preferences. In support of Council's policymaking role, I worked to bring forward revisions to the purchasing policy and the Capital Improvement Plan, clarifying details at Council's request while recognizing that ultimate authority rests with the elected body. My approach has been to frame options and implications clearly so that Council can make informed choices. This approach was particularly evident during discussions of financial reporting practices, where I provided context and adjustments in line with Council feedback. I also sought to manage matters administratively whenever possible to reduce the need for escalated Council involvement. At the same time, I have sought Council's ideas and feedback, incorporating their recommendations into policy revisions and long-term planning. Even in cases where perspectives varied, I worked to foster respectful dialogue and to ensure that decisions were implemented without bias. Taken together, these efforts reflect my commitment to building a collaborative relationship with the Council. By focusing on accuracy and	

Town Manager Performance Evaluation

	fairness, I believe I have done my part to strengthen the decision-making environment and have reinforced confidence in the Town's administrative leadership. Despite my efforts to maintain professional relations, Council as a body has tolerated, and at times encouraged, individual members interfering outside their Charter authority. Independent calls to the Town Attorney, undisclosed meetings with department directors, direct instructions to contractors, and public disparagement of the Town Manager have become normalized. These actions undermine collective governance, erode staff confidence, and damage the credibility of the organization.	
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Town Manager Performance Evaluation

3. Citizen and Public Relations		Rating:
a. Effectively conveys to the public that the organization delivers services in a cost-effective manner without sacrificing quality and customer focus.		3
b. Is willing to meet with members of the community and is responsive to their concerns.		4
c. Demonstrates a dedication to service to the community and its citizens.		5
d. Expresses information orally in a clear and concise manner when making public presentations.		4
e. Is skillful with the news media, proactively providing information that is important to the public.		3
Total Rating for this Performance Dimension:		19
Comment:	During this period, I worked to ensure that residents were informed, heard, and supported through transparent communication and accessibility. Whether addressing concerns about utility projects, explaining financial practices, or clarifying policy revisions, I have made it a priority to provide residents with clear and accurate information. This has been particularly important in infrastructure planning, where I sought to reassure residents that projects like road reconstructions and utility infrastructure projects were designed with safety, efficiency, and long-term community benefit in mind. Community events such as the Founders Day celebration also highlighted the need for responsiveness and inclusivity. While some residents expressed concerns about competing events, I worked to explain the Town's sponsorship and planning process and supported collaboration with other organizations. These interactions reinforced both the opportunities and the challenges in managing public expectations during a milestone year for the Town. I have also continued to be present and approachable in daily interactions with residents. This has included engaging in dialogue during Council meetings, participating in community activities, and addressing resident inquiries directly. These efforts reflect my ongoing commitment to service as more than administrative management, while building public trust and showing residents that their concerns matter. While there remains room to expand proactive communication strategies, especially with the news media and in digital outreach, I believe this	

Town Manager Performance Evaluation

	evaluation period demonstrates steady progress in making government operations more transparent and accessible. During the recent budgeting season, Council members have actively spread inaccurate information to residents, such as misrepresenting staff raises, resulting in public hostility toward Town staff. This has created an atmosphere where residents question staff integrity, when, in fact, staff have operated transparently within budget and procurement rules. Staff time and energy are then diverted from service delivery to correcting misleading narratives, which undermines resident confidence.	
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4. Policy Execution		Rating:
a. Understands, supports, and enforces the organization's ordinances, policies, and procedures.		5
b. Clearly identifies and communicates expectations to the organization regarding the implementation of policies enacted by the Board.		4
c. Implements Board actions in accordance with the intent of the Board.		4
d. Supports the actions of the Board after a decision has been reached, both inside and outside the organization.		4
e. Helps internal and external stakeholders to achieve common objectives within the parameters of established Board policies.		4
Total Rating for this Performance Dimension:		21
Comment:	Over this period, I have worked to ensure that Council directives are carried out with accuracy, clarity, and consistency. One example is the revision of the purchasing policy, where I presented changes designed to improve transparency and efficiency while responding to Council's concerns about fiscal oversight. The process underscored the importance of aligning staff practices with Council expectations, and I believe the final outcome reflected both accountability and operational effectiveness. In managing the Capital Improvement Plan amendment, I provided Council with the necessary updates, options, and implications for sequencing projects and funding sources. These discussions required balancing ambitious infrastructure goals with fiscal realities, while also ensuring that the Town remained in compliance with statutory planning requirements. By presenting these issues in a clear and practical way, we have set ourselves up for future success.	

Town Manager Performance Evaluation

	I also worked to faithfully execute Council's policy direction in development and utility matters. Negotiations around the Citrus Avenue right-of-way and utility agreements required detailed coordination with property owners and developers, and my role was to ensure that agreements reflected the Council's intent while protecting the Town's long-term interests. More broadly, I have maintained a consistent commitment to supporting Council's decisions once made, regardless of prior debate. By clearly communicating expectations to staff, guiding external stakeholders, and emphasizing the Council's authority, I have helped translate policy into practice. This has strengthened organizational alignment and ensured that residents and partners see the Town follow through on its commitments. At times, council members have pressed staff to advance projects without legal authority or outside of procurement rules. I have resisted such pressure to protect the Town from costly exposure. When staff are criticized for following policy and procurement rules, it signals that compliance is not valued, which demoralizes employees who take pride in professional standards.	
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Town Manager Performance Evaluation

5. Intergovernmental Relations		Rating:
a. Promotes a positive working relationship with other governmental entities.		5
b. Engages with other local, regional, state, and federal agencies to accomplish local initiatives.		4
c. Positively and effectively represents the organization and its interests when working with other governmental agencies.		5
d. Maintains awareness of laws and other issues affecting other governmental agencies which may affect the organization.		4
e. Is willing to share resources or information with other governmental agencies as appropriate.		4
Total Rating for this Performance Dimension:		22
Comment:	During this evaluation period, I have continued to foster constructive relationships with other governmental entities to advance the Town's priorities. As one example, Lake County Fire Rescue's leadership now provides regular reporting and analysis to the Town, and their active involvement in Founders Day and emergency preparedness planning reflects the strong partnerships we have built and maintained. Intergovernmental engagement has also been critical in utility and infrastructure matters. The Town is strengthening its ability to provide utility services, and this requires coordination with Lake County in new ways. New requirements from St. Johns River Water Management District have brought us closer in cooperation with other municipalities to pursue shared alternate water source solutions. Likewise, planned growth has led to new challenges in traffic management and right-of-way issues, involving close cooperation with FDOT and Lake County. Overall, my efforts in this area have ensured that the Town is well represented in regional conversations and that its interests are protected when negotiating with larger entities. While there is always more work to do in pursuing shared service models and long-term funding partnerships, this period reflects steady progress in positioning Howey-in-the-Hills as a respected and engaged partner at the county and regional level. These partnerships have preserved the Town's credibility, ensuring that regional partners continue to view the Town as stable and reliable, even when internal dynamics present challenges.	

Town Manager Performance Evaluation

6. Staffing and Management		Rating:
a. Recruits and retains competent personnel for Town positions.		5
b. Is aware of staff weaknesses and works to improve their performance.		4
c. Promotes training and development opportunities for employees at all levels of the organization.		4
d. Stays accurately informed and concerned about employee relations.		4
e. Is able to discern when it is necessary to assume charge of situations that would normally be handled by a subordinate and when it is necessary to only provide guidance and support.		4
Total Rating for this Performance Dimension:		21
Comment:	Over the course of this evaluation period, departmental roles have remained well staffed, and I have continued to prioritize employee development through opportunities for professional growth and cross-departmental collaboration. These investments not only improve service delivery but also foster a culture of accountability and teamwork across the organization. I have also focused on ensuring staff work is aligned with Council's expectations. In financial reporting, for example, I have worked with the Finance Supervisor to revise presentation formats so that departmental costs and revenues are easier for both Council and the public to understand. At the same time, I recognize that employee relations and communication can always be strengthened. I have worked to stay informed about staff concerns and to provide guidance where needed, stepping in directly when sensitive issues required my involvement but otherwise empowering department heads to manage their teams effectively, based on the principle of subsidiarity. There is a saying that "the highest reward for a person's toil is not what they get for it, but what they become by it." Ideally, Town service should foster pride and professional growth. Unfortunately, under the current conditions, what our staff are becoming is demoralized, due to the cumulative effects of interference and public criticism. Their achievements during this period must be recognized as hard-won successes in the face of adverse conditions.	

Town Manager Performance Evaluation

7. Fiscal Management		Rating:
a. Prepares a balanced budget to provide services at a level directed by the Board.		5
b. Ensures that the budget meets the operational needs of the organization and makes the best possible use of available funds.		4
c. Prepares the budget in an intelligent but readable format.		5
d. Submits the proposed budget in a timely manner that allows for an appropriate review period.		4
e. Appropriately monitors and manages the fiscal activities of the organization throughout the fiscal year.		4
Total Rating for this Performance Dimension:		22
Comment:	During this evaluation period, I prepared and presented the FY26 budget, ensuring that it was balanced, fiscally responsible, and aligned with the policy direction established by Council. The process required reconciling ambitious infrastructure priorities with the Town's limited fiscal capacity, while also meeting ongoing operational needs. By presenting both immediate requirements and long-term considerations, I aimed to provide Council with the tools necessary to make informed budgetary decisions. In response to Council feedback, I also worked to refine financial reporting and presentation formats. Substantial adjustments were made to improve readability and to make departmental costs and revenues clearer to both Council and the public. While these refinements are ongoing, the goal has been to ensure that financial information is not only technically accurate but also accessible, thereby supporting transparency and accountability. Overall, I believe this period demonstrates continued progress in balancing stewardship of Town resources with responsiveness to Council's expectations. While further improvements in comparative reporting and public communication of fiscal data remain priorities, the Town is well positioned for both stability and growth through the sound financial practices developed during this period.	

8. Planning and Organizational Development	Rating:
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Town Manager Performance Evaluation

a. Works with the Board, community leaders, and other stakeholders to develop a clear vision, mission, values, and objectives for the organization.		4
b. Effectively prioritizes goals and objectives in order to ensure that the organization is doing "first things first" in support of its strategic plan.		4
c. Maintains a healthy and productive organizational culture focused on customer service and responsible stewardship of the organization's resources.		4
d. Has a capacity for and encourages innovation.		4
e. Reviews ordinances, policies, and procedures periodically to suggest improvements.		4
Total Rating for this Performance Dimension:		20
Comment:	This period has required balancing immediate operational demands with the Town's longer-term planning and development needs. Through updates to the Capital Improvement Plan, I provided Council with a framework to prioritize projects in alignment with strategic goals, available funding, and fiscal obligations. These discussions, particularly around wastewater capacity expansion, underscored the importance of forward-looking planning to ensure that the Town remains well-positioned to meet future growth demands. Organizationally, I have continued to focus on building a culture that values accountability, collaboration, and customer service. By empowering staff to take ownership of their roles while providing guidance and support, I have sought to maintain a productive environment that emphasizes efficiency while allowing space for creativity. I have also worked to identify opportunities for innovation and procedural improvements. Revisions to the purchasing policy and refinements to financial reporting are examples of how policy adjustments can strengthen organizational effectiveness while providing clearer accountability to Council and the public. These changes, while incremental, reflect an ongoing commitment to continuous improvement and responsible stewardship. Taken together, the planning and organizational development efforts during this period have reinforced the Town's long-term priorities while also strengthening internal practices. Continued attention to cross-functional communication and proactive planning will ensure that the organization remains aligned with Council's vision and responsive to community needs.	

Town Manager Performance Evaluation

9. Leadership and Decision-Making		Rating:
a. Leads the organization by example in adhering to its established policies, rules, and procedures, and ensures that subordinates do the same.		4
b. Acknowledges the efforts of others and gives appropriate credit for their accomplishments.		4
c. Is effective at building consensus among stakeholders on new or unpopular policies or initiatives.		4
d. Makes logical decisions based on a thorough review of available information and soliciting input from appropriate sources.		4
e. Is able to effectively make decisions rapidly in situations where information is limited, and the outcome might be uncertain.		4
Total Rating for this Performance Dimension:		20
Comment:	This period has highlighted the importance of steady, principled leadership in managing the Town's priorities. I have led by example, ensuring that policies and procedures are consistently followed, and that staff and stakeholders can rely on an administration grounded in professionalism and fairness. Transparency in decision-making has been central, particularly in budget preparation and infrastructure planning. I have also worked to build consensus on matters that at times presented differing perspectives. Negotiations around utility expansion, for example, require balancing community impact with infrastructure needs, and my role is to provide options grounded in facts while respecting Council's authority to make the final determination. In these and other instances, I seek to provide logical recommendations without overstepping into policymaking. As always, my goal is to support stability, uphold accountability, and keep the organization moving forward in alignment with Council's vision. During this period, I addressed a significant policy interpretation issue regarding remote work. I discussed with councilors a transparent plan to work remotely for a period while maintaining availability and tracking time accurately. When legal guidance suggested that I must use leave to cover all my time despite actively performing my duties, I maintained a lawful, practical approach that upheld both performance expectations and employee rights. This situation demonstrated leadership under pressure and reinforced the need for governance practices and legal counsel that are both risk-aware and also grounded in practical, modern governance. At the end of this period, the retirement of the Police Chief required decisive leadership to ensure continuity and integrity in the department. Rather than defaulting to past Town practice of internal promotion with little to no	

Town Manager Performance Evaluation

	advertisement, I implemented best practices: publicly posting the position state-wide and inviting a panel of local police chiefs to participate in interviews. This approach strengthened legitimacy and transparency compared to prior methods. As is typical in finding a new police chief, the process has not been without controversy, and strong views from former leadership and competing loyalties within the department have fueled misinformation and attempts to discredit the process. Despite this, I kept the focus on fairness, outside review, and organizational stability. While I anticipate some passionate discussion in securing Council confirmation of the new Chief, I remain confident the process was more rigorous and transparent than past practice, demonstrating leadership under pressure and commitment to the integrity of Town decision-making.	
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10. Individual Characteristics		Rating:
a. Consistently acts with professionalism and courtesy, including prompt attendance at meetings, returning phone calls/messages, and adhering to scheduled appointments.		3
b. Ensures that all business conducted by the organization is free of conflicts of interest or practices that might be construed as illegal, unethical, or unprofessional.		5
c. Is energetic, cooperative, and willing to spend whatever time is necessary to do a good job.		4
d. Has the capacity to listen to others and to recognize their interests.		4
e. Avoids political positions, partisanship, and unnecessary controversy.		4
Total Rating for this Performance Dimension:		20
Comment:	In my role as Town Manager, I have placed a consistent emphasis on professionalism, courtesy, and reliability. During this evaluation period, I ensured that Council meetings, budget presentations, and policy discussions were conducted in a manner that respected both the Council's authority and the public's trust. I have also taken deliberate steps to uphold the ethical standards of the organization. Decisions on purchasing policies, utility agreements, capital projects, and the budget in general were made transparently and within the framework of state law and the Town Charter. By consistently applying these standards, I have sought to protect the Town from even the appearance of impropriety and to reinforce confidence in the integrity of its administration.	

Town Manager Performance Evaluation

	The work has required significant time and energy, particularly during budget preparation and in coordinating across departments for projects and events. I have committed the necessary effort to ensure that these tasks were completed with care, while also recognizing and respecting the perspectives of Council members, staff, and residents. My approach has been to listen carefully, respond thoughtfully, and balance differing interests to reach outcomes consistent with policy and community needs.
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	Finally, I have remained committed to avoiding partisanship and unnecessary controversy. Even in challenging discussions, I worked to keep deliberations focused on policy, facts, and the best interests of the Town. By doing so, I believe I have done my part to contribute to an environment that is stable, respectful, and capable of supporting the Council's vision for the community.
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Town Manager Performance Evaluation

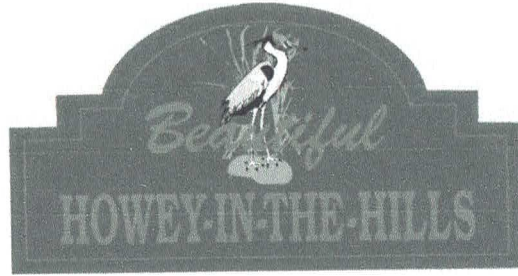
Summary:

Performance Dimension:	Overall Rating:	
1. Professional Skills and Expertise		20
2. Council/Commission Relations		21
3. Citizen and Public Relations		19
4. Policy Execution		21
5. Intergovernmental Relations		22
6. Staffing and Management		21
7. Fiscal Management		22
8. Planning and Organizational Development		20
9. Leadership and Decision-Making		20
10. Individual Characteristics		20

Total Score: 206

Total Average Rating: 4.12

Date: 10/7/2025



Town Manager Performance Evaluation

Town Manager's Name: Sean O'Keefe

Council Member Name: _____

Evaluation Period: April 1, 2025 to September 30, 2025

Evaluation Date: _____

Evaluation Instructions:

This form shall be completed by each member of the Council to evaluate the Town Manager's performance in each of the areas noted below. Each member of the Board shall sign the end of the form and forward it to the Town Attorney. Performance levels can be based on the following scale:

- 5 – EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 – SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrates no appreciable performance deficiencies.
- 3 – SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 – FAIR:** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 – UNSATISFACTORY:** The incumbent frequently fails to meet minimum performance expectations.

Timeline: April 1, 2025 through September 30, 2025

Town Manager Performance Evaluation

Performance Dimensions:

1. Professional Skills and Expertise		Rating:
a. Is knowledgeable of current developments affecting the management field and affecting local governments.		2
b. Regularly provides accurate, comprehensive reports concerning matters of importance to the organization.		2
c. Anticipates problems and develops effective approaches for solving them.		1
d. Offers workable alternatives when changes in the law render the administration of an ordinance or policy impractical.		2
e. Sets a professional example by handling the affairs of the organization in a fair and impartial manner.		1
Total Rating for this Performance Dimension:		
Comment:		

2. Council/Commission Relations		Rating:
a. Carries out directives of the Board as a whole rather than those of any one Boardmember.		2
b. In responding the requests for information, provides complete, accurate, and timely information equally to all Board members.		2
c. Assists the Board by resolving problems at the administrative level to avoid unnecessary Board action.		2
d. Assists the Board in establishing policy while acknowledging the ultimate authority of the Board.		1
e. Is willing to try new ideas proposed by Board members.		3
Total Rating for this Performance Dimension:		
Comment:		

Town Manager Performance Evaluation

3. Citizen and Public Relations		Rating:
a. Effectively conveys to the public that the organization delivers services in a cost-effective manner without sacrificing quality and customer focus.		1
b. Is willing to meet with members of the community and is responsive to their concerns.		1
c. Demonstrates a dedication to service to the community and its citizens.		1
d. Expresses information orally in a clear and concise manner when making public presentations.		2
e. Is skillful with the news media, proactively providing information that is important to the public.		1
Total Rating for this Performance Dimension:		
Comment:		

4. Policy Execution		Rating:
a. Understands, supports, and enforces the organization's ordinances, policies, and procedures.		3
b. Clearly identifies and communicates expectations to the organization regarding the implementation of policies enacted by the Board.		3
c. Implements Board actions in accordance with the intent of the Board.		2
d. Supports the actions of the Board after a decision has been reached, both inside and outside the organization.		1
e. Helps internal and external stakeholders to achieve common objectives within the parameters of established Board policies.		2
Total Rating for this Performance Dimension:		
Comment:		

Town Manager Performance Evaluation

5. Intergovernmental Relations		Rating:
a. Promotes a positive working relationship with other governmental entities.		2
b. Engages with other local, regional, state, and federal agencies to accomplish local initiatives.		2
c. Positively and effectively represents the organization and its interests when working with other governmental agencies.		1
d. Maintains awareness of laws and other issues affecting other governmental agencies which may affect the organization.		1
e. Is willing to share resources or information with other governmental agencies as appropriate.		3
Total Rating for this Performance Dimension:		
Comment:		

6. Staffing and Management		Rating:
a. Recruits and retains competent personnel for Town positions.		3
b. Is aware of staff weaknesses and works to improve their performance.		1
c. Promotes training and development opportunities for employees at all levels of the organization.		3
d. Stays accurately informed and concerned about employee relations.		3
e. Is able to discern when it is necessary to assume charge of situations that would normally be handled by a subordinate and when it is necessary to only provide guidance and support.		2
Total Rating for this Performance Dimension:		
Comment:		

Town Manager Performance Evaluation

7. Fiscal Management		Rating:
a. Prepares a balanced budget to provide services at a level directed by the Board.		2
b. Ensures that the budget meets the operational needs of the organization and makes the best possible use of available funds.		2
c. Prepares the budget in an intelligent but readable format.		3
d. Submits the proposed budget in a timely manner that allows for an appropriate review period.		3
e. Appropriately monitors and manages the fiscal activities of the organization throughout the fiscal year.		2
Total Rating for this Performance Dimension:		
Comment:		

8. Planning and Organizational Development		Rating:
a. Works with the Board, community leaders, and other stakeholders to develop a clear vision, mission, values, and objectives for the organization.		2
b. Effectively prioritizes goals and objectives in order to ensure that the organization is doing "first things first" in support of its strategic plan.		2
c. Maintains a healthy and productive organizational culture focused on customer service and responsible stewardship of the organization's resources.		1
d. Has a capacity for and encourages innovation.		2
e. Reviews ordinances, policies, and procedures periodically to suggest improvements.		2
Total Rating for this Performance Dimension:		
Comment:		

Town Manager Performance Evaluation

9. Leadership and Decision-Making		Rating:
a. Leads the organization by example in adhering to its established policies, rules, and procedures, and ensures that subordinates do the same.		2
b. Acknowledges the efforts of others and gives appropriate credit for their accomplishments.		4
c. Is effective at building consensus among stakeholders on new or unpopular policies or initiatives.		2
d. Makes logical decisions based on a thorough review of available information and soliciting input from appropriate sources.		2
e. Is able to effectively make decisions rapidly in situations where information is limited, and the outcome might be uncertain.		2
Total Rating for this Performance Dimension:		
Comment:		

10. Individual Characteristics		Rating:
a. Consistently acts with professionalism and courtesy, including prompt attendance at meetings, returning phone calls/messages, and adhering to scheduled appointments.		2
b. Ensures that all business conducted by the organization is free of conflicts of interest or practices that might be construed as illegal, unethical, or unprofessional.		1
c. Is energetic, cooperative, and willing to spend whatever time is necessary to do a good job.		3
d. Has the capacity to listen to others and to recognize their interests.		2
e. Avoids political positions, partisanship, and unnecessary controversy.		2
Total Rating for this Performance Dimension:		
Comment:		

Town Manager Performance Evaluation

Summary:

Performance Dimension:	Overall Rating:	
1. Professional Skills and Expertise	8	
2. Council/Commission Relations	10	
3. Citizen and Public Relations	6	
4. Policy Execution	11	
5. Intergovernmental Relations	9	
6. Staffing and Management	12	
7. Fiscal Management	12	
8. Planning and Organizational Development	9	
9. Leadership and Decision-Making	12	
10. Individual Characteristics	10	

Total Score: 99

Total Average Rating: 1.98

Date: 9/23/25

SEAN'S EVALUATION

1. PROFESSIONAL SKILLS AND EXPERTISE

Sean does not provide councilors information regarding decisions made at the state level, and even the county level, that may effect our town. In fact, he does not seem to have a handle on state issues that could effect Howey In The Hills. Sean is not proactive in finding out what changes in the law could effect us. Sean almost always acts reactively as opposed to proactively. It is clear and obvious that Sean favors certain councilors over others, which is demonstrated by those councilors that have updated information versus those that do not have the updates.

2. COUNCIL COMMISSION RELATIONS

Sean favors certain councilors over others, which is quite clear as he carries out his directives. He does not provide Information to councilors at the same time. He talks with a couple of councilors on a regular basis, and gives them information first. He does not acknowledge the authority of the council, as we often see issues that have been voted on, reappearing as slightly different items.

3. CITIZENS AND PUBLIC RELATIONS

Sean does not engage with the public at all. He conveys nothing to residents regarding cost-effective manners. Sean does not schedule forums or town meetings where residents can speak with him and express their concerns. Numerous residents have told me that they have called Sean and left messages, and he does not return their calls, even after several messages. This not only extends to Sean, but also to town staff. Some people have told me that they think the town policy is to not answer phones.

Our town government continues to operate behind closed doors, and provides no transparency. There are certain councilors (including myself), that are not privy to decisions and procedures that are being made. These actions are the exact opposite of transparency, and is the reason that I do not totally trust Sean. Sean does not make public presentations and provides little information to the news media. It feels like we do not want anyone to know what is going on in Howey.

4. POLICY EXECUTION

Our Town Manager does not always support the actions of the board after a decision has been reached. This was evident during this year's budget process. Sean tries everything within his power to shift the Board's decisions to his way of thinking. It often appears that Sean feels that he has more power than Town Council instead of the other way around.

5. INTERGOVERNMENTAL RELATIONS

I rarely see Sean at various county and state meetings. When he does attend, he tends to sit by himself or with the Mayor, and does not interact with other officials. He does not seem to be involved in any state initiatives. In all of the

outside meetings that I have attended, not one official (with the exception of T.J Fish from Groveland) has ever mentioned his name. They do not even seem to know who he is. Since I have known Sean, I cannot remember him ever talking about a law or other issue that may effect Howey In The Hills or other government entities. He attends few Heartland LLC Meetings, and does not attend the Florida LLC Conference. Perhaps Sean does get involved more than I realize, but if so, he does not talk with councilors about it.

6. STAFFING AND MANAGEMENT

I am not convinced that Sean has a good handle regarding staff weaknesses. All we hear from him is how wonderful all staff members are in completing their duties, This isn't a realistic assessment. There is no government entity that is a utopia. Sean does do a good job of promoting training and development opportunities.

I have had several residents tell me that told me that staff d not get back to them.

7. FISCAL MANAGEMENT

For the last three years, Sean has included new construction revenues in the budget that never materialized. This resulted in fund transfers and ate into reserves. It does not appear that Sean makes the best use of available funds. He has focused too much on staff wage increases, while not paying attention to residents concerns. The changes made by Oscar and the Mayor in reporting and account funds, point out that Sean was in "over his head" with the budget.

8. PLANNING AND ORGANIZATIONAL DEVELOPMENT

If Sean has a vision regarding the town, I have never heard him express it. Sean does not appear to meet with other community leaders or with leaders of other communities on a regular basis. There is also no focus on customer service or innovation.

The Town Manager does not coordinate the efforts of the Town Engineer, Public Works Director or MPO Representative regarding the roads in the Town, or with their interactions with FDOT. Instead of working together in a coordinated and unified effort, we are all doing our own thing and are told what the others are doing. This casts a terrible light on our town, which results in goals not being reached. Sean is a poor communicator and organizer, which drastically hurts our town.

9. LEADERSHIP AND DECISION MAKING

The Town Staff is well aware of what Sean agrees with or does not agree with as far as the Council's decisions. He does not solicit input from appropriate sources when he makes a decision. He does not make decisions rapidly and generally procrastinates and does things "at the last minute". This was evidenced in the letter submitted to the Lake County Board County Commissioners regarding Margaret Brock's request for rezoning. Sean sent the letter the night before the 9:00 am meeting, giving the Commissioners no time to read the letter prior to the meeting. The evening before the LCBCC Meeting regarding the Local Option Gas Tax, I asked Sean to please get me a copy of the letter that the town had sent to the BCC. When I got up the next morning to get ready to go the meeting, there was no copy of the letter. I called Sean at 7:20 am to

see where the letter was. Sean did not pick up, so I left a Voice Mail saying that I needed the letter. The letter was finally E-mailed at 8:54 am. Unfortunately, I had left for the 9:00 am meeting at 8:20 am. This is routine behavior for Sean. Sean is very good about acknowledging the efforts of others.

10. INDIVIDUAL CHARACTERISTICS

In my mind, Sean is not a good communicator. He does not return phone calls regularly, he does not listen well to others, and he shies away from public involvement.

Although not unethical or illegal, I believe the situation with our Library and past donations to the Troops of St. George represents a huge conflict of interest. I also believe that Sean's working remotely in Italy sent a bad message to staff. It was also not a good look for staff to see Sean's willingness to give one staff member a 26.26 percent wage increase.



Town Manager Performance Evaluation

Town Manager's Name: Sean O'Keefe

Council Member Name: Mayor Wells

Evaluation Period: April 1, 2025 to September 30, 2025

Evaluation Date: October 7, 2025

Evaluation Instructions:

This form shall be completed by each member of the Council to evaluate the Town Manager's performance in each of the areas noted below. Each member of the Board shall sign the end of the form and forward it to the Town Clerk. Performance levels can be based on the following scale:

- 5 – EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 – SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrates no appreciable performance deficiencies.
- 3 – SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 – FAIR:** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 – UNSATISFACTORY:** The incumbent frequently fails to meet minimum performance expectations.

Timeline: April 1, 2025 through September 30, 2025

Town Manager Performance Evaluation

Performance Dimensions:

1. Professional Skills and Expertise		Rating:
a. Is knowledgeable of current developments affecting the management field and affecting local governments.		<u>4</u>
b. Regularly provides accurate, comprehensive reports concerning matters of importance to the organization.		<u>4</u>
c. Anticipates problems and develops effective approaches for solving them.		<u>3</u>
d. Offers workable alternatives when changes in the law render the administration of an ordinance or policy impractical.		<u>3</u>
e. Sets a professional example by handling the affairs of the organization in a fair and impartial manner.		<u>5</u>
Total Rating for this Performance Dimension:		19
Comment:	I believe that Sean has a better than average understanding of what is required of a town manager. The most recent JPA meeting in Leesburg showed that while most municipal elected officials, county commissioners and city and town managers knew little or nothing about the topic being discussed, Sean had a good understanding of the Transfer of Development rights which the county wants to embrace. On reporting, it is not just what Sean reports but also what his department heads and staff also report. Each first council meeting, complete reports are provided to council on all areas of the management of the town and its financial position. He is completely engaged in the management of the town, which is a complex and difficult job. If you have never done it, you just won't understand. It's like an iceberg, easy to judge the part that you can see but not all the other attributes of his performance that are taken for granted.	

2. Council/Commission Relations		Rating:
a. Carries out directives of the Board as a whole rather than those of any one Boardmember.		3
b. In responding the requests for information, provides complete, accurate, and timely information equally to all Board members.		4

Town Manager Performance Evaluation

c. Assists the Board by resolving problems at the administrative level to avoidunnecessary Board action.		3
d. Assists the Board in establishing policy while acknowledging the ultimate authority of the Board.		5
e. Is willing to try new ideas proposed by Board members.		5
Total Rating for this Performance Dimension:		20
Comment:	As the CEO of the town, he has to balance the actions that he takes on a day-to-day basis while working with individual council members who at times undermine his responsibilities and authority as the Chief Executive Officer. He is always open to new ideas and carries out the directives of the council as a whole once policy has been agreed.	

Town Manager Performance Evaluation

3. Citizen and Public Relations		Rating:
a. Effectively conveys to the public that the organization delivers services in a cost-effective manner without sacrificing quality and customer focus.		3
b. Is willing to meet with members of the community and is responsive to their concerns.		4
c. Demonstrates a dedication to service to the community and its citizens.		5
d. Expresses information orally in a clear and concise manner when making public presentations.		5
e. Is skillful with the news media, proactively providing information that is important to the public.		3
Total Rating for this Performance Dimension:		20
Comment:	Sean is a skilled communicator. This is seen in both council meetings and meetings with outside agencies. He is clear in his understanding of the subject matter and succinct in the way he puts it across to his audience.	

4. Policy Execution		Rating:
a. Understands, supports, and enforces the organization's ordinances, policies, and procedures.		3
b. Clearly identifies and communicates expectations to the organization regarding the implementation of policies enacted by the Board.		4
c. Implements Board actions in accordance with the intent of the Board.		4
d. Supports the actions of the Board after a decision has been reached, both inside and outside the organization.		4
e. Helps internal and external stakeholders to achieve common objectives within the parameters of established Board policies.		4
Total Rating for this Performance Dimension:		19
Comment:	Sean carries out the policies of the board even when he may not agree with their decision. I believe he respects the authority of the council and conveys the policies to be followed by all staff.	

Town Manager Performance Evaluation

5. Intergovernmental Relations		Rating:
a. Promotes a positive working relationship with other governmental entities.		4
b. Engages with other local, regional, state, and federal agencies to accomplish local initiatives.		2
c. Positively and effectively represents the organization and its interests when working with other governmental agencies.		4
d. Maintains awareness of laws and other issues affecting other governmental agencies which may affect the organization.		3
e. Is willing to share resources or information with other governmental agencies as appropriate.		3
Total Rating for this Performance Dimension:		16
Comment:	Balancing the time necessary to ensure that the workings of the town runs smoothly and interaction with other agencies is not always easy. He always represents the town in a positive manner and puts the town and its citizens first in all matters. I believe that this is one area that has room for improvement, particularly with regards to state and federal funding.	

6. Staffing and Management		Rating:
a. Recruits and retains competent personnel for Town positions.		4
b. Is aware of staff weaknesses and works to improve their performance.		3
c. Promotes training and development opportunities for employees at all levels of the organization.		3
d. Stays accurately informed and concerned about employee relations.		4
e. Is able to discern when it is necessary to assume charge of situations that would normally be handled by a subordinate and when it is necessary to only provide guidance and support.		3
Total Rating for this Performance Dimension:		17
Comment:	The town has a first-class staff. The additions of the finance supervisor after two bad calls and the library director are both inspired hirings. Finding good people is always difficult and nurturing them to be better is a first priority. Treating them well and acknowledging and respecting their efforts should be a priority for management and council members alike.	

Town Manager Performance Evaluation

	The cost and time of hiring and training new members of staff is considerable, and we should do everything to retain our dedicated staff. I believe the Town Manager has the welfare of each individual at heart. The biggest area of difficulty has been with the PD and in particular the police chief. He has never accepted Sean's authority as the town manager and has regularly circumvented it by going directly to council members to further his personal agenda. This is never acceptable and should not be encouraged or tolerated by council members. His bias against Sean and encouraging others in the same vein is totally disrespectful making Sean's job which is hard enough even harder.	
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Town Manager Performance Evaluation

7. Fiscal Management		Rating:
a. Prepares a balanced budget to provide services at a level directed by the Board.		5
b. Ensures that the budget meets the operational needs of the organization and makes the best possible use of available funds.		5
c. Prepares the budget in an intelligent but readable format.		5
d. Submits the proposed budget in a timely manner that allows for an appropriate review period.		4
e. Appropriately monitors and manages the fiscal activities of the organization throughout the fiscal year.		3
Total Rating for this Performance Dimension:		22
Comment:	The financial reporting provided by staff has enabled the town manager to submit the best, most accurate and transparent budget that the town has ever produced. It not only covered all of the town's expenditure but provided a surplus in both the general fund and water fund even after a reduction in the millage rate and no increases in any tax or charge to the citizens of Howey. This shows a complete shift and improvement in his financial performance, and he and his staff should be commended for this excellent achievement.	

8. Planning and Organizational Development		Rating:
a. Works with the Board, community leaders, and other stakeholders to develop a clear vision, mission, values, and objectives for the organization.		3
b. Effectively prioritizes goals and objectives in order to ensure that the organization is doing "first things first" in support of its strategic plan.		3
c. Maintains a healthy and productive organizational culture focused on customer service and responsible stewardship of the organization's resources.		4
d. Has a capacity for and encourages innovation.		3
e. Reviews ordinances, policies, and procedures periodically to suggest improvements.		3
Total Rating for this Performance Dimension:		16
Comment:	Given the complexities and diversity of his job, overall, I believe that his	

Town Manager Performance Evaluation

	performance in this area is satisfactory but has room for improvement. I do however believe that all the staff are intent on providing excellent customer service.	
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Town Manager Performance Evaluation

9. Leadership and Decision-Making		Rating:
a. Leads the organization by example in adhering to its established policies, rules, and procedures, and ensures that subordinates do the same.		4
b. Acknowledges the efforts of others and gives appropriate credit for their accomplishments.		3
c. Is effective at building consensus among stakeholders on new or unpopular policies or initiatives.		4
d. Makes logical decisions based on a thorough review of available information and soliciting input from appropriate sources.		4
e. Is able to effectively make decisions rapidly in situations where information is limited, and the outcome might be uncertain.		3
Total Rating for this Performance Dimension:		18
Comment:	I would describe Sean's management style as steady but thorough. He lacks the dynamism of some city managers, but his overall personality is appropriate when balancing the position between CEO and dealing with the individual personalities of the council members.	

10. Individual Characteristics		Rating:
a. Consistently acts with professionalism and courtesy, including prompt attendance at meetings, returning phone calls/messages, and adhering to scheduled appointments.		4
b. Ensures that all business conducted by the organization is free of conflicts of interest or practices that might be construed as illegal, unethical, or unprofessional.		4
c. Is energetic, cooperative, and willing to spend whatever time is necessary to do a good job.		4
d. Has the capacity to listen to others and to recognize their interests.		4
e. Avoids political positions, partisanship, and unnecessary controversy.		3
Total Rating for this Performance Dimension:		19
Comment:	Sean is an upstanding individual and has done a very good job for the town. There are some shortcomings, but he has also had to deal with the slings and arrows and in some cases ugly and unprofessional conduct of council members. In all leadership you get more from people with the	

Town Manager Performance Evaluation

	carrot rather than the stick. Threatening someone's job in a public setting is never acceptable and only seeks to cause division that is felt not only by him but throughout his staff. Our role as leaders is to foster trust and cooperation with all the staff. Instead, we are seeing cynicism, paranoia and self-interest. If we want our town manager to perform better, it starts with us. If not, we are doomed to in-fighting, fragmentation and failure.
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Town Manager Performance Evaluation

Summary:

Performance Dimension:	Overall Rating:	
1. Professional Skills and Expertise		19
2. Council/Commission Relations		20
3. Citizen and Public Relations		20
4. Policy Execution		19
5. Intergovernmental Relations		16
6. Staffing and Management		17
7. Fiscal Management		22
8. Planning and Organizational Development		16
9. Leadership and Decision-Making		18
10. Individual Characteristics		19

Total Score: 186

Total Average Rating: 3.72

Graham Wells

10/6/2025



Town Manager Performance Evaluation

Town Manager's Name: Sean O'Keefe

Council Member Name: Jonathan Arnold

Evaluation Period: October 1, 2023 to March 31, 2025

Evaluation Date: 7 Oct 2025

Evaluation Instructions:

This form shall be completed by each member of the Council to evaluate the Town Manager's performance in each of the areas noted below. Each member of the Board shall sign the end of the form and forward it to the Town Clerk. Performance levels can be based on the following scale:

- 5 – EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 – SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrates no appreciable performance deficiencies.
- 3 – SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 – FAIR:** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 – UNSATISFACTORY:** The incumbent frequently fails to meet minimum performance expectations.

Timeline: April 1, 2025 through Sept 30, 2025

Town Manager Performance Evaluation

Performance Dimensions:

1. Professional Skills and Expertise		Rating:
a. Is knowledgeable of current developments affecting the management field and affecting local governments.		<u>4</u>
b. Regularly provides accurate, comprehensive reports concerning matters of importance to the organization.		<u>4</u>
c. Anticipates problems and develops effective approaches for solving them.		<u>5</u>
d. Offers workable alternatives when changes in the law render the administration of an ordinance or policy impractical.		<u>5</u>
e. Sets a professional example by handling the affairs of the organization in a fair and impartial manner.		<u>5</u>
Total Rating for this Performance Dimension:		5
Comment:	Continuing outstanding awareness of the impact external and internal events can have on the town and people.	

2. Council/Commission Relations		Rating:
a. Carries out directives of the Board rather than those of any one Board member.		5
b. In responding the requests for information, provides complete, accurate, and timely information equally to all Board members.		4
c. Assists the Board by resolving problems at the administrative level to avoid unnecessary Board action.		5
d. Assists the Board in establishing policy while acknowledging the ultimate authority of the Board.		5
e. Is willing to try new ideas proposed by Board members.		5
Total Rating for this Performance Dimension:		5
Comment:	Outstanding board relationships, patience continues to be exemplary. Not easy to have five bosses. "A multitude of rulers is not a good thing. Let there be one ruler, one king," Herodotus, 5th Century BC.	

Town Manager Performance Evaluation

3. Citizen and Public Relations		Rating:
a. Effectively conveys to the public that the organization delivers services in a cost-effective manner without sacrificing quality and customer focus.		4
b. Is willing to meet with members of the community and is responsive to their concerns.		5
c. Demonstrates a dedication to service to the community and its citizens.		5
d. Expresses information orally in a clear and concise manner when making public presentations.		4
e. Is skillful with the news media, proactively providing information that is important to the public.		4
Total Rating for this Performance Dimension:		4
Comment:	Public speaking is outstanding, explanations succinct, regularly assist people. Understands importance of proactive public relations,	

4. Policy Execution		Rating:
a. Understands, supports, and enforces the organization's ordinances, policies, and procedures.		5
b. Clearly identifies and communicates expectations to the organization regarding the implementation of policies enacted by the Board.		4
c. Implements Board actions in accordance with the intent of the Board.		5
d. Supports the actions of the Board after a decision has been reached, both inside and outside the organization.		5
e. Helps internal and external stakeholders to achieve common objectives within the parameters of established Board policies.		5
Total Rating for this Performance Dimension:		5
Comment:	Strong skills, conveys board intent to others, points out potential undesirable consequences of Board desires.	

Town Manager Performance Evaluation

5. Intergovernmental Relations		Rating:
a. Promotes a positive working relationship with other governmental entities.		5
b. Engages with other local, regional, state, and federal agencies to accomplish local initiatives.		5
c. Positively and effectively represents the organization and its interests when working with other governmental agencies.		4
d. Maintains awareness of laws and other issues affecting other governmental agencies which may affect the organization.		4
e. Is willing to share resources or information with other governmental agencies as appropriate.		4
Total Rating for this Performance Dimension:		4
Comment:	Excellent skills, increasing focus on obtaining resources for the town	

6. Staffing and Management		Rating:
a. Recruits and retains competent personnel for Town positions.		4
b. Is aware of staff weaknesses and works to improve their performance.		4
c. Promotes training and development opportunities for employees at all levels of the organization.		3
d. Stays accurately informed and concerned about employee relations.		4
e. Can discern when it is necessary to assume charge of situations that would normally be handled by a subordinate and when it is necessary to only provide guidance and support.		4
Total Rating for this and how to Performance Dimension:		4
Comment:	Understands staff and resident desires. Anticipates future skills for town and plans how to acquire them.	

Town Manager Performance Evaluation

7. Fiscal Management		Rating:
a. Prepares a balanced budget to provide services at a level directed by the Board.		5
b. Ensures that the budget meets the operational needs of the organization and makes the best possible use of available funds.		5
c. Prepares the budget in an intelligent but readable format.		5
d. Submits the proposed budget in a timely manner that allows for an appropriate review period.		5
e. Appropriately monitors and manages the fiscal activities of the organization throughout the fiscal year.		5
Total Rating for this Performance Dimension:		5
Comment:	Most impressive performance for FY2025, General category finished in the black for 3 years in a row! Marked improvement over previous years trend of deficits before assuming current position of Town Manager.	

8. Planning and Organizational Development		Rating:
a. Works with the Board, community leaders, and other stakeholders to develop a clear vision, mission, values, and objectives for the organization.		4
b. Effectively prioritizes goals and objectives to ensure that the organization is doing "first things first" in support of its strategic plan.		4
c. Maintains a healthy and productive organizational culture focused on customer service and responsible stewardship of the organization's resources.		4
d. Has a capacity for and encourages innovation.		5
e. Reviews of ordinances, policies, and procedures periodically to suggest improvements.		3
Total Rating for this Performance Dimension:		4
Comment:	Developed an organization chart to help clarify roles and responsibilities. "Plans are useless, planning is invaluable," Dwight Eisenhower	

Town Manager Performance Evaluation

9. Leadership and Decision-Making		Rating:
a. Leads the organization by example in adhering to its established policies, rules, and procedures, and ensures that subordinates do the same.		4
b. Acknowledges the efforts of others and gives appropriate credit for their accomplishments.		4
c. Is effective at building consensus among stakeholders on new or unpopular policies or initiatives.		4
d. Makes logical decisions based on a thorough review of available information and soliciting input from appropriate sources.		4
e. Can effectively make decisions rapidly in situations where information is limited, and the outcome might be uncertain.		3
Total Rating for this Performance Dimension:		4
Comment:	Sound and effective decision making with an emphasis to formulate decisions to be adaptive in fluid situations.	

10. Individual Characteristics		Rating:
a. Consistently acts with professionalism and courtesy, including prompt attendance at meetings, returning phone calls/messages, and adhering to scheduled appointments.		5
b. Ensures that all business conducted by the organization is free of conflicts of interest or practices that might be construed as illegal, unethical, or unprofessional.		5
c. Is energetic, cooperative, and willing to spend whatever time is necessary to do a good job.		5
d. Has the capacity to listen to others and to recognize their interests.		5
e. Avoids political positions, partisanship, and unnecessary controversy.		5
Total Rating for this Performance Dimension:		5
Comment:	Continues to not only be devoid of duplicity, dishonesty, or manipulation, but has the bravery to resist those detestable traits "Honesty and courage are essential," Teddy Roosevelt	

Town Manager Performance Evaluation

Overall Assessment: An improvement from last period. Thoughtful and resourceful leader who continues to improve. More in the form of an Eisenhower not a Patton. Quiet leadership is difficult to discern and appreciate. Focus on structured town growth and associated services remains exemplary. Fiscal management has emerged as the strongest skill set. Still needs to improve on developing a sense of urgency within the town staff. Focus should be on task completion, not time oriented. While accuracy has improved it continues to be elusive as exhibited by actual project costs exceeding planned costs on some projects. The goal should be 100% accuracy. Development of an organizational chart is highly commendable, remember to update it as the town grows. Need to resist increasing staff without conducting a work study or flow. Still need to develop a recognition system for the volunteer committees, a simple certificate of recognition can go a long way to bolstering their sense of appreciation. You continue to improve both personally and professionally, be alert for career opportunities.

Town Manager Performance Evaluation

Summary:

Performance Dimension:	Overall Rating:	
1. Professional Skills and Expertise		5
2. Council/Commission Relations		5
3. Citizen and Public Relations		4
4. Policy Execution		5
5. Intergovernmental Relations		4
6. Staffing and Management		4
7. Fiscal Management		5
8. Planning and Organizational Development		4
9. Leadership and Decision-Making		4
10. Individual Characteristics		5

Total Score: 45

Total Average Rating: 4.5

Date: 7 Oct 2025



Town Manager Performance Evaluation

Town Manager's Name: Sean O'Keefe

Council Member Name: Reneé Lannamañ

Evaluation Period: April 1, 2025 to September 30, 2025

Evaluation Date: October 7, 2025

Evaluation Instructions:

This form shall be completed by each member of the Council to evaluate the Town Manager's performance in each of the areas noted below. Each member of the Board shall sign the end of the form and forward it to the Town Clerk. Performance levels can be based on the following scale:

- 5 – EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 – SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrates no appreciable performance deficiencies.
- 3 – SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 – FAIR:** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 – UNSATISFACTORY:** The incumbent frequently fails to meet minimum performance expectations.

Timeline: April 1, 2025 through September 30, 2025

Town Manager Performance Evaluation

Performance Dimensions:

1. Professional Skills and Expertise		Rating:
a. Is knowledgeable of current developments affecting the management field and affecting local governments.		3
b. Regularly provides accurate, comprehensive reports concerning matters of importance to the organization.		3
c. Anticipates problems and develops effective approaches for solving them.		3
d. Offers workable alternatives when changes in the law render the administration of an ordinance or policy impractical.		3
e. Sets a professional example by handling the affairs of the organization in a fair and impartial manner.		3
Total Rating for this Performance Dimension:		15
Comment:	I would like to recommend the Town Manager work on solving the appearance of being partial regarding employees and the issues that concern them.	

2. Council/Commission Relations		Rating:
a. Carries out directives of the Board as a whole rather than those of any one Boardmember.		2
b. In responding the requests for information, provides complete, accurate, and timely information equally to all Board members.		3
c. Assists the Board by resolving problems at the administrative level to avoid unnecessary Board action.		2
d. Assists the Board in establishing policy while acknowledging the ultimate authority of the Board.		3
e. Is willing to try new ideas proposed by Board members.		3
Total Rating for this Performance Dimension:		13
Comment:		

Town Manager Performance Evaluation

3. Citizen and Public Relations		Rating:
a. Effectively conveys to the public that the organization delivers services in a cost-effective manner without sacrificing quality and customer focus.		2
b. Is willing to meet with members of the community and is responsive to their concerns.		3
c. Demonstrates a dedication to service to the community and its citizens.		3
d. Expresses information orally in a clear and concise manner when making public presentations.		3
e. Is skillful with the news media, proactively providing information that is important to the public.		2
Total Rating for this Performance Dimension:		13
Comment:		

4. Policy Execution		Rating:
a. Understands, supports, and enforces the organization's ordinances, policies, and procedures.		4
b. Clearly identifies and communicates expectations to the organization regarding the implementation of policies enacted by the Board.		3
c. Implements Board actions in accordance with the intent of the Board.		3
d. Supports the actions of the Board after a decision has been reached, both inside and outside the organization.		4
e. Helps internal and external stakeholders to achieve common objectives within the parameters of established Board policies.		3
Total Rating for this Performance Dimension:		17
Comment:		

Town Manager Performance Evaluation

5. Intergovernmental Relations		Rating:
a. Promotes a positive working relationship with other governmental entities.		3
b. Engages with other local, regional, state, and federal agencies to accomplish local initiatives.		3
c. Positively and effectively represents the organization and its interests when working with other governmental agencies.		3
d. Maintains awareness of laws and other issues affecting other governmental agencies which may affect the organization.		3
e. Is willing to share resources or information with other governmental agencies as appropriate.		3
Total Rating for this Performance Dimension:		15
Comment:		

6. Staffing and Management		Rating:
a. Recruits and retains competent personnel for Town positions.		3
b. Is aware of staff weaknesses and works to improve their performance.		3
c. Promotes training and development opportunities for employees at all levels of the organization.		3
d. Stays accurately informed and concerned about employee relations.		3
e. Is able to discern when it is necessary to assume charge of situations that would normally be handled by a subordinate and when it is necessary to only provide guidance and support.		2
Total Rating for this Performance Dimension:		14
Comment:		

Town Manager Performance Evaluation

7. Fiscal Management		Rating:
a. Prepares a balanced budget to provide services at a level directed by the Board.		3
b. Ensures that the budget meets the operational needs of the organization and makes the best possible use of available funds.		3
c. Prepares the budget in an intelligent but readable format.		3
d. Submits the proposed budget in a timely manner that allows for an appropriate review period.		3
e. Appropriately monitors and manages the fiscal activities of the organization throughout the fiscal year.		3
Total Rating for this Performance Dimension:		15
Comment:		

8. Planning and Organizational Development		Rating:
a. Works with the Board, community leaders, and other stakeholders to develop a clear vision, mission, values, and objectives for the organization.		3
b. Effectively prioritizes goals and objectives in order to ensure that the organization is doing "first things first" in support of its strategic plan.		3
c. Maintains a healthy and productive organizational culture focused on customer service and responsible stewardship of the organization's resources.		3
d. Has a capacity for and encourages innovation.		3
e. Reviews ordinances, policies, and procedures periodically to suggest improvements.		3
Total Rating for this Performance Dimension:		15
Comment:		

Town Manager Performance Evaluation

9. Leadership and Decision-Making		Rating:
a. Leads the organization by example in adhering to its established policies, rules, and procedures, and ensures that subordinates do the same.		3
b. Acknowledges the efforts of others and gives appropriate credit for their accomplishments.		3
c. Is effective at building consensus among stakeholders on new or unpopular policies or initiatives.		3
d. Makes logical decisions based on a thorough review of available information and soliciting input from appropriate sources.		3
e. Is able to effectively make decisions rapidly in situations where information is limited, and the outcome might be uncertain.		3
Total Rating for this Performance Dimension:		15
Comment:		

10. Individual Characteristics		Rating:
a. Consistently acts with professionalism and courtesy, including prompt attendance at meetings, returning phone calls/messages, and adhering to scheduled appointments.		4
b. Ensures that all business conducted by the organization is free of conflicts of interest or practices that might be construed as illegal, unethical, or unprofessional.		3
c. Is energetic, cooperative, and willing to spend whatever time is necessary to do a good job.		3
d. Has the capacity to listen to others and to recognize their interests.		4
e. Avoids political positions, partisanship, and unnecessary controversy.		3
Total Rating for this Performance Dimension:		17
Comment:		

Town Manager Performance Evaluation

Summary:

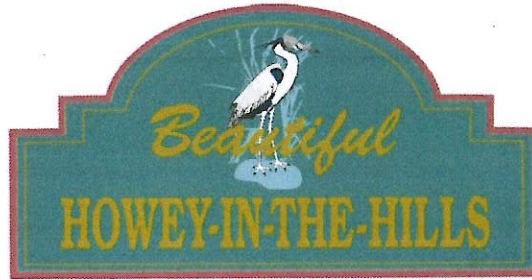
Performance Dimension:	Overall Rating:	
1. Professional Skills and Expertise		15
2. Council/Commission Relations		13
3. Citizen and Public Relations		13
4. Policy Execution		17
5. Intergovernmental Relations		15
6. Staffing and Management		14
7. Fiscal Management		15
8. Planning and Organizational Development		15
9. Leadership and Decision-Making		15
10. Individual Characteristics		16

Total Score: **149**

Total Average Rating:

Date: **October 6, 2025**

In conclusion, would like to comment on the growth observed in Sean. While this evaluation ask distinct questions, some do not reflect the overall observations of watching the Town Manager grow into the position he is responsible to accomplish. In my opinion, Sean receives a lot of conflicting request and reversals from the Town Council, which in turn places him in a compromising position to decide what is the best next steps. The Town Manager continues to perform the duties of the position in a consistent and reliable manner. Operations are managed effectively, and communication with this Councilor is courteous, professional, and demonstrates sound judgment with a great teamwork attitude. For example, this year's budget was the best report presented to Council since I have been serving. Previous budgets were mottled with confusion and to many figure-it-out columns. This is a dramatic improvement from years prior. While Sean's performance is "satisfactory" in my evaluation, I want to encourage our Town Manager to focus on long-term planning, proactive community engagement, and thinking of how bring commerce and more activities to the Town. This will help strengthen overall effectiveness and advance the Town's growth goals for a better future with sustainability.



Town Manager Performance Evaluation

Town Manager's Name: Sean O'Keefe
 Council Member Name: _____
 Evaluation Period: April 1, 2025 to September 30, 2025
 Evaluation Date: October 7, 2025

Evaluation Instructions:

This form shall be completed by each member of the Council to evaluate the Town Manager's performance in each of the areas noted below. Each member of the Board shall sign the end of the form and forward it to the Town Clerk. Performance levels can be based on the following scale:

- 5 – EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 – SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrates no appreciable performance deficiencies.
- 3 – SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 – FAIR:** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 – UNSATISFACTORY:** The incumbent frequently fails to meet minimum performance expectations.

Timeline: April 1, 2025 through September 30, 2025

Town Manager Performance Evaluation

Performance Dimensions:

1. Professional Skills and Expertise	Rating:
a. Is knowledgeable of current developments affecting the management field and affecting local governments.	2
b. Regularly provides accurate, comprehensive reports concerning matters of importance to the organization.	1
c. Anticipates problems and develops effective approaches for solving them.	2
d. Offers workable alternatives when changes in the law render the administration of an ordinance or policy impractical.	2
e. Sets a professional example by handling the affairs of the organization in a fair and impartial manner.	1
Total Rating for this Performance Dimension:	
8	
Comment:	Does not handle Town affairs in an impartial manner. I find he works more closely with the Mayor and follows his lead, often when a majority of the Council desires to go in a different direction. A recent example involved the employee and council pay raise issues. Councilor Town Manager

2. Council/Commission Relations	Rating:
a. Carries out directives of the Board as a whole rather than those of any one Boardmember.	2
b. In responding the requests for information, provides complete, accurate, and timely information equally to all Board members.	1
c. Assists the Board by resolving problems at the administrative level to avoid unnecessary Board action.	1
d. Assists the Board in establishing policy while acknowledging the ultimate authority of the Board.	1
e. Is willing to try new ideas proposed by Board members.	1
Total Rating for this Performance Dimension:	
6	
Comment:	Often does not handle controversial

lead to make a decision to remove three items from the agenda because the Council had already decided these matters. He action should

items well, I have had to request to have an item placed on the agenda up to four times before

it appeared. The Mayor can introduce new items at a meeting. Example is the ^{delegation of} power of Cost Holly.

Town Manager Performance Evaluation

3. Citizen and Public Relations	Rating:
a. Effectively conveys to the public that the organization delivers services in a cost-effective manner without sacrificing quality and customer focus.	2
b. Is willing to meet with members of the community and is responsive to their concerns.	3
c. Demonstrates a dedication to service to the community and its citizens.	2
d. Expresses information orally in a clear and concise manner when making public presentations.	2
e. Is skillful with the news media, proactively providing information that is important to the public.	2
Total Rating for this Performance Dimension:	11
Comment:	Item 3e is not seen as no media entity covers the Town of Hovey meetings. I am concerned in the way the library is operated. It seems to cater to the home school group. The library is not a substitute school.

4. Policy Execution	Rating:
a. Understands, supports, and enforces the organization's ordinances, policies, and procedures.	2
b. Clearly identifies and communicates expectations to the organization regarding the implementation of policies enacted by the Board.	2
c. Implements Board actions in accordance with the intent of the Board.	3
d. Supports the actions of the Board after a decision has been reached, both inside and outside the organization.	3
e. Helps internal and external stakeholders to achieve common objectives within the parameters of established Board policies.	2
Total Rating for this Performance Dimension:	12

Comment:	Supports those policies he agrees with when it is convenient. Is not a leader, rather he follows the direction of the Mayor.
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Town Manager Performance Evaluation

5. Intergovernmental Relations		Rating:
a. Promotes a positive working relationship with other governmental entities.		4
b. Engages with other local, regional, state, and federal agencies to accomplish local initiatives.		3
c. Positively and effectively represents the organization and its interests when working with other governmental agencies.		2
d. Maintains awareness of laws and other issues affecting other governmental agencies which may affect the organization.		3
e. Is willing to share resources or information with other governmental agencies as appropriate.		3
Total Rating for this Performance Dimension:		15
Comment:	<i>Works well with County government. Have not seen his work with other government entities. Needs to be more forceful in pursuing the Town's position when dealing with developers and other individuals when dealing with each other.</i>	

6. Staffing and Management		Rating:
a. Recruits and retains competent personnel for Town positions.		4
b. Is aware of staff weaknesses and works to improve their performance.		3
c. Promotes training and development opportunities for employees at all levels of the organization.		2
d. Stays accurately informed and concerned about employee relations.		2
e. Is able to discern when it is necessary to assume charge of situations that would normally be handled by a subordinate and when it is necessary to only provide guidance and support.		2
Total Rating for this Performance Dimension:		13
Comment:	<i>Has recruited some high quality employees for Town. Has improved employee performance by attracting better quality employees.</i>	

dealing with the Town.

Town Manager Performance Evaluation

7. Fiscal Management		Rating:
a. Prepares a balanced budget to provide services at a level directed by the Board.		3
b. Ensures that the budget meets the operational needs of the organization and makes the best possible use of available funds.		3
c. Prepares the budget in an intelligent but readable format.		4
d. Submits the proposed budget in a timely manner that allows for an appropriate review period.		2
e. Appropriately monitors and manages the fiscal activities of the organization throughout the fiscal year.		1
Total Rating for this Performance Dimension:		13
Comment:	The budget format was improved this year. From Three items of concern occurred during the budget creation and formulation process. First was the destruction of the Infrastructure Special Revenue fund and the diversion of its proceeds.	

8. Planning and Organizational Development		Rating:
a. Works with the Board, community leaders, and other stakeholders to develop a clear vision, mission, values, and objectives for the organization.		3
b. Effectively prioritizes goals and objectives in order to ensure that the organization is doing "first things first" in support of its strategic plan.		2
c. Maintains a healthy and productive organizational culture focused on customer service and responsible stewardship of the organization's resources.		2
d. Has a capacity for and encourages innovation.		1
e. Reviews ordinances, policies, and procedures periodically to suggest improvements.		3
Total Rating for this Performance Dimension:		11
Comment:	Goals of Town are not clearly focused. Does not always prioritize goals and objectives in a logical fashion. Customer service in the Town needs significant improvement. <i>(Handwritten notes on right margin: second was the salary issue previously discussed by me that was brought before the Council negatively, even after decisions were made.)</i>	

Town Manager Performance Evaluation

9. Leadership and Decision-Making		Rating:
a. Leads the organization by example in adhering to its established policies, rules, and procedures, and ensures that subordinates do the same.		1
b. Acknowledges the efforts of others and gives appropriate credit for their accomplishments.		3
c. Is effective at building consensus among stakeholders on new or unpopular policies or initiatives.		2
d. Makes logical decisions based on a thorough review of available information and soliciting input from appropriate sources.		2
e. Is able to effectively make decisions rapidly in situations where information is limited, and the outcome might be uncertain.		1
Total Rating for this Performance Dimension:		9
Comment:	<i>The Town Manager leaves message during station vacation was handled poorly, especially for our CEO. a poor example was set for other employees.</i>	

10. Individual Characteristics		Rating:
a. Consistently acts with professionalism and courtesy, including prompt attendance at meetings, returning phone calls/messages, and adhering to scheduled appointments.		3
b. Ensures that all business conducted by the organization is free of conflicts of interest or practices that might be construed as illegal, unethical, or unprofessional.		2
c. Is energetic, cooperative, and willing to spend whatever time is necessary to do a good job.		3
d. Has the capacity to listen to others and to recognize their interests.		4
e. Avoids political positions, partisanship, and unnecessary controversy.		2
Total Rating for this Performance Dimension:		14
Comment:	<i>I was very disappointed by Sean's performance during this rating period</i>	

Town Manager Performance Evaluation

Summary:

Performance Dimension:	Overall Rating:	
1. Professional Skills and Expertise	8	1.6
2. Council/Commission Relations	6	1.2
3. Citizen and Public Relations	11	2.2
4. Policy Execution	12	2.4
5. Intergovernmental Relations	15	3.0
6. Staffing and Management	13	2.6
7. Fiscal Management	13	2.6
8. Planning and Organizational Development	11	2.2
9. Leadership and Decision-Making	9	1.8
10. Individual Characteristics	14	

Total Score: 112

Total Average Rating: ~~2.24~~ 2.24

Date: OCT 17, 2024

David R. Miller