



CITY COMMISSION AND CRA BOARD MEETING AGENDA

Monday, September 08, 2025 at 6:00 PM

Historic City Hall, Commission Chambers – 225 East Main Street, Suite 105

www.cityofwauchula.gov

INVOCATION

PLEDGE OF ALLEGIANCE

CALL TO ORDER

ROLL CALL

APPROVAL OF AGENDA

MINUTES FOR APPROVAL

- 1.** Minutes for 07/7/2025 Commission Workshop, 07/14/2025 Budget Workshop and 07/14/2025 Commission Meeting

Recommended Action: Commission's Approval

PUBLIC COMMENT / NON-AGENDA ITEMS

ORDINANCES / PUBLIC HEARINGS

- 2.** Ordinance 2025-07 FLU Map Amendment for School Board Property- 1st Reading

Recommended Action: Commission's Approval

- 3.** Ordinance 2025-08 Rezone for School Board Property - 1st Reading

Recommended Action: Commission's Approval

- 4.** Ordinance 2025-12 FLU Designation for 572 Stenstrom Rd - 1st Reading

Recommended Action: Commission's Approval

- 5.** Ordinance 2025-13 Rezone for 572 Stenstrom Rd - 1st Reading

Recommended Action: Commission's Approval

RECESS COMMISSION MEETING – CONVENE GENERAL PENSION BOARD MEETING

GENERAL PENSION BOARD AGENDA

- 6.** 4th Quarter Pension Report

Recommended Action: Board's Approval

- 7.** 2025-2026 Pension Budget

Recommended Action: Board's Approval

8. OPEB Authorization Letter- Fiscal Year 2025-2026

Recommended Action: Board's Approval

ADJOURN GENERAL PENSION BOARD MEETING – RECONVENE COMMISSION MEETING

9. Approval of General Pension Board Actions

Recommended Action: Commission's Approval

CITY MANAGER / NON-CONSENT

10. Power Cost Adjustment

11. RFQ 25-02 Award Recommendation - CEI Services - Tennessee Street

Recommended Action: Commission's Discretion

12. RFQ 25-01 Award Recommendation - CEI Services - Alabama Street

Recommended Action: Commission's Discretion

13. Interlocal Agreement for use of animal Shelter between the Hardee County Sheriff and The City of Wauchula, Florida

Recommended Action: Commission's Discretion

CONSENT AGENDA

14. RFP 25-01 Award Recommendation

15. Wauchula EAR Affidavit

16. 2025-2026 SRO Agreement

17. EDA Grant for Heardbridge Rd Watermain Loop

18. Surplus Vehicles

19. Set Trick-or-Treating time and date to Friday, October 31. 2025 6pm to 9pm

Recommended Action: Commission's Approval on Items 14-19

CITY ATTORNEY REPORTS

CITY MANAGER REPORT

CITY COMMISSIONER REPORTS

CRA AGENDA

20. Approval of Minutes for 07/07/2025 CRA Workshop, and 07/14/2025 CRA Meeting

Recommended Action: Board's Approval

21. Resolution 2025-01 Adopting the 2025-2026 CRA Budget

Recommended Action: Board Approval

RECESS COMMISSION MEETING – CONVENE CRA BOARD MEETING

ADJOURN CRA BOARD MEETING – RECONVENE COMMISSION MEETING

22. Approval of CRA Board Actions

Recommended Action: Commission's Approval

23. City Manager Annual Evaluation Review

REMINDERS
ADJOURNMENT



CITY COMMISSION AND CRA BOARD WORKSHOP MINUTES

Monday, July 07, 2025 at 5:00 PM

Historic City Hall, Commission Chambers – 225 East Main Street, Suite 105

www.cityofwauchula.gov

INVOCATION

PLEDGE OF ALLEGIANCE

CALL TO ORDER

Nadaskay called the workshop to order at 5:00 pm.

ROLL CALL

PRESENT

Commissioner Anne Miller
Mayor Pro Tem Russell Smith
Mayor Keith Nadaskay
Commissioner Sherri Albritton
Commissioner Gary Smith

STAFF PRESENT

City Manager Olivia Minshew
Deputy City Manager John Eason
Assistant City Manager Sandee Braxton
City Clerk Stephanie Camacho
CRA Director Jessica Newman
Director of Projects and Procurement Ward Grimes
Community Development Director Kyle Long
Chief of Police Ron Curtis

OPEN COMMISSION WORKSHOP

Nadaskay opened the Commission workshop.

1. ITN 25-01 Self Insured Pools Bid Recommendation

Minshew presented the recommendation to award the bid to Public Risk Management (PRM). Minshew provided a breakdown of recommended benefit options, selected by the Insurance Review Committee. Minshew also stated the City wished to cease the current agreement with Acentria as the City's agent of record.

Paul Hebert - World Risk Management
Hebert was present to answer any questions from the Commission.

2. Hardee County BOCC - US Highway 17 Property Development

County Manager Terry Atchley - Hardee County BOCC
Atchley addressed the Commission and explained the purpose of purchasing the

property on Highway 17 was to relocate the Sheriff's Office administrative building and jail complex due to the age, location, and poor condition of its current facility. Atchley stated a conceptual drawing had circulated with the community however, nothing had been finalized yet and the County planned to go through the PUD process which would be brought back to the Commission. Atchley stated the sheriff's office and jail was already fully funded.

Albritton inquired about additional funding for other facilities at this location. Atchley stated a crisis stabilization unit was in consideration, which would also require a PUD process with Commission approval.

A representative from Tri-County Human Services was present and answered questions from the Commission. Discussion revealed this would be a residential facility. Albritton asked what would happen when the residents were released and it was explained that they would have an agreement with the sheriff's office to make an attempt to take the people back to their last known address.

Another concern from the Commission was that the property along Highway 17 would not be available for commercial properties if they were all designated as public/semi-public. Atchley explained the frontage was limited due to the large retention pond and there was discussion with FDOT about relocating that pond however, the County would have to come up with another \$5,000,000-\$6,000,000 in order to do that.

The issue of additional traffic was also mentioned, as well as the impact a jail and crisis stabilization unit may have in that area. The question was asked if this project would be better located near the hospital.

Denise Grimsley - The Development Group / Hardee County IDA/EDA
Grimsley explained the State requirements that must be met before a patient could be released from the facility.

Atchley added that the CSU was also fully funded.

Atchley also explained the County was interested in keeping the portion of the property along Heardbridge Rd as residential zoning to allow for apartments to be built in order to provide housing for law enforcement personnel.

Mark Gilliard - 932 Heardbridge Rd

Gilliard shared his concern of zoning the property public/semi-public and not having control over certain facilities being implemented, as well as the additional traffic that would be added to Heardbridge Rd. Gilliard stated he didn't feel like this project goes along with The Development Group's Building A Vibrant Community study or with the vision of the City.

Sheriff Vent Crawford - Hardee County Sheriff's Office

Crawford was also present and answer questions from the Commission.

3. Fund Balance Request for Tennessee & Alabama Paving Projects

Minshew stated the City had recently went out to bid for repaving Tennessee and Alabama streets. Minshew explained the bids came back and the City was still in need of approximately \$120,000 to cover the lack of grant funds for these projects. Minshew provided the option to use the dollars from the fund balance in order to complete both projects.

4. ITB 25-01 Award Recommendation

5. ITB 25-02 Award Recommendation

Long presented items 4 and 5, recommending to award both projects to Cobb Site Development.

6. RFQ 25-01 CEI Services - Alabama Street Resurfacing Project

7. RFQ 25-02 CEI Services - Tennessee Street Resurfacing Project

Long presented the bid documents for items 6 and 7.

8. School Zone Side Road Flashing Lights

9. Ordinance 2025-11 Annexation of 572 Stenstrom Rd

Long presented the ordinance to the Commission explaining this property was split into two separate parcels, one in City jurisdiction and the other in County jurisdiction. Long stated the property owner was requesting to annex the County parcel into the City in order to combine the two parcels under one parcel ID.

CITY ATTORNEY REPORTS

No report.

CITY MANAGER REPORT

Report given.

CITY COMMISSIONER REPORTS

No report.

CLOSE COMMISSION WORKSHOP

Nadaskay closed the Commission workshop.

OPEN CRA WORKSHOP

Nadaskay opened the CRA workshop.

10. Florida Voluntary Cleanup Tax Credits Agreement

Newman presented the agreement to the Board.

ADJOURNMENT

With no further business to discuss, Nadaskay adjourned the workshop at 6:49 pm.

On July 14, 2025, the City Commission of the City of Wauchula, held its regularly scheduled budget workshop at 4pm. The workshop was held at 225 E. Main Street, Wauchula, Florida.

Nadaskay called the workshop to order.

COMMISSIONERS PRESENT

Commissioner Anne Miller
Mayor Pro Tem Russell Smith
Mayor Keith Nadaskay
Commissioner Sherri Albritton
Commissioner Gary Smith

STAFF PRESENT

City Manager Olivia Minshew
Deputy City Manager John Eason
Assistant City Manager Sandee Braxton
Community Development Director Kyle Long
Assistant Chief of Police Tom Fort
Director of Project Management and Procurement Ward Grimes

2025-2026 Proposed Budget Discussion

Braxton began by stating the 2025-2026 proposed budget was \$26.4 million.

Braxton explained that, although the budget was balanced using the rollback rate, that was only made possible by using fund balance for things that would not normally come out of that fund. Braxton explained the largest contributing factors for the increase in expenses, as well as a few strategies to increase revenues, which included a potential tax increase.

Braxton discussed the following Contributing Budget Factors, which summarized the entire budget proposal.

Personnel Services

While not the largest expenditure type, personnel expenditures do make up a significant portion of the City of Wauchula's overall budget. Therefore, staff spends considerable time each year reviewing personnel expenses. A quick recap of the factors relating to personnel impacting this proposed budget include:

- Continuing to implement the new step plan for all employees to prepare for the \$15 minimum wage requirement by September 30, 2026. Overall salaries for the proposed budget is \$4.35 million which is a 10.33% increase from current budget
- Individual step raises for employees who are expected to or have achieved certain milestones
- Health Insurance will see a significant change this year. The City is moving from a fully funded structure to a self-funded pool which will decrease the volatility of future rate changes and budget fluctuations. The fully funded renewal was quoted at a 13% increase. Switching to the self-funded pool, we will see an approximate 8.25% increase in premiums.
- Maintaining current Health Savings Account (HSA) contribution levels at \$3,200 for family and \$1,600 for individuals.

- Continued funding of the Employee Wellness Program.
- Workers' compensation premiums increased 20%.
- The required annual contribution to the Pension Fund is 9.34% of payroll. The required OPEB contribution is 0%.

Operating Expenses

Every department is carefully reviewed each year to ensure sufficient funds are budgeted to maintain city & utility operations, while being prudent with taxpayer and rate payer dollars. The following factors are worth noting in operating expenses:

- The budget includes an increase of 20% for automobile liability, and property and casualty liability premiums. This change can be seen across all Funds
- Continuation of the Employee Recognition Program and related funding for such can be seen in both the General Fund (Dept 519-54920) and Utility Fund (Dept 539-54925) at \$2,500 each.
- Continuation of the workstation replacement schedule produced the need for 8 computers and 9 tablets in 11 different departments. The departments include 511, 512, 513, 519, 521, 572, 502, 533, 535, 539, and 593.
- Routine termite tenting of some City facilities will need to take place during FY26. These facilities include 303 W Main Street (former Police Department), 723 Green Street (former Boy Scout Building), and 135 W. Main Street (the Train Depot) and are budgeted at \$23,000 in 519-54620
- Hardware upgrades for IT security and storage have been budgeted in 519-55200 and 539-55200 for a combined \$3,000. This annual replacement budget will keep our IT security hardware up to date and ensure continuous functionality.
- Another \$10,000 is budgeted for the next phase of street name sign replacement throughout the city-limits in 541-54600.
- Lift station liner repairs and a 5HP discharge pump are budgeted in Dept 535-54680 and a new chart recorder and Supervisory Control and Data Acquisition (SCADA) upgrades are budgeted in 535-55200 all totaling \$16,000.
- A new line item in department 535 has been created to account for sludge hauling expenses due to new regulations from FDEP. This is budgeted in 535-55210 for \$125,000.
- Annual recloser replacement for the electric distribution system can be seen in 593-55202 for \$30,000.
- Regular pole inspections are due again in this fiscal year. We have budgeted \$60,000 (593-55268) to inspect all utility poles belonging to the City of Wauchula for treatment and replacement.
- In order to expedite LED street and yard light replacement installation, we have increased this budget to \$70,000 (593-55280)
- There is another employee in the Electric Distribution Department (593-55400) that needs to begin apprentice school starting next fiscal year which is budgeted at \$12,000.

Capital Expenditures

The City continues to invest in our facilities, equipment, vehicles & existing infrastructure. Proposed capital expenditures are approximately \$8.23 million for FY 25-26. The following items are representative of this commitment:

- Vehicles and Equipment
 - As a continuation of our established fleet replacement program, the following replacements have been budgeted for this fiscal year. These can be found in:

- General Fund
 - Dept 521-Police Department
 - 3 Police Vehicles (\$180,000)
 - Dept 572- Recreation
 - 1 Service Body Pick-Up Truck (\$63,000)
 - Zero-Turn Mower (\$19,500)
- Utility Fund
 - Dept 533- Water Distribution
 - Backhoe (\$125,000)
 - Dept 535-WWTP
 - 1 Pick-up Truck (\$50,000)
 - Dept 536- Sewer & Locates
 - Plotter printer for GIS maps (\$6,000)
 - Sewer Camera (\$10,500)
 - Dept 539- Administration
 - Skid Steer (\$125,000)
 - Replace GIS Server (\$6,500)
 - Dept 593- Electric Distribution
 - 1 Bucket Truck (\$280,000)
 - Gooseneck Equipment Trailer (\$20,000)
- Buildings and Other Infrastructure
 - Dept 519- General Administration
 - Public Works Fuel Farm (\$15,350)
 - Dept 541- Roads & Street
 - Downing Circle mill and repave (\$230,000)
 - Hidden Creek Circle Street lighting (\$50,000)
 - Dept 532- Water Treatment Plant
 - Chlorine Analyzer (\$5,200)
 - Dept 533- Water Distribution
 - Water Facilities Plan update (\$75,000)
 - Dept 535- Waste Water Treatment Plant
 - Painting clarifier #2 (\$40,000)
 - Repairing the jockey pump (\$8,000)
 - Dept 536- Sewer & Locates
 - Replace 8-inch Gravity Sewer line between Knollwood and Farr Field lift station (\$450,000)
 - Repair sewer line on Peace Drive (\$40,000)
 - Dept 539- Administration
 - Enclosing additional covered storage (\$25,000)
 - Public Works Fuel Farm (\$15,350)
 - Dept 593- Electric Distribution
 - Spare Relay Breaker (\$6,000)
 - Storm hardening projects (\$100,000)
 - Hardee Crossing Subdivision extension (\$10,000)
 - Capacitor Installation (\$45,000)
 - Annual switch replacement (\$15,000)
 - Dept 534- Sanitation
 - Public Works Fuel Farm (\$15,375)

- Community Redevelopment Agency
 - Infrastructure
 - In-Fill Housing (\$1,245,000)
 - Power Plant Demolition (\$1,000,000)
 - 1st Avenue Water & Sewer (\$200,000)
 - Bay Street Sidewalk (\$26,000)
 - 8th Avenue Sidewalk (\$61,000)
 - 1st Avenue Sidewalk (\$13,000)
 - Farr Field Improvements (\$3,500,000)
 - Heritage Park Electrical (\$70,000)

Debt Service

This year's budget will see a decrease in debt service payments due to the pay-off of 1 loan during FY 24-25. The annual payment reduction is \$33,706.

Grants & Aids

The Wauchula CRA continues to seek public/private partnerships in order to maximize the impact of the Tax Increment Financing funds. In addition, the CRA will set aside \$200,000 in additional funds for new commercial grant projects in FY 25-26. These can be seen in Dept 584-58110. Another partnership which is equally vital to the CRA, is through an interlocal agreement with Hardee County. This agreement allows the CRA to fund public relations, administered by the Main Street Wauchula organization, to support marketing, the arts, and community events held in the CRA district. This funding is seen in Dept 584-58220.

Other Uses

Transfers & Contingency

The city makes effort each year to build contingency into the budget for unexpected expenses. The proposed budget includes \$2,967 in contingency in the General Fund. The increased level of service in our Parks and Recreation department, the City's need to stay competitive in an ever-growing job market, and infrastructure maintenance requirements have stretched the General Fund to this point. Additionally, Utility Fund and Sanitation Funds include \$153,088 and \$23,898 respectively in contingency.

The total transfer to the General Fund from the Utility & Sanitation Funds increased by \$73,740, which is less than a 4% increase from current FY. General Fund administration supports the enterprise funds as well, and while expenses continue to increase in the General Fund the revenues to help support those expenses do not increase at the same rate.

Grant Funded & Potential Projects (Not in proposed budget)

Staff has found it more efficient to match grant funded project expenses with their relative revenue as they occur. Therefore, the following projects are expected to be in process during FY 25 -26 and be funded with grant funds.

Project	Purpose	Grant Agency	Amount
Alabama Street Roadway Improvements	Resurfacing of Alabama Street between N. Ohio Avenue and N. Florida Avenue, approximately .243 miles.	Florida Department of Transportation (FDOT)- Small Counties Outreach Program (SCOP)	\$359,888

Tennessee Street Roadway Improvements	Resurfacing of Tennessee St, between N. Ohio Avenue and North Florida Avenue, approximately .243 miles associated safety improvements will also be addressed, as appropriate.	Florida Department of Transportation (FDOT)- Small Counties Outreach Program (SCOP)	\$455,509
Oak Street, Bay Street, and/or Palmetto Street Roadway Improvements	Resurfacing as much of Oak , Bay and Palmetto Streets as funds will allow.	Housing and Urban Development (HUD)	\$2,000,000
Hogan Street Extension	Extend Hogan Street to connect North and Southbound Highway 17.	Florida Department of Commerce	\$441,125
Senior Center	Design and construct a new ADA compliant senior center	Legislative Appropriation (LP) FY 25-26	\$3,000,000
Restroom Improvements	Update restroom facility at Heritage Park	Legislative Appropriation (LP) FY 25-26	\$500,000
Power Plant Demolition	Demolition and site improvements at old power plant	Legislative Appropriation (LP) FY 25-26	\$4,000,000
Auditorium Safety Improvements	Upgrade current facility to include ADA accessibility, sprinkler system, fire rated curtain, upgraded rope and weight fly system, and lighting upgrades	Legislative Appropriation (LP) FY 25-26	\$2,500,000
Runway and Taxiway Extension	Feasibility and environmental studies, design and construction of a runway and taxiway extension to allow for safe landing & take-off of medium sized jet aircraft.	Florida Department of Transportation (FDOT) and Legislative Appropriation (LP) FY 23-24 & FY 24-25	FDOT Grant- \$450,000 LP#1- \$4,000,000 LP#2- \$5,500,000
T-Hangar	Design and construct an additional multi-unit T-Hangar	Legislative Appropriation (LP) FY 23-24	\$2,500,000
Rotating Beacon & Tower	Design and construction of a rotating beacon and tower at the airport.	Florida Department of Transportation (FDOT)	\$325,000
Airport Terminal Building	Design and construct a new airport terminal/pilot's lounge.	Legislative Appropriation (LP) FY 25-26	\$1,750,000

Municipal Airport Deep Well	Install a new deep well to support economic development to include fire suppression capabilities	Legislative Appropriation (LP) FY 25-26	\$1,332,938
T-Hangar	Design and construct an additional multi-unit T-Hangar	Legislative Appropriation (LP) FY 25-26	\$5,000,000
Southwest Area Elevated Water Tower	Design and construction of a third elevated water tower in the southwest area of the county	Legislative Appropriation (LP) FY 23-24	\$8,212,789
Heard Bridge Waterline Loop	Extend the waterline on Heard Bridge Road north to REA Road and west to Highway 17, looping the main water system	Hardee County Economic Development Authority (EDA)	\$1,000,000
Advanced Metering Infrastructure (AMI)	Design and implement an advanced metering infrastructure system for electric and water meters city-wide	Legislative Appropriation (LP) FY 23-24	\$4,750,000
Public Works Fuel Farm	Install a storm hardened fuel station for the Public Works departments.	Florida Department of Emergency Management-Hazard Mitigation Grant Program (FDEM-HMGP)	HMGP-\$138,225 City Match-\$46,075
Administration Building and WWTP Generators	Installation of 3 back-up generators at the Administration and Police Department Building, WWTP Control Chamber and WWTP Control Room.	Florida Department of Emergency Management-Hazard Mitigation Grant Program (FDEM-HMGP) and Florida Department of Commerce	HMGP-\$506,546 FL Dept of Commerce-\$23,672
Public Safety Hardened Facility	Hardened facility to expedite public safety measures aiding in restoration after disasters	Legislative Appropriation (LP) FY 25-26	\$5,000,000

Braxton reviewed the overall city-wide budget and discussed expenditure types, personnel salaries/benefits, fund balance, debt service and ad valorem tax.

Nadaskay recessed the budget workshop at 5:46 pm in order to hold the City Commission meeting that was scheduled at 6:00 pm.

Nadaskay reconvened the budget workshop at 7:53 pm.

Eason discussed the general fund and community redevelopment agency fund.

Grimes discussed the airport fund, utility fund and sanitation fund.

With no further business to discuss, Nadaskay adjourned the Budget Workshop at 9:34 p.m.

Mayor Richard K. Nadaskay, Jr

City Clerk Stephanie Camacho



CITY COMMISSION AND CRA BOARD MEETING MINUTES

Monday, July 14, 2025 at 6:00 PM

Historic City Hall, Commission Chambers – 225 East Main Street, Suite 105

www.cityofwauchula.gov

INVOCATION

PLEDGE OF ALLEGIANCE

CALL TO ORDER

Nadaskay called the meeting to order at 6:00 pm.

ROLL CALL

PRESENT

Commissioner Anne Miller
Mayor Pro Tem Russell Smith
Mayor Keith Nadaskay
Commissioner Sherri Albritton
Commissioner Gary Smith

STAFF PRESENT

City Manager Olivia Minshew
Deputy City Manager John Eason
Assistant City Manager Sandee Braxton
Community Development Director Kyle Long
Assistant Chief of Police Tom Fort
Director of Projects and Procurement Ward Grimes

APPROVAL OF AGENDA

Motion made by Commissioner Albritton, Seconded by Commissioner Miller.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner G. Smith

MINUTES FOR APPROVAL

1. Minutes for May 5, 2025 Workshop, May 12, 2025 Meeting, June 2, 2025 Workshop, and June 9, 2025 Meeting

Recommended Action: Commission's Approval

Motion made by Commissioner G. Smith, Seconded by Commissioner Albritton.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

PUBLIC COMMENT / NON-AGENDA ITEMS

None presented.

ORDINANCES / PUBLIC HEARINGS

2. Ordinance 2025-04 FLU Map Amendment for Hardee County BOCC Property on US Highway 17 – Second Reading – Public Hearing

Recommended Action: Commission's Approval

Nadaskay opened the public hearing.

Mark Gilliard - 932 Heardbridge Rd Wauchula, FL

Gilliard thanked the Commission for taking time to discuss and listen to his feelings regarding this project. Gilliard further explained that he felt like there should have been a committee implemented by the County, as well as community involvement, before moving forward with the decisions surrounding this project. Gilliard recommended a 60 days pause to gather more information and considerations.

Grant Bonds - 1002 Saunders Ln Wauchula, FL

Bonds stated his father previously owned a business in the area where the current Sheriff's Office is located. Bonds recalled increased traffic and other negative impacts on the neighbors when the office was put in there. He stated he believed there were other options that could be considered.

Ruben Rivas - 1347 Tustenugee Trl Wauchula, FL

Rivas stated he was against this zoning request and also suggested a 60 day pause to look more into the project options.

Tim Wells - 398 Bostick Rd Bowling Green, FL

Wells stated he did not live in the area affected by this project however, he did not feel like this was the best use of the land and thought it would be better served as a use that could generate a tax base within the County. He agreed that a new Sheriff's Office was needed but thought a different location should be considered.

Donald Chancey - PO Box 845 Wauchula, FL

Chancey stated he was in agreeance that a new Sheriff's Office complex was necessary however, he believed a site evaluation committee needed to be formed in order to evaluate different site locations in order to find the best site for this project.

With no further discussion from the public, Nadaskay closed the public hearing.

Hatcher-Bolin read the ordinance by title.

For the purpose of opening discussion, R. Smith approved the motion, seconded by Albritton.

The Commission inquired about the County's timeline, considering the option to delay this item.

Atchley explained where they were in the process and the deadlines for the grant agreements.

Discussion was at length. It was the consensus of the Commission to delay voting on this item until the October 13, 2025 meeting and, in that time, a committee was to be formed.

R. Smith motioned to amend his vote and to table this ordinance until the October 13, 2025 Commission meeting, seconded by Albritton.

Voting yea: Commissioner Miller, Mayor Nadaskay, Commissioner G. Smith

Motion to approve the amended motion made by Mayor Pro Tem R. Smith, Seconded by Commissioner Miller.

Voting Yea: Mayor Nadaskay, Commissioner Albritton, Commissioner G. Smith

3. Ordinance 2025-11 Annexation of 572 Stenstrom Rd - First Reading

Recommended Action: Commission's Approval

Hatcher-Bolin read the ordinance by title.

Motion made by Commissioner Albritton, Seconded by Commissioner G. Smith.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

CITY MANAGER / NON-CONSENT

4. Power Cost Adjustment

Minshew announced the June power cost adjustment.

5. Proclamation 2025-05 First Responder Appreciation Day

Recommended Action: Commission's Approval

Tim Staton presented the proclamation to the Commission.

Motion made by Commissioner G. Smith, Seconded by Commissioner Albritton.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

6. Resolution 2025-10 Adopting the 2025 Hardee County Multi-Jurisdictional Local Mitigation Strategy Plan

Full LMS plan available at: <https://www.hardeecountyfl.gov/departments-services/public-safety/emergency-management/>

Recommended Action: Commission's Approval

Lane Schneider - Hardee County Emergency Management

Schneider addressed the Commission and explained the resolution, which would make it possible for the City to receive certain types of emergency and nonemergency disaster assistance through federal funding.

Motion made by Commissioner Albritton, Seconded by Commissioner Miller.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner G. Smith

7. Resolution 2025-11 Setting the Proposed Millage Rate for 2025-2026 FY

Recommended Action: Commission's Discretion

Minshew explained the 2025-2026 budget was balanced using the rollback rate of 5.0794 at the budget workshop however they added that rate may not be the most viable number considering the proposed budget was utilizing fund balance for certain projects/purchases. Braxton presented several options that Commission could consider, explaining they could advertise a higher millage rate for the property appraiser's TRIM notice but then lower it at the final budget hearing, if they so choose. Minshew stated staff was not recommending a rate higher than 8%. The Commission discussed the options.

Motion made by Mayor Pro Tem R. Smith to set the proposed millage rate to 6.5 mills, Seconded by Commissioner Albritton.

Voting Yea: Commissioner Miller, Mayor Nadaskay

Voting Nay: Commissioner G. Smith

8. Designation of a Voting Delegate for the 2025 FLC Annual Conference

Recommended Action: Commission's Discretion

Nadaskay recommended designating Minshew as the voting delegate, as she was planning to attend the conference.

Motion made by Commissioner Albritton to designate Minshew as the voting delegate, Seconded by Commissioner G. Smith.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

CONSENT AGENDA

9. Resolution 2025-09 FDOT Supplemental Agreement - Tennessee Street

10. ITN 25-01 Self Insured Pools Bid Recommendation

11. Fund Balance Request for Tennessee & Alabama Paving Projects

12. ITB 25-01 Award Recommendation

13. ITB 25-02 Award Recommendation
14. RFQ 25-01 CEI Services - Alabama Street Resurfacing Project
15. RFQ 25-02 CEI Services - Tennessee Street Resurfacing Project

Recommended Action: Commission's Approval on Items 9-15

Motion made by Commissioner Albritton, Seconded by Mayor Pro Tem R. Smith.

Voting Yea: Commissioner Miller, Mayor Nadaskay, Commissioner G. Smith

CITY ATTORNEY REPORTS

No report.

CITY MANAGER REPORT

Report given.

CITY COMMISSIONER REPORTS

No report.

RECESS COMMISSION MEETING – CONVENE CRA BOARD MEETING

CRA AGENDA

16. Approval of Minutes for May 12, 2025 Meeting, June 2, 2025 Workshop, and June 9, 2025 Meeting

Recommended Action: Board's Approval

Motion made by Commissioner Miller, Seconded by Commissioner G. Smith.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner Albritton

17. TIF Program Extension Request - 312 Diana Ave Project
Requesting to extend from July 1, 2025 to September 1, 2025

Recommended Action: Board's Approval

Motion made by Commissioner Miller, Seconded by Commissioner G. Smith.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner Albritton

18. Florida Voluntary Cleanup Tax Credits Agreement

Recommended Action: Board's Approval

Motion made by Commissioner Miller, Seconded by Commissioner Albritton.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner G. Smith

ADJOURN CRA BOARD MEETING – RECONVENE COMMISSION MEETING

19. Approval of CRA Board's Actions

Recommended Action: Commission's Approval

Motion made by Commissioner G. Smith, Seconded by Commissioner Albritton.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

REMINDERS

ADJOURNMENT

With no further business to discuss, Nadaskay adjourned the meeting at 7:43 pm.

Mayor Richard K. Nadaskay

City Clerk Stephanie Camacho

ORDINANCE NO. 2025-07

AN ORDINANCE OF THE CITY OF WAUCHULA, FLORIDA; PROVIDING FOR AN AMENDMENT TO THE FUTURE LAND USE MAP OF THE CITY OF WAUCHULA, FLORIDA, SPECIFICALLY CHANGING THE FUTURE LAND USE CLASSIFICATION FROM PUBLIC/SEMI-PUBLIC (PSP) TO COMMERCIAL ON APPROXIMATELY 2.27 ACRES LOCATED AT 1001 NORTH 6TH STREET, NORTH OF BELL STREET, (PARCEL NUMBERS 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000), AS IDENTIFIED IN EXHIBIT "A" HEREOF; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, Sections 163.3161 through 163.3215, Florida Statutes, the Local Government Comprehensive Planning and Land Development Regulation Act, empowers and mandates the City of Wauchula, Florida, (the "City") to plan for future development and growth and to adopt and amend comprehensive plans, or elements or portions thereof, to guide the future growth and development of the City; and

WHEREAS, pursuant to Section 163.3184, Florida Statutes, the City Commission held meetings and hearings on **Amendment 25-02SS**, with due public notice having been provided, to obtain public comment, and considered all written and oral comments received during public hearings, including support documents; and

WHEREAS, in exercise of its authority the City Commission has determined it necessary to adopt this **Amendment 25-02SS** to the Comprehensive Plan, which map is marked as Exhibit "A" and is attached and made a part hereof, to ensure that the Plan is in full compliance with the Laws of the State of Florida; to preserve and enhance present advantages; encourage the most appropriate use of land, water, and resources consistent with the public interest; and deal effectively with future problems that may result from the use and development of land within the City of Wauchula; and

WHEREAS, in accordance with the procedures required by Sections 166.041 (3)(c)2, Florida Statutes, and other applicable law, the regulations contained within this ordinance were considered by the City's Planning and Zoning Board, sitting as the Local Planning Agency (LPA) as designated by the City, at a duly advertised public meeting on July 21, 2025, at which time interested parties and citizens had the opportunity to be heard and such amendments were recommended to the City Commission for adoption; and

WHEREAS, pursuant to Section 163.3184, Florida Statutes, the Commission held a meeting and hearing on this amendment, with due public notice having been provided, to obtain public comment, and considered all written

and oral comments received during public hearings, including support documents.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF WAUCHULA, FLORIDA, AS FOLLOWS:

Section 1. AMENDMENT TO THE FUTURE LAND USE MAP. the Commission of the City of Wauchula, Florida, amends its Comprehensive Plan in the following specific manner:

The Future Land Use Map is amended to specifically change the Future Land Use Classification from Public/Semi-Public to Commercial on two parcels of land containing approximately +/-2.27 acres located at 1001 North 6th Avenue, north of Bell Street, (Parcel Numbers 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000) and shown on the Proposed Future Land Use Map attached as Exhibit "A".

Section 2. RECITALS. The provisions set forth in the recitals to this Ordinance (whereas clauses) are hereby adopted by the Commission as the legislative findings and intent pertaining to this Ordinance.

Section 3. SEVERABILITY. If any section, subsection, sentence, clause, or phrase of this Ordinance is, for any reason held to be unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance. The City of Wauchula, Florida, hereby declares that it would have passed this Ordinance, and each section, subsection, clause, or phrase thereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses, and phrases be declared unconstitutional.

Section 4. CONFLICTS. All ordinances in conflict herewith are hereby repealed to the extent necessary to give this Ordinance full force and effect, provided however, that nothing herein shall be interpreted so as to repeal any existing ordinance or resolution relating to means of securing compliance with the City's Code of Ordinances and Unified Land Development Code (ULDC), unless such repeal is explicitly set forth herein.

Section 5. EFFECTIVE DATE. The ordinance shall take effect as provided for in 163.3187(5)(c), Florida Statutes.

INTRODUCED AND PASSED on first reading in regular session of the City Commission of the City of Wauchula, the ____ day of ____, 2025.

PASSED on second and final reading by the City Commission of the City of Wauchula, Florida, at regular session this ____ day of ____, 2025.

This ordinance was moved for adoption by Commissioner _____.
The motion was seconded by Commissioner _____, and upon being put to a vote, the vote was as follows:

Commissioner Anne Miller _____	insert yes or no
Commissioner Russell Graylin Smith _____	insert yes or no
Commissioner Keith Nadaskay, Jr _____	insert yes or no
Commissioner Dr. Sherri Albritton _____	insert yes or no
Commissioner Gary Smith _____	insert yes or no

(SEAL)

ATTEST:

APPROVED:

Stephanie Camacho, City Clerk

Richard Keith Nadaskay, Jr., Mayor

APPROVED AS TO FORM AND LEGALITY:

Thomas A. Cloud, City Attorney



**CITY OF WAUCHULA
FUTURE LAND USE AND ZONING AMENDMENT
STAFF REPORT & PROPOSED AMENDMENTS**

TO: City of Wauchula City Commission

PREPARED BY: Central Florida Regional Planning Council

AGENDA DATE: September 8, 2025

SUBJECT: FUTURE LAND USE MAP AMENDMENT:

An applicant-initiated request to amend the **Future Land Use classification** from Public/Semi-Public to Commercial on two parcels of land containing approximately +/-2.27 acres located at 1001 North 6th Avenue, north of Bell Street, (Parcel Numbers 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000).

REZONING:

An applicant-initiated request to amend the **Zoning Map** from Public/Semi-Public (P/SP) to C-2 Highway Commercial/ Light Manufacturing on two parcels of land containing approximately +/-2.27 acres located at 1001 North 6th Avenue north of Bell Street, (Parcel Numbers 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000).

AGENDA AND HEARING DATES:

August 18, 2025, 5:30 PM Planning and Zoning Board (Public Hearing)
September 8, 2025, 6:00 PM City Commission (First Reading)
 October 13, 2025, 6:00 PM City Commission (Second Reading, Public Hearing)

ATTACHMENTS:

- Aerial Photo Map
- Existing Future Land Use Map
- Proposed Future Land Use Map
- Existing Zoning Map
- Proposed Zoning Map
- Property Owner Notice letter (sent to surrounding property owners w/in 300 feet)
- Applications (Comprehensive Plan Map Amendment & Rezoning)

PLANNING AND ZONING BOARD MOTION

On September 18, 2025 the Planning and Zoning Board voted unanimously to forward the proposed Future Land Use Map Amendment and rezoning to the City Commission with recommendations of approval.

CITY COMMISSION MOTION OPTIONS (FIRST READING):

Future Land Use Map Amendment Motion Options:

1. *I move approval of Ordinance 2025-07 on First Reading.*
2. *I move approval of Ordinance 2025-07 on First Reading with changes.*
3. *I move continuation to a date and time certain.*

Rezoning Motion Options:

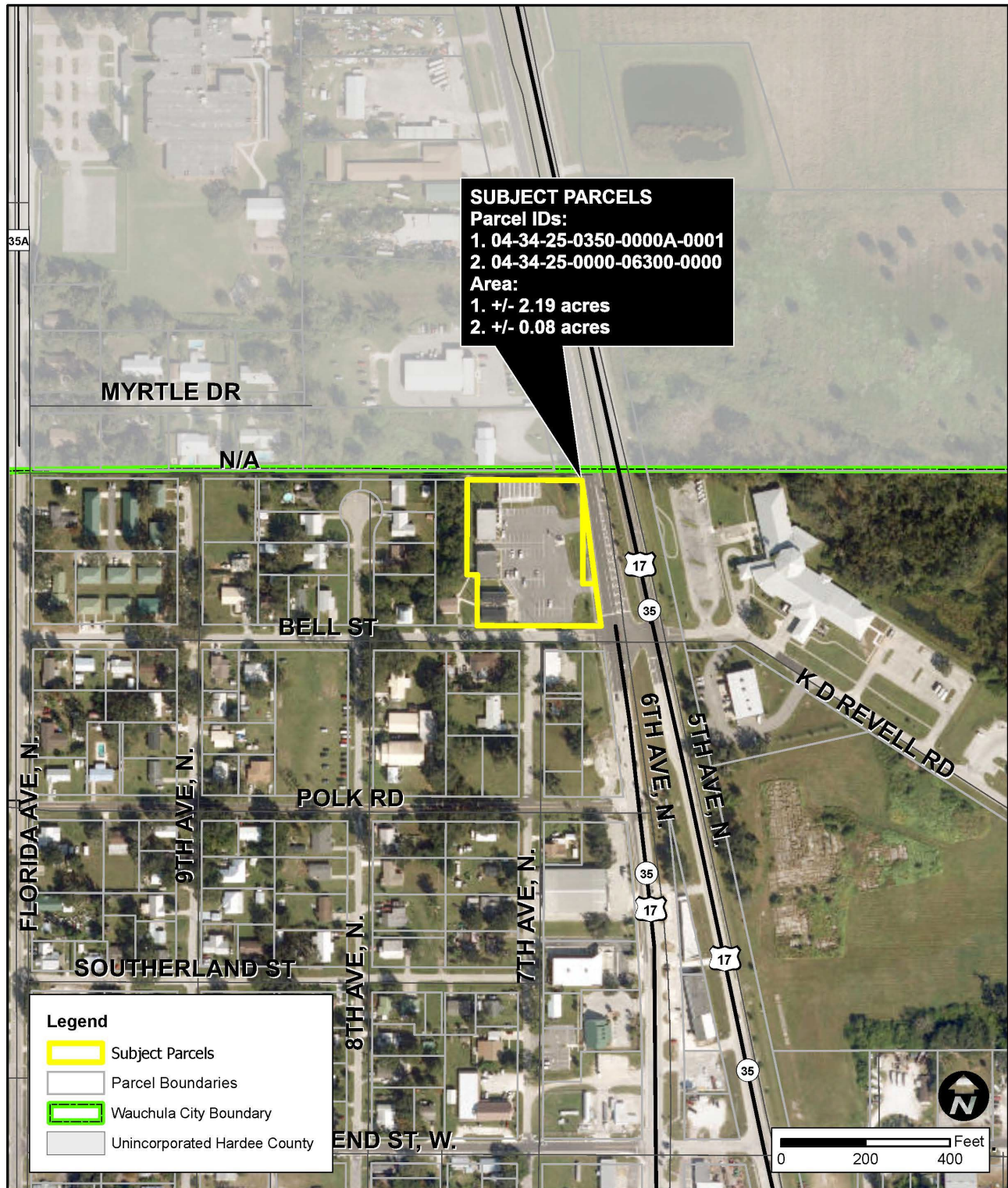
1. *I move approval of Ordinance 2025-08 on First Reading.*
2. *I move approval of Ordinance 2025-08 on First Reading with changes.*
3. *I move continuation to a date and time certain.*

OVERVIEW:

Applicant	Hardee County School Board
Property Owner (1)	Hardee County School Board
Parcel ID (1)	04-34-25-0350-0000A-0001
Property Owner (2)	The Stockyard Property Group, LLC
Parcel ID (2)	04-34-25-0000-06300-0000
Total Subject Area	+/-2.27 acres
Existing Future Land Use	Public/Semi-Public
Proposed Future Land Use	Commercial
Existing Zoning	Public/Semi-Public
Proposed Zoning	C-2, Highway Commercial/Light Manufacturing

The Hardee County School Board and the Stockyard Property Group, LLC (applicants) are requesting the amendment of a City of Wauchula Future Land Use and Zoning designation on two parcels totaling +/-2.27-acres. The request is to amend the Future Land Use designation from Public/Semi Public to Commercial and to amend the zoning from Public/Semi-Public to Highway Commercial/Light Manufacturing (C-2) ay Commercial/Light Manufacturing to both parcels. The reason for this request is that the School Board plans to sell Parcel 1 and designating both parcels with a commercial FLU and zoning will enhance their marketability to potential buyers. See aerial photo map below.

City of Wauchula Aerial Photo Map



FUTURE LAND USE REQUEST

The applicants are requesting a Future Land Use Map amendment from Public/Semi-Public to Commercial. Descriptions for both the existing and proposed Future Land Use categories are provided as follows.

EXISTING FUTURE LAND USE - Public/Semi-Public

City of Wauchula Comprehensive Plan, Future Land Use Element, Policy 1.6(h)

This category includes local government buildings, educational facilities, hospitals, and other public and semi-public properties which are accessible to all citizens, compatible adjacent land uses and the environment, and promote the efficient use of infrastructure. Compatible public land uses are permissible within all land use designations. The floor area ratio of public buildings shall not exceed 2.0.

PROPOSED FUTURE LAND USE - Commercial

City of Wauchula Comprehensive Plan, Future Land Use Element, Policy 1.6(e)

This category permits Single Family Residential, Low Density Residential, retail activity, wholesaling, light manufacturing and offices. The land development regulations shall ensure that these establishments are compatible with surrounding uses. The floor area ratio in the **Commercial** category shall not exceed 3.0.

ZONING REQUEST

The applicants are requesting a Zoning Map amendment from City Public/Semi-Public (P/SP) to C-2 Highway Commercial/Light Manufacturing. Descriptions for both the existing and proposed Zoning categories are provided as follows.

EXISTING ZONING

City of Wauchula Land Development Code, Section 2.02.02.13(B) - P/SP Public/Semi Public Buildings and Grounds

To identify local government buildings, educational facilities, hospitals, and other public and semi-public buildings and grounds, which are accessible to all citizens, compatible with adjacent land uses and the environment, and promote the efficient use of infrastructure. Properties which are publicly owned and open to recreational use by the public are included in this category. It encompasses sports facilities, and city, county, and state owned parks.

PROPOSED ZONING

City of Wauchula Land Development Code, Section 2.02.02.11(B) - C-2 Highway Commercial/Light Manufacturing

The purpose of this district is to provide areas for a variety of commercial and

light industrial uses that generate a high volume of traffic, have large parking needs or must be located on a highway, including retail commercial uses, light industrial uses, highway business uses, and other business establishments that are clean, quiet, and free of hazardous or objectionable elements such as noise, odor, dust, smoke, or glare as well as low density single-family and multi-family residential uses interspersed with the commercial and light industrial uses.

PROPERTY INFORMATION

The request includes two parcels totaling approximately +/-2.27 acres. The property has a Future Land Use designation of Public/Semi-Public and a zoning designation of Public/Semi-Public (PSP). The Hardee County School Board is requesting the City assign a Future Land Use designation of Commercial and a zoning of C-2 Highway Commercial/Light Industrial on both parcels to aid in the eventual sale of the parcels.

ANALYSIS:

SURROUNDING PROPERTIES:

As illustrated in the table below, the property is surrounded by commercial, public, residential and agricultural uses. The property to the south is in Wauchula and the property to the north, northwest and northeast are in unincorporated Hardee County.

<u>Northwest:</u> FLU: County TCN Zoning: County C-2 Use: Commercial	<u>North:</u> FLU: County TCN Zoning: County C-2 Use: Commercial	<u>Northeast:</u> FLU: County TCN Zoning: County A-1 Use: Agriculture
<u>West:</u> FLU Low Density Residential Zoning: R-2 Use: Residential	<u>Subject Properties:</u> Current FLU: PSP Requested FLU: Commercial Current Zoning: PSP Requested Zoning: C-2 Use: School Board Uses and Vacant	<u>East:</u> FLU: PSP Zoning: PSP Use: Public Buildings
<u>Southwest:</u> FLU: Low Density Residential Zoning: R-2 Use: Residential	<u>South:</u> FLU: Low Density Residential and Commercial Zoning: R-2 and C-2 Use: Residential and Commercial	<u>Southeast:</u> FLU: Industrial Zoning: Industrial Use: Vacant and Commercial

LAND USE IMPACTS ANALYSIS:

The proposed Future Land Use, is compatible with the Comprehensive Plan conditions and is compatible with the surrounding area based on the Future Land Uses assigned to nearby properties in the City limits along 6th Street (US Highway 17).

The table below shows the density/intensity for the amendment to the Zoning Map request for the property.

	Existing Zoning: City P/SP	Proposed Zoning: C-2 Highway Commercial
Density/Intensity	1.0 FAR	C-2: 3.0 FAR
Density Potential	1.0 FAR	0.75 DU/Ac

The proposed Future Land Use is compatible with the surrounding area based on the Future Land Uses assigned to nearby properties in the City limits. The proposed zoning is compatible with the companion Future Land Use request. More information is available in the Land Use Analysis located below.

PUBLIC FACILITIES AND SERVICES ANALYSIS:

Potable Water and Wastewater

The City has capacity in both systems to serve development of this property. The applicant will be responsible for connections to the City's systems.

Traffic/Transportation

The site is bordered by North 6th Avenue (US Highway 17) on the west and Bell Street on the south. US Highway 17 is a state-maintained road. Currently, there are two driveways onto US Highway 17, if additional driveways are desired in the future, the applicant will need to contact the Florida Department of Transportation.

Environmental Impacts

According to the FEMA FIRM maps no portion of the site is located in a FEMA Flood Zone.

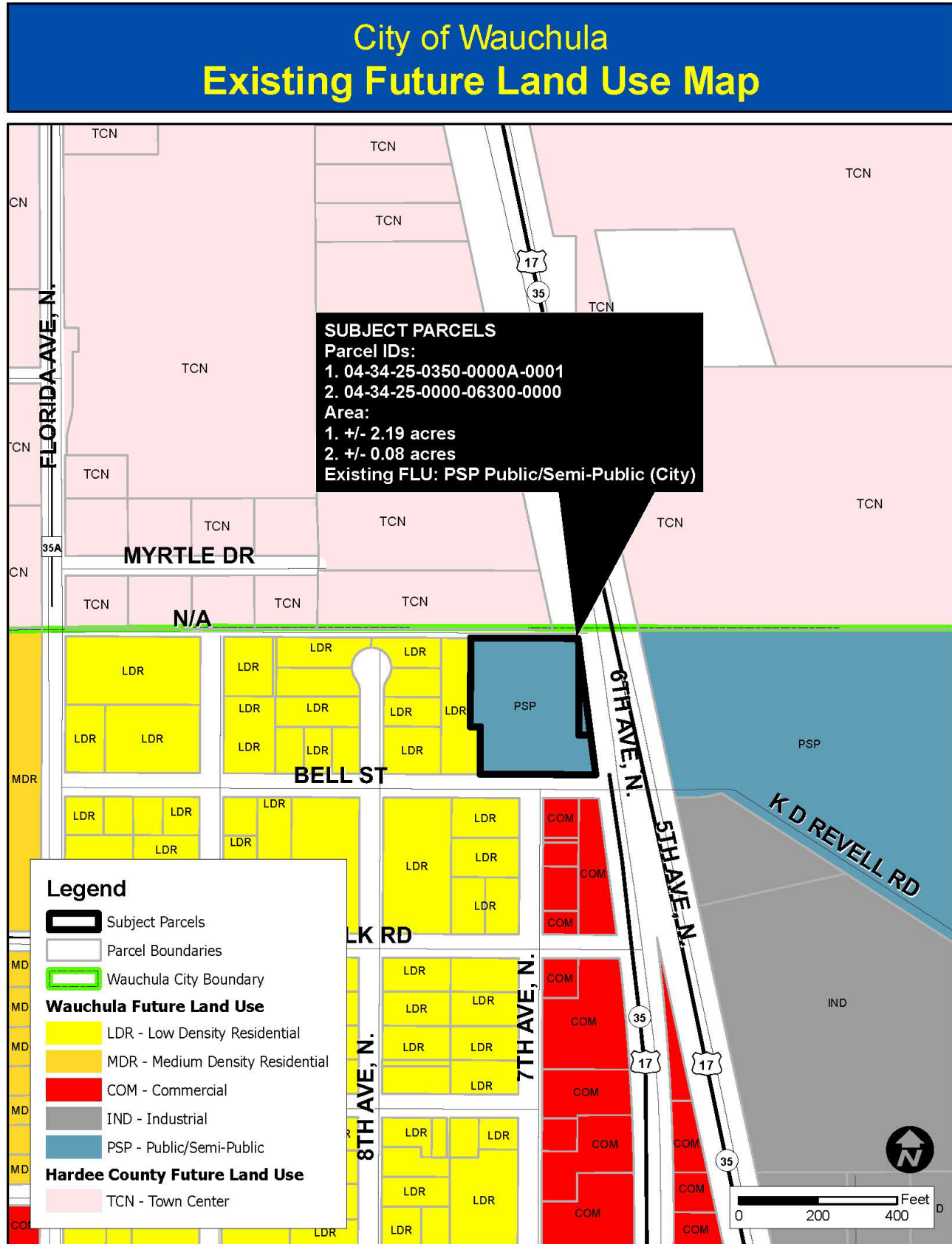
School Impacts

The requested Future Land Use and Zoning does permit the development of residential developments. If residential development is proposed in the future then coordination with Hardee County Schools will be required to determine the proposed impacts to schools.

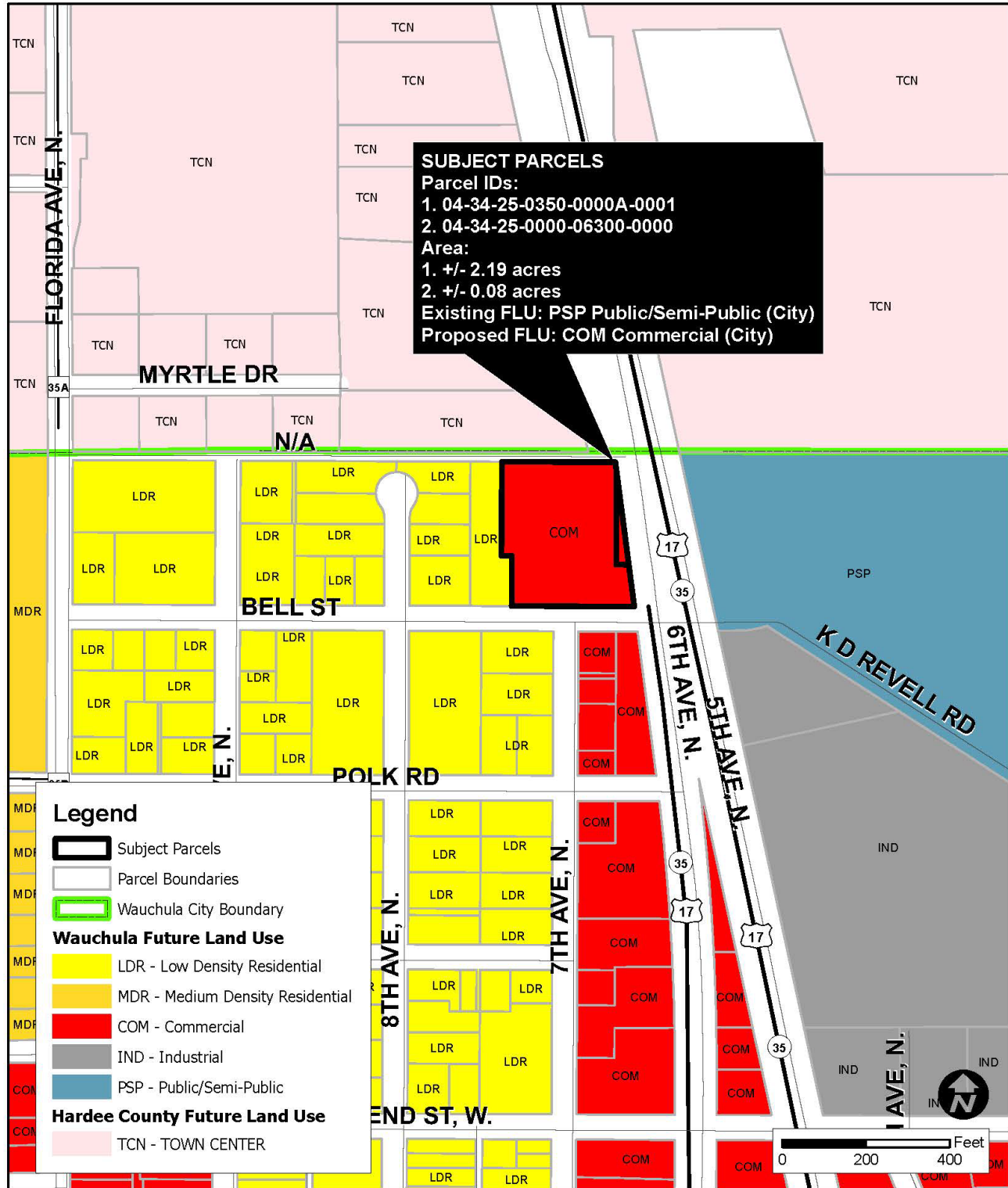
CONSISTENCY WITH THE COMPREHENSIVE PLAN:

The Future Land Use Map amendment is **consistent** with the City of Wauchula Comprehensive Plan. The change in Future Land Use for the property will permit the property owner to utilize the parcels for commercial or, potentially, residential purposes.

The Zoning amendment is **consistent** with the proposed Future Land Use Map amendment.

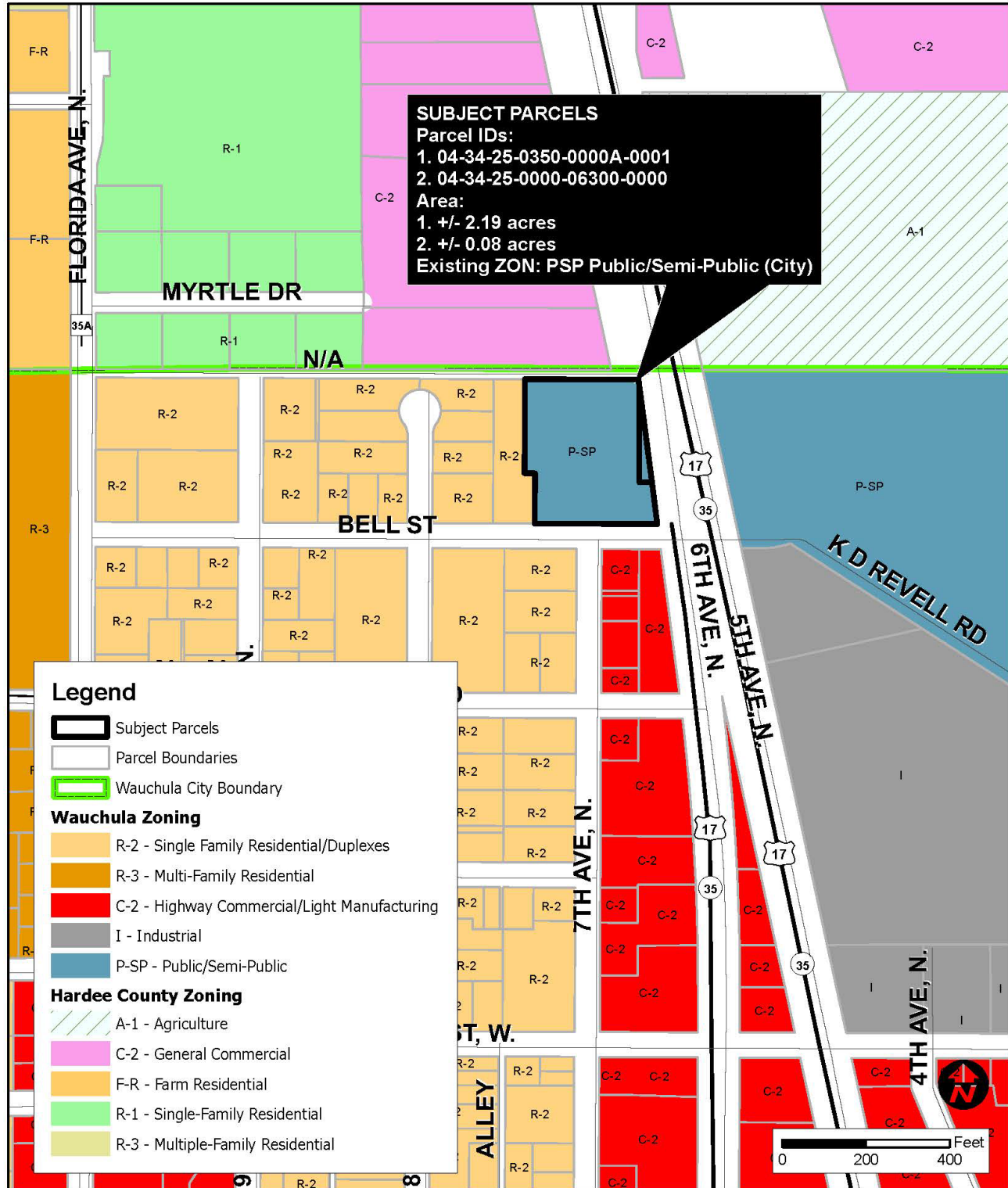


City of Wauchula Proposed Future Land Use Map

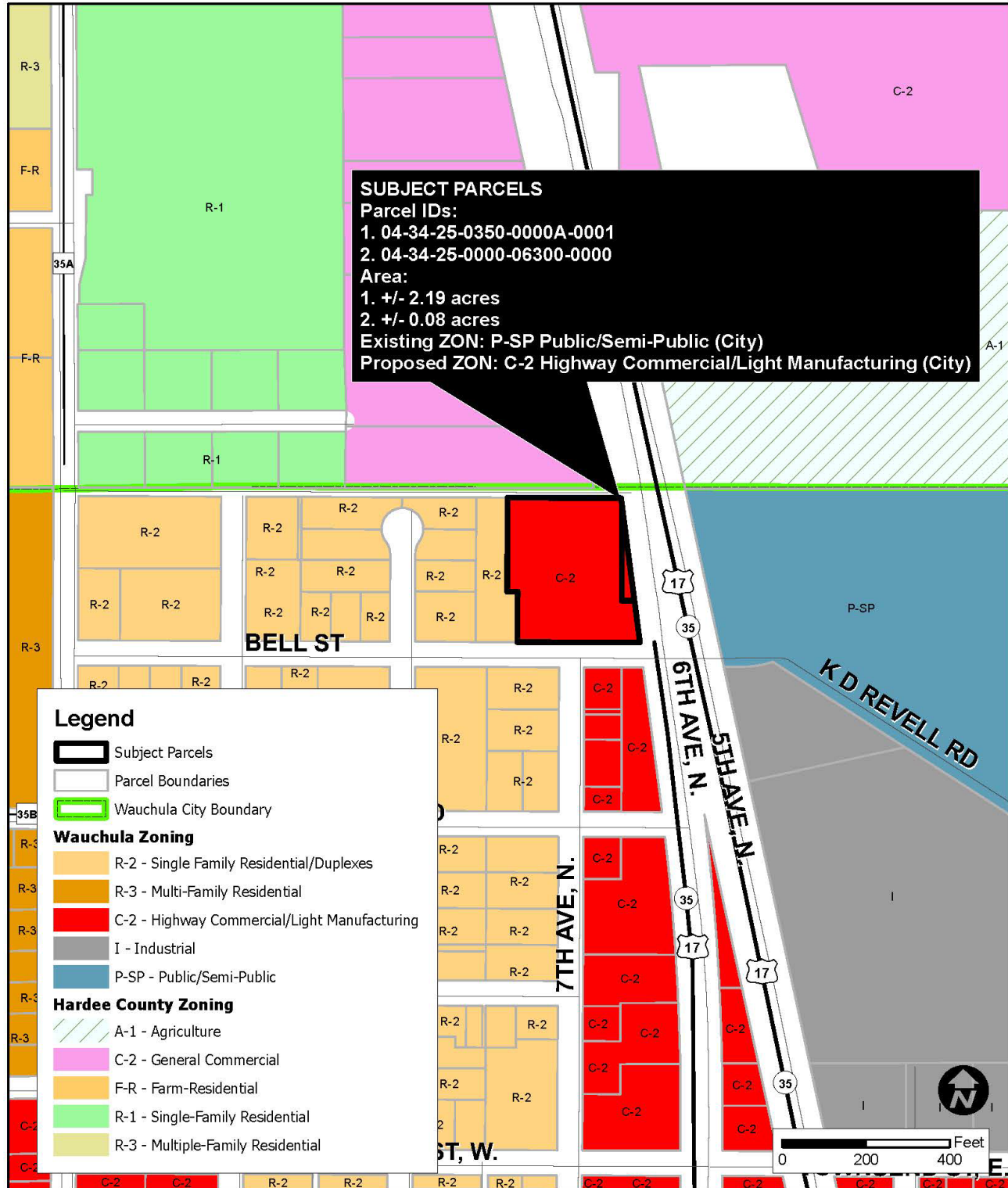


Document Path: D:\Projects\Hardee\Wauchula\Maps2025\1001NS\HardeeSchoolBoard\1001NS\HardeeSchoolBoard.aprx

City of Wauchula Existing Zoning Map



City of Wauchula Proposed Zoning Map



School Board Property Application

FILL OUT COMPLETELY

Date Submitted _____

CITY OF WAUCHULA

☐ SPECIAL EXCEPTION ☐ VARIANCE ☐ ANNEXATION
☒ RE-ZONE ☒ FUTURE LAND USE AMENDMENT
☐ SUBDIVISION PLAT ☐ ALLEY CLOSURE

A SITE PLAN, TO SCALE, IS NEEDED FOR ALL REQUESTS.
A METES AND BOUNDS SURVEY IS NEEDED FOR AN ANNEXATION.
IF YOU LIVE IN A DEED RESTRICTED COMMUNITY, YOU MUST
PROVIDE A COPY OF THE DEED RESTRICTIONS.

Applicant: School Board of Hardee CountyAddress of request: 1001 N. 6th AvenueMailing address: P.O. Drawer 1678Daytime Telephone: 863-773-9058
 Owner's Name & Address (as shown on property records):
☐ Check, if same as above.

If different: Name: _____

Mailing Address: _____

Daytime Telephone: _____

NOTE : IF THE APPLICANT IS NOT THE OWNER OF THE ABOVE PROPERTY,
 WRITTEN CONSENT BY THE OWNER MUST BE SUPPLIED BY THE
 APPLICANT AT THE TIME OF SUBMITTAL TO THE CITY'S PLANNING
 AND ZONING DEPARTMENT. ALL REQUESTS MAY ONLY BE
INITIATED BY THE CURRENT PROPERTY OWNER.

Legal description: See attached property cardCurrent Zoning P-SP Future Land Use C2Size of Parcel: 2.165 acreage

Current Improvements: (Buildings, etc. on property) _____

Reason for request: sale of property

If Annexation and/or Re-Zone:

Current County Zoning Classification _____

City Zoning Classification and Future Land Use classification sought: _____

C 2What property usage is to the North: commercial, South: C-2-,East: P-SP - Health Dept. and West: R2 - single family of your property (example: residence)?Number of residences on parcel(s) (Existing and/or proposed): NA

Population of parcel(s): _____

*****FOR SPECIAL EXCEPTION REQUESTS ONLY*****

Square footage to be used for the activity: _____

Proposed Hours: _____

Associated Noise: _____

Materials stored on premises: _____

Traffic caused by activity: _____

Number of off-street parking spaces: _____

Have you filed any previous applications? NO

If yes, please describe request and give date of application: _____

I have read and understand the requirements of the application and agree to pay all costs of the process.
The typical total cost is between \$150.00 and \$300.00.

Signature(s): Sony M. Bennett Date: 4/11/2025

Print Name(s): SONJA M. BENNETT

Signature of applicant(s): _____ Date: _____

Print Name(s): _____

FOR OFFICE USE ONLY

___ Application	_____	
___ Ad	_____	
___ Copies	_____	(.15 ea single sided)
		(.20 ea double sided)
___ Postage	_____	
		Total Due _____

Stockyard Property Application

FILL OUT COMPLETELY

Date Submitted

5/28/25

CITY OF WAUCHULA

☐ SPECIAL EXCEPTION ☐ VARIANCE ☐ ANNEXATION
☒ RE-ZONE ☒ FUTURE LAND USE AMENDMENT
☐ SUBDIVISION PLAT ☐ ALLEY CLOSURE

A SITE PLAN, TO SCALE, IS NEEDED FOR ALL REQUESTS.
A METES AND BOUNDS SURVEY IS NEEDED FOR AN ANNEXATION.
IF YOU LIVE IN A DEED RESTRICTED COMMUNITY, YOU MUST
PROVIDE A COPY OF THE DEED RESTRICTIONS.

Applicant:

The Stockyard Property Group, LLC

Address of request:

0 N 6th Ave

Mailing address:

P.O. Box 1420 Wauchula, FL 33873

Daytime Telephone:

813-335-7057

Owner's Name & Address (as shown on property records):

☒ Check, if same as above.

If different: Name:

Mailing Address:

Daytime Telephone:

NOTE:

IF THE APPLICANT IS NOT THE OWNER OF THE ABOVE PROPERTY,
WRITTEN CONSENT BY THE OWNER MUST BE SUPPLIED BY THE
APPLICANT AT THE TIME OF SUBMITTAL TO THE CITY'S PLANNING
AND ZONING DEPARTMENT. ALL REQUESTS MAY ONLY BE
INITIATED BY THE CURRENT PROPERTY OWNER.

Legal

description:

See

attached

property

card

Current Zoning

P-SP

Future Land Use

P-SP

Size of Parcel:

1,650 sq ft. (.037) ac.

Current Improvements: (Buildings, etc. on property)

Drive way

Reason for request:

To Make Consistent with surrounding Property Changes

If Annexation and/or Re-Zone:

Current County Zoning Classification NA

City Zoning Classification and Future Land Use classification sought: C-2/Commercial

What property usage is to the North: Office, South: Office,

East: Office and West: Office of your property (example: residence)?

Number of residences on parcel(s) (Existing and/or proposed): 2

Population of parcel(s): 2

*******FOR SPECIAL EXCEPTION REQUESTS ONLY*******

Square footage to be used for the activity: _____

Proposed Hours: _____

Associated Noise: _____

Materials stored on premises: _____

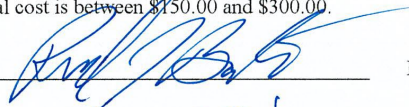
Traffic caused by activity: _____

Number of off-street parking spaces: _____

Have you filed any previous applications? No

If yes, please describe request and give date of application: _____

I have read and understand the requirements of the application and agree to pay all costs of the process.
The typical total cost is between \$150.00 and \$300.00.

Signature(s):  Date: 5-28-25

Print Name(s): Rick J. Batema

Signature of applicant(s): _____ Date: _____

Print Name(s): _____

FOR OFFICE USE ONLY

___ Application	_____	
___ Ad	_____	
___ Copies	_____	(.15 ea single sided)
		(.20 ea double sided)
___ Postage	_____	
	Total Due	_____

[illegible]

ORDINANCE NO. 2025-07

AN ORDINANCE OF THE CITY OF WAUCHULA, FLORIDA; PROVIDING FOR AN AMENDMENT TO THE FUTURE LAND USE MAP OF THE CITY OF WAUCHULA, FLORIDA, SPECIFICALLY CHANGING THE FUTURE LAND USE CLASSIFICATION FROM PUBLIC/SEMI-PUBLIC (PSP) TO COMMERCIAL ON APPROXIMATELY 2.27 ACRES LOCATED AT 1001 NORTH 6TH STREET, NORTH OF BELL STREET, (PARCEL NUMBERS 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000), AS IDENTIFIED IN EXHIBIT "A" HEREOF; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, Sections 163.3161 through 163.3215, Florida Statutes, the Local Government Comprehensive Planning and Land Development Regulation Act, empowers and mandates the City of Wauchula, Florida, (the "City") to plan for future development and growth and to adopt and amend comprehensive plans, or elements or portions thereof, to guide the future growth and development of the City; and

WHEREAS, pursuant to Section 163.3184, Florida Statutes, the City Commission held meetings and hearings on **Amendment 25-03SS**, with due public notice having been provided, to obtain public comment, and considered all written and oral comments received during public hearings, including support documents; and

WHEREAS, in exercise of its authority the City Commission has determined it necessary to adopt this **Amendment 25-03SS** to the Comprehensive Plan, which map is marked as Exhibit "A" and is attached and made a part hereof, to ensure that the Plan is in full compliance with the Laws of the State of Florida; to preserve and enhance present advantages; encourage the most appropriate use of land, water, and resources consistent with the public interest; and deal effectively with future problems that may result from the use and development of land within the City of Wauchula; and

WHEREAS, in accordance with the procedures required by Sections 166.041 (3)(c)2, Florida Statutes, and other applicable law, the regulations contained within this ordinance were considered by the City's Planning and Zoning Board, sitting as the Local Planning Agency (LPA) as designated by the City, at a duly advertised public meeting on July 21, 2025, at which time interested parties and citizens had the opportunity to be heard and such amendments were recommended to the City Commission for adoption; and

WHEREAS, pursuant to Section 163.3184, Florida Statutes, the Commission held a meeting and hearing on this amendment, with due public notice having been provided, to obtain public comment, and considered all written

and oral comments received during public hearings, including support documents.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF WAUCHULA, FLORIDA, AS FOLLOWS:

Section 1. AMENDMENT TO THE FUTURE LAND USE MAP. the Commission of the City of Wauchula, Florida, amends its Comprehensive Plan in the following specific manner:

The Future Land Use Map is amended to specifically change the Future Land Use Classification from Public/Semi-Public to Commercial on two parcels of land containing approximately +/-2.27 acres located at 1001 North 6th Avenue, north of Bell Street, (Parcel Numbers 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000) and shown on the Proposed Future Land Use Map attached as Exhibit "A".

Section 2. RECITALS. The provisions set forth in the recitals to this Ordinance (whereas clauses) are hereby adopted by the Commission as the legislative findings and intent pertaining to this Ordinance.

Section 3. SEVERABILITY. If any section, subsection, sentence, clause, or phrase of this Ordinance is, for any reason held to be unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance. The City of Wauchula, Florida, hereby declares that it would have passed this Ordinance, and each section, subsection, clause, or phrase thereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses, and phrases be declared unconstitutional.

Section 4. CONFLICTS. All ordinances in conflict herewith are hereby repealed to the extent necessary to give this Ordinance full force and effect, provided however, that nothing herein shall be interpreted so as to repeal any existing ordinance or resolution relating to means of securing compliance with the City's Code of Ordinances and Unified Land Development Code (ULDC), unless such repeal is explicitly set forth herein.

Section 5. EFFECTIVE DATE. The ordinance shall take effect as provided for in 163.3187(5)(c), Florida Statutes.

INTRODUCED AND PASSED on first reading in regular session of the City Commission of the City of Wauchula, the ____ day of ____, 2025.

PASSED on second and final reading by the City Commission of the City of Wauchula, Florida, at regular session this ____ day of ____, 2025.

This ordinance was moved for adoption by Commissioner _____.
The motion was seconded by Commissioner _____, and upon being put to a vote, the vote was as follows:

Commissioner Anne Miller _____	insert yes or no
Commissioner Russell Graylin Smith _____	insert yes or no
Commissioner Keith Nadaskay, Jr _____	insert yes or no
Commissioner Dr. Sherri Albritton _____	insert yes or no
Commissioner Gary Smith _____	insert yes or no

(SEAL)

ATTEST:

APPROVED:

Stephanie Camacho, City Clerk

Richard Keith Nadaskay, Jr., Mayor

APPROVED AS TO FORM AND LEGALITY:

Thomas A. Cloud, City Attorney

City of Wauchula Proposed Future Land Use Map



ORDINANCE NO. 2025-08

AN ORDINANCE OF THE CITY OF WAUCHULA, FLORIDA; PROVIDING FOR AN AMENDMENT TO THE ZONING MAP OF THE CITY OF WAUCHULA, FLORIDA, SPECIFICALLY CHANGING THE ZONING MAP FROM PUBLIC/SEMI-PUBLIC (PSP) TO C-2 HIGHWAY COMMERCIAL/LIGHT MANUFACTURING ON APPROXIMATELY 2.27 ACRES LOCATED AT 1001 NORTH 6TH STREET, NORTH OF BELL STREET, (PARCEL NUMBERS 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000), AS IDENTIFIED IN EXHIBIT "A" HEREOF; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Hardee County Board of County Commissioners (the "Applicant") requests a change of zoning from Public/Semi-Public (P/SP) to C-2 Highway Commercial/Light Manufacturing on two parcels of land containing approximately +/-2.27 acres located at 1001 North 6th Avenue north of Bell Street, (Parcel Numbers 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000) and

WHEREAS, the real property which is the subject of this Ordinance constitutes less than five percent (5%) of the municipally zoned area of the City; and

WHEREAS, on July 21, 2025, in accordance with Section 163.3174, Florida Statutes, and applicable law, the City's Planning and Zoning Board, sitting as the Local Planning Agency (LPA) as designated by the City, at a duly advertised public meeting considered the Applicant's request for rezoning as set forth in this Ordinance which included, but is not limited to, testimony and argument(s) from interested and/or aggrieved parties; and

WHEREAS, on July 21, 2025, the interested and/or aggrieved parties and citizens in attendance were provided with an opportunity to be heard and present testimony to the City's Planning and Zoning Board; and

WHEREAS, on July 21, 2025, after considering all the facts and testimony presented by the City, interested and/or aggrieved parties, and citizens in attendance, the City's Planning and Zoning Board voted to recommend approval of the Applicant's request for the rezoning as set forth in this Ordinance to the City Commission; and

WHEREAS, as a result of this Ordinance being initiated by the Applicant (not the municipality), the City Commission of the City of Wauchula held duly noticed public hearings regarding the parcel shown on Exhibit "A" in accordance with Section 166.041 (3), Florida Statutes, to provide the public an opportunity to be heard, obtain public comment, and receive and consider all written and oral testimony presented during such public hearings, including supporting documentation; and

WHEREAS, the City Commission of the City of Wauchula has adopted Ordinance 2025-07, a Future Land Use Map Amendment to the City's Comprehensive Plan, designating the subject parcel depicted in Exhibit "A," attached hereto and incorporated herein, with a Future Land Use designation of "Commercial;" and

WHEREAS, in exercise of its authority, the City Commission of the City of Wauchula has determined it necessary to amend the Official Zoning Map to change the City zoning classifications assigned to this property.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF WAUCHULA, FLORIDA, AS FOLLOWS:

Section 1. AMENDMENT TO THE OFFICIAL ZONING MAP. The Commission of the City of Wauchula, Florida, amends its Official Zoning Map in the following specific manner:

The Official Zoning Map is amended to specifically change the zoning from Public/Semi-Public (P/SP) to C-2 Highway Commercial/ Light Manufacturing on two parcels of land containing approximately +/-2.27 acres located at 1001 North 6th Avenue north of Bell Street, (Parcel Numbers 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000).

Section 2. RECITALS. The provisions set forth in the recitals to this Ordinance (whereas clauses) are hereby adopted by the Commission as the legislative findings and intent pertaining to this Ordinance.

Section 3. SEVERABILITY. If any section, subsection, sentence, clause, or phrase of this Ordinance is, for any reason held to be unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance. The City of Wauchula, Florida, hereby declares that it would have passed this Ordinance, and each section, subsection, clause, or phrase thereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses, and phrases be declared unconstitutional.

Section 4. CONFLICTS. All ordinances in conflict herewith are hereby repealed to the extent necessary to give this Ordinance full force and effect, provided however, that nothing herein shall be interpreted so as to repeal any existing ordinance or resolution relating to means of securing compliance with the City's Code of Ordinances and Unified Land Development Code (ULDC), unless such repeal is explicitly set forth herein.

Section 5. EFFECTIVE DATE. The ordinance shall take effect concurrent with the effective date of Ordinance 2025-07.

INTRODUCED AND PASSED on first reading in regular session of the City Commission of the City of Wauchula, the ____ day of ____, 2025.

PASSED on second and final reading by the City Commission of the City of Wauchula, Florida, at regular session this ____ day of ____, 2025.

This ordinance was moved for adoption by Commissioner _____.
The motion was seconded by Commissioner _____, and upon being put to a vote, the vote was as follows:

Commissioner Anne Miller	_____	insert yes or no
Commissioner Russell Graylin Smith	_____	insert yes or no
Commissioner Keith Nadaskay, Jr	_____	insert yes or no
Commissioner Dr. Sherri Albritton	_____	insert yes or no
Commissioner Gary Smith	_____	insert yes or no

(SEAL)

ATTEST:

APPROVED:

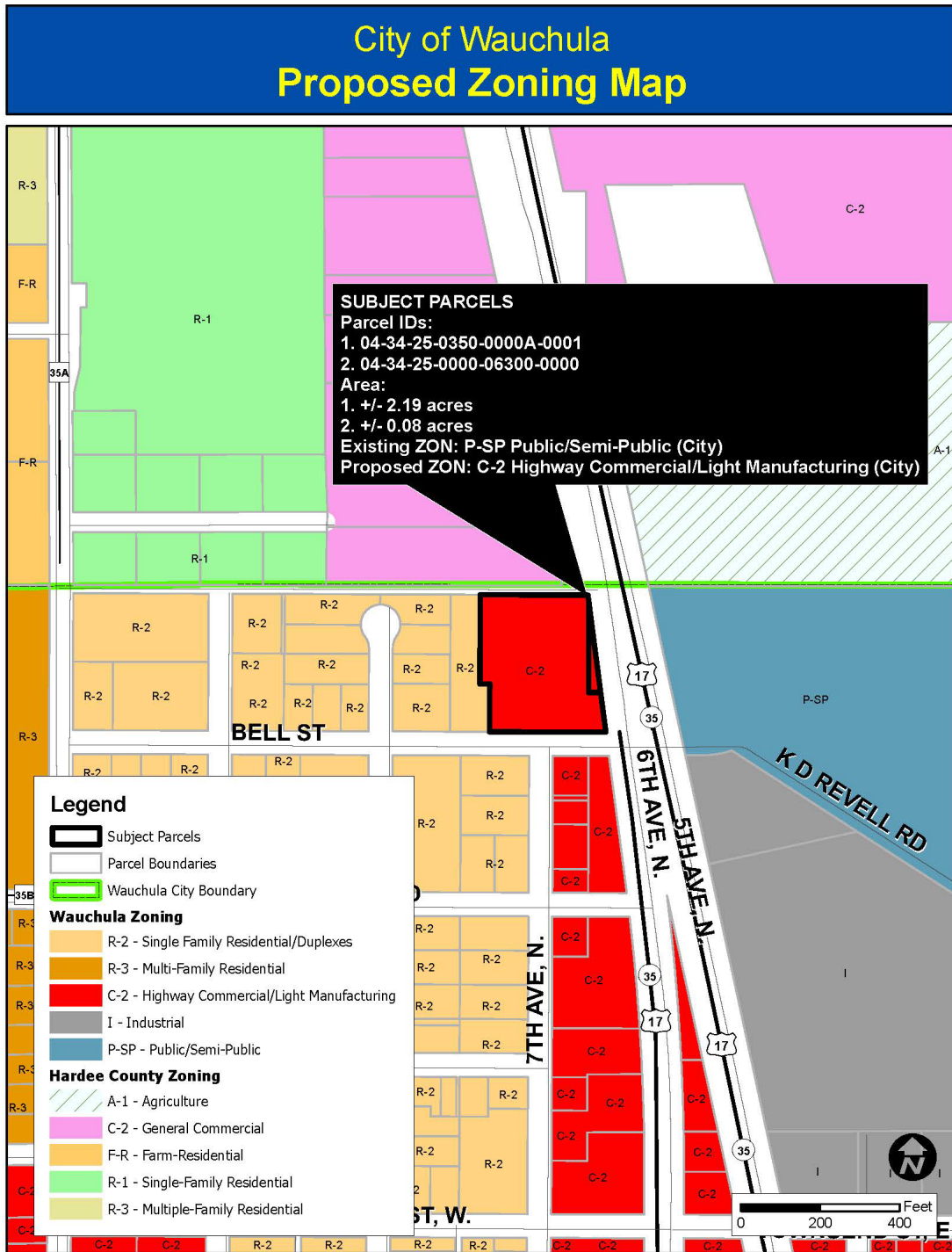
Stephanie Camacho, City Clerk

Richard Keith Nadaskay, Jr., Mayor

APPROVED AS TO FORM AND LEGALITY:

Thomas A. Cloud, City Attorney

Exhibit "A" Ordinance No. 2025-08 Zoning Map



ORDINANCE NO. 2025-08

AN ORDINANCE OF THE CITY OF WAUCHULA, FLORIDA; PROVIDING FOR AN AMENDMENT TO THE ZONING MAP OF THE CITY OF WAUCHULA, FLORIDA, SPECIFICALLY CHANGING THE ZONING MAP FROM PUBLIC/SEMI-PUBLIC (PSP) TO C-2 HIGHWAY COMMERCIAL/LIGHT MANUFACTURING ON APPROXIMATELY 2.27 ACRES LOCATED AT 1001 NORTH 6TH STREET, NORTH OF BELL STREET, (PARCEL NUMBERS 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000), AS IDENTIFIED IN EXHIBIT "A" HEREOF; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Hardee County Board of County Commissioners (the "Applicant") requests a change of zoning from Public/Semi-Public (P/SP) to C-2 Highway Commercial/Light Manufacturing on two parcels of land containing approximately +/-2.27 acres located at 1001 North 6th Avenue north of Bell Street, (Parcel Numbers 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000) and

WHEREAS, the real property which is the subject of this Ordinance constitutes less than five percent (5%) of the municipally zoned area of the City; and

WHEREAS, on July 21, 2025, in accordance with Section 163.3174, Florida Statutes, and applicable law, the City's Planning and Zoning Board, sitting as the Local Planning Agency (LPA) as designated by the City, at a duly advertised public meeting considered the Applicant's request for rezoning as set forth in this Ordinance which included, but is not limited to, testimony and argument(s) from interested and/or aggrieved parties; and

WHEREAS, on July 21, 2025, the interested and/or aggrieved parties and citizens in attendance were provided with an opportunity to be heard and present testimony to the City's Planning and Zoning Board; and

WHEREAS, on July 21, 2025, after considering all the facts and testimony presented by the City, interested and/or aggrieved parties, and citizens in attendance, the City's Planning and Zoning Board voted to recommend approval of the Applicant's request for the rezoning as set forth in this Ordinance to the City Commission; and

WHEREAS, as a result of this Ordinance being initiated by the Applicant (not the municipality), the City Commission of the City of Wauchula held duly noticed public hearings regarding the parcel shown on Exhibit "A" in accordance with Section 166.041 (3), Florida Statutes, to provide the public an opportunity to be heard, obtain public comment, and receive and consider all written and oral testimony presented during such public hearings, including supporting documentation; and

WHEREAS, the City Council of the City of Wauchula has adopted Ordinance 2025-07, a Future Land Use Map Amendment to the City's Comprehensive Plan, designating the subject parcel depicted in Exhibit "A," attached hereto and incorporated herein, with a Future Land Use designation of "Commercial;" and

WHEREAS, in exercise of its authority, the City Commission of the City of Wauchula has determined it necessary to amend the Official Zoning Map to change the City zoning classifications assigned to this property.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF WAUCHULA, FLORIDA, AS FOLLOWS:

Section 1. AMENDMENT TO THE OFFICIAL ZONING MAP. the Commission of the City of Wauchula, Florida, amends its Official Zoning Map in the following specific manner:

The Official Zoning Map is amended to specifically change the zoning from Public/Semi-Public (P/SP) to C-2 Highway Commercial/ Light Manufacturing on two parcels of land containing approximately +/-2.27 acres located at 1001 North 6th Avenue north of Bell Street, (Parcel Numbers 04-34-25-0350-0000A-0001 and 04-34-25-0000-06300-0000).

Section 2. RECITALS. The provisions set forth in the recitals to this Ordinance (whereas clauses) are hereby adopted by the Commission as the legislative findings and intent pertaining to this Ordinance.

Section 3. SEVERABILITY. If any section, subsection, sentence, clause, or phrase of this Ordinance is, for any reason held to be unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance. The City of Wauchula, Florida, hereby declares that it would have passed this Ordinance, and each section, subsection, clause, or phrase thereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses, and phrases be declared unconstitutional.

Section 4. CONFLICTS. All ordinances in conflict herewith are hereby repealed to the extent necessary to give this Ordinance full force and effect, provided however, that nothing herein shall be interpreted so as to repeal any existing ordinance or resolution relating to means of securing compliance with the City's Code of Ordinances and Unified Land Development Code (ULDC), unless such repeal is explicitly set forth herein.

Section 5. EFFECTIVE DATE. The ordinance shall take effect concurrent with the effective date of Ordinance 2025-07.

INTRODUCED AND PASSED on first reading in regular session of the City Commission of the City of Wauchula, the ____ day of ____, 2025.

PASSED on second and final reading by the City Commission of the City of Wauchula, Florida, at regular session this ____ day of ____, 2025.

This ordinance was moved for adoption by Commissioner _____.
The motion was seconded by Commissioner _____, and upon being put to a vote, the vote was as follows:

Commissioner Anne Miller _____	insert yes or no
Commissioner Russell Graylin Smith _____	insert yes or no
Commissioner Keith Nadaskay, Jr _____	insert yes or no
Commissioner Dr. Sherri Albritton _____	insert yes or no
Commissioner Gary Smith _____	insert yes or no

(SEAL)

ATTEST:

APPROVED:

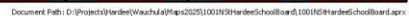
Stephanie Camacho, City Clerk

Richard Keith Nadaskay, Jr., Mayor

APPROVED AS TO FORM AND LEGALITY:

Thomas A. Cloud, City Attorney

City of Wauchula Proposed Zoning Map



ORDINANCE NO. 2025-12

AN ORDINANCE OF THE CITY OF WAUCHULA, FLORIDA; PROVIDING FOR AN AMENDMENT TO THE FUTURE LAND USE MAP OF THE CITY OF WAUCHULA, FLORIDA, SPECIFICALLY CHANGING THE FUTURE LAND USE CLASSIFICATION FROM COUNTY TOWN CENTER TO CITY LOW DENSITY RESIDENTIAL (LDR) ON ONE PARCEL OF LAND CONTAINING APPROXIMATELY +/-0.28 ACRES LOCATED AT 572 STENSTROM ROAD, (PARCEL NUMBER 09-34-25-0830-00003-0024), AS IDENTIFIED IN EXHIBIT "A" HEREOF; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, Sections 163.3161 through 163.3215, Florida Statutes, the Local Government Comprehensive Planning and Land Development Regulation Act, empowers and mandates the City of Wauchula, Florida, (the "City") to plan for future development and growth and to adopt and amend comprehensive plans, or elements or portions thereof, to guide the future growth and development of the City; and

WHEREAS, pursuant to Section 163.3184, Florida Statutes, the City Commission held meetings and hearings on **Amendment 25-03SS**, with due public notice having been provided, to obtain public comment, and considered all written and oral comments received during public hearings, including support documents; and

WHEREAS, in exercise of its authority the City Commission has determined it necessary to adopt this **Amendment 25-03SS** to the Comprehensive Plan, which map is marked as Exhibit "A" and is attached and made a part hereof, to ensure that the Plan is in full compliance with the Laws of the State of Florida; to preserve and enhance present advantages; encourage the most appropriate use of land, water, and resources consistent with the public interest; and deal effectively with future problems that may result from the use and development of land within the City of Wauchula; and

WHEREAS, in accordance with the procedures required by Sections 166.041 (3)(c)2, Florida Statutes, and other applicable law, the regulations contained within this ordinance were considered by the City's Planning and Zoning Board, sitting as the Local Planning Agency (LPA) as designated by the City, at a duly advertised public meeting on July 21, 2025, at which time interested parties and citizens had the opportunity to be heard and such amendments were recommended to the City Commission for adoption; and

WHEREAS, pursuant to Section 163.3184, Florida Statutes, the Commission held a meeting and hearing on this amendment, with due public

notice having been provided, to obtain public comment, and considered all written and oral comments received during public hearings, including support documents.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF WAUCHULA, FLORIDA, AS FOLLOWS:

Section 1. AMENDMENT TO THE FUTURE LAND USE MAP. the Commission of the City of Wauchula, Florida, amends its Comprehensive Plan in the following specific manner: The Future Land Use Map is amended to specifically change the Future Land Use Classification from County Town Center to City Low Density Residential (LDR) on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024). and shown on the Proposed Future Land Use Map attached as Exhibit "A".

Section 2. RECITALS. The provisions set forth in the recitals to this Ordinance (whereas clauses) are hereby adopted by the Commission as the legislative findings and intent pertaining to this Ordinance.

Section 3. SEVERABILITY. If any section, subsection, sentence, clause, or phrase of this Ordinance is, for any reason held to be unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance. The City of Wauchula, Florida, hereby declares that it would have passed this Ordinance, and each section, subsection, clause, or phrase thereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses, and phrases be declared unconstitutional.

Section 4. CONFLICTS. All ordinances in conflict herewith are hereby repealed to the extent necessary to give this Ordinance full force and effect, provided however, that nothing herein shall be interpreted so as to repeal any existing ordinance or resolution relating to means of securing compliance with the City's Code of Ordinances and Unified Land Development Code (ULDC), unless such repeal is explicitly set forth herein.

Section 5. EFFECTIVE DATE. The ordinance shall take effect as provided for in 163.3187(5)(c), Florida Statutes.

INTRODUCED AND PASSED on first reading in regular session of the City Commission of the City of Wauchula, the ____ day of ____, 2025.

PASSED on second and final reading by the City Commission of the City of Wauchula, Florida, at regular session this ____ day of ____, 2025.

This ordinance was moved for adoption by Commissioner _____.
The motion was seconded by Commissioner _____, and upon being put to a vote, the vote was as follows:

Commissioner Anne Miller _____	insert yes or no
Commissioner Russell Graylin Smith _____	insert yes or no
Commissioner Keith Nadaskay, Jr _____	insert yes or no
Commissioner Dr. Sherri Albritton _____	insert yes or no
Commissioner Gary Smith _____	insert yes or no

(SEAL)

ATTEST:

APPROVED:

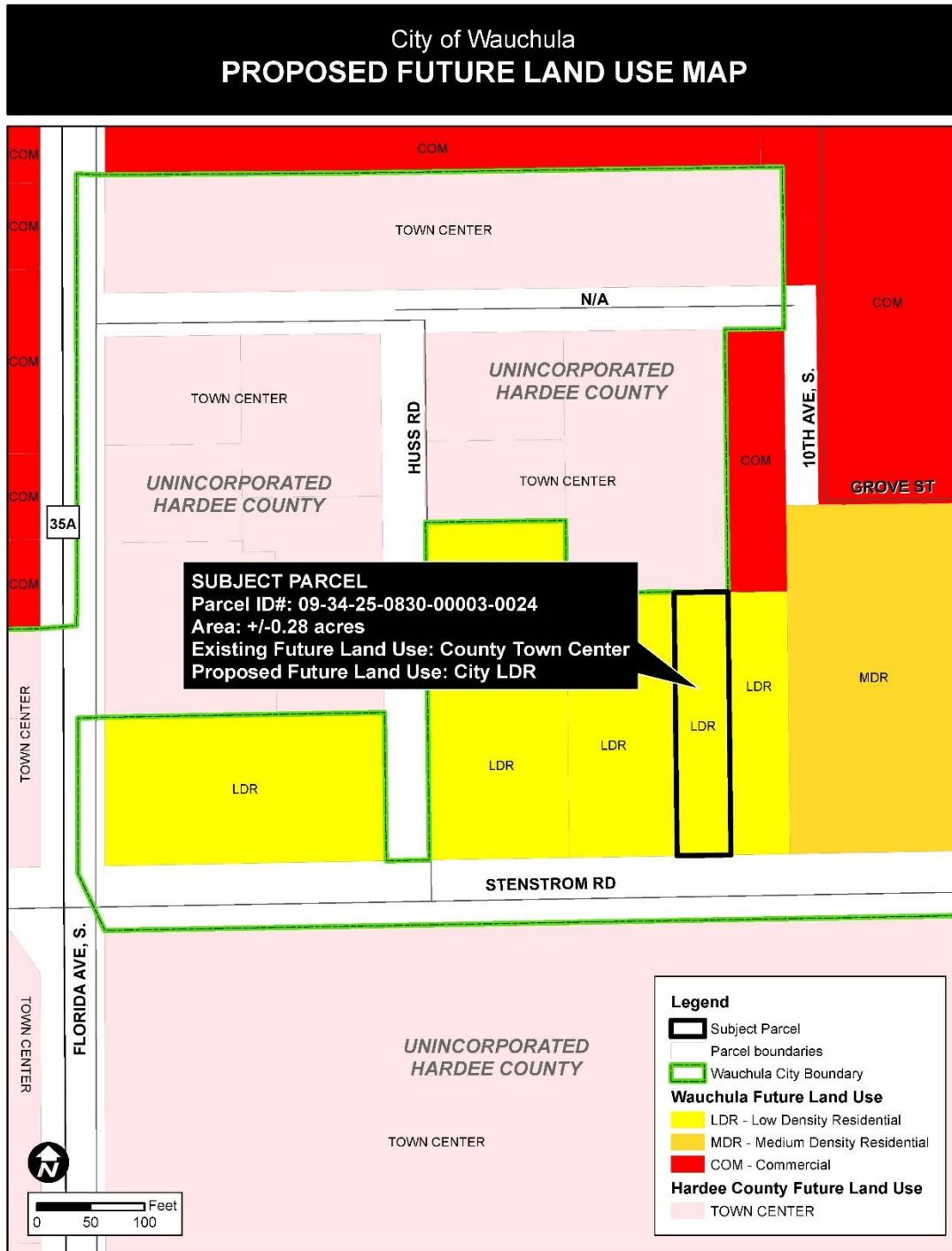
Stephanie Camacho, City Clerk

Richard Keith Nadaskay, Jr., Mayor

APPROVED AS TO FORM AND LEGALITY:

Thomas A. Cloud, City Attorney

Exhibit "A"
Ordinance No. 2025-04
Future Land Use Map





**CITY OF WAUCHULA
FUTURE LAND USE AND ZONING AMENDMENT
STAFF REPORT & PROPOSED AMENDMENTS**

TO: City of Wauchula City Commission

PREPARED BY: Central Florida Regional Planning Council

AGENDA DATE: September 8, 2025

SUBJECT:

ORDINANCE 2025-12: FUTURE LAND USE MAP AMENDMENT:

An applicant-initiated request to amend the **Future Land Use classification** from County Town Center to City Low Density Residential (LDR) on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024).

ORDINANCE 2025-13: REZONING:

An applicant-initiated request to amend the **Zoning Map** from County Farm Residential (FR) to City R-2, Single Family Residential/Duplexes on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024).

AGENDA AND HEARING DATES:

August 18, 2025, 5:30 PM	Planning and Zoning Board (Public Hearing)
September 8, 6:00 PM City	City Commission (First Reading)
October 13, 2025, 6:00 PM	City Commission (Second Reading, Public Hearing)

ATTACHMENTS:

- Aerial Photo Map
- Existing Future Land Use Map
- Proposed Future Land Use Map
- Existing Zoning Map
- Proposed Zoning Map
- Applications (Comprehensive Plan Map Amendment & Rezoning)

PLANNING AND ZONING BOARD MOTION

On September 18, 2025, the Planning and Zoning Board voted unanimously to forward the proposed Future Land Use Map Amendment and rezoning to the City Commission with recommendations of approval.

CITY COMMISSION MOTION OPTIONS (FIRST READING):

Future Land Use Map Amendment Motion Options:

1. I move the City Commission approve Ordinance 2025-12 on First Reading.
2. I move the City Commission approve Ordinance 2025-12 on First Reading with changes.
3. I move continuation to a date and time certain.

Rezoning Motion Options:

1. I move the City Commission approve Ordinance 2025-13 on First Reading.
2. I move the City Commission approve Ordinance 2025-13 on First Reading with changes.
3. I move continuation to a date and time certain.

OVERVIEW:

Applicant/ Owner	Randy Mayer
Parcel ID	09-34-25-0830-00003-0024
Total Subject Area	+/-0.28 acres
Existing Future Land Use	County Town Center
Proposed Future Land Use	City Low Density Residential
Existing Zoning	County Farm Residential (FR)
Proposed Zoning	R-2, Single-Family Residential/Duplexes

Randy Mayer (applicant and owner) is requesting the assignment of City of Wauchula Future Land Use and Zoning designations on one parcel of land totaling +/-0.28-acres. The request is to assign a Future Land Use designation of City Low Density Residential and a Zoning District of R-2, Single-Family Residential/Duplexes. The reason for this request is to assign a City Future Land Use and zoning after annexation. See aerial photo map below.

City of Wauchula AERIAL PHOTO MAP



FUTURE LAND USE REQUEST

The applicant is requesting a Future Land Use Map amendment from County Town Center to Low Density Residential. Descriptions for both the existing and proposed Future Land Use categories are provided as follows.

EXISTING FUTURE LAND USE – Hardee County Town Center Future Land Use Element, Policy L1.2

The **Town Center** category accommodates a mix of higher densities and intensities of land uses appropriate to some areas of unincorporated Hardee County. The widest range and highest densities and intensities of land uses are intended. Residential, commercial, industrial, recreational, public, and other uses are intended to be developed in close proximity to maintain or reduce distance between residences, employment areas, commercial areas and entertainment areas.

PROPOSED FUTURE LAND USE – Low Density Residential City of Wauchula Comprehensive Plan, Future Land Use Element, Policy 1.6(c)

This category permits higher density residential uses consistent with duplexes and related neighborhood or public uses, with a maximum density of eight units per acre

ZONING REQUEST

The applicant is requesting a Zoning Map amendment from County Farm Residential (FR) to City R-2, Single Family Residential/Duplexes. Descriptions for both the existing and proposed Zoning categories are provided as follows.

EXISTING ZONING

Hardee County Land Development Code, Section 3.04.04 - Farm Residential District

The primary purpose of this zoning district is to provide areas in Hardee County for very low-density residential development in combination with limited agriculture, public and community services, infra-structure, and recreation and open space land uses. In accordance with the Hardee County Comprehensive Plan, residential development may be single-family dwellings, at a permitted density of not more than one dwelling unit per acre. Development within this zoning district must be accessed by County-maintained roadways. Development within this zoning district shall be no further than two miles from existing high-density land uses and/or incorporated boundaries.

PROPOSED ZONING

City of Wauchula Land Development Code, Section 2.02.02.05 (B) - R-2, Single-Family Residential/Duplexes

The purpose of this district is to provide the opportunity for conventional single-family development and duplexes in appropriate areas of the City, compatible with existing development and in conformance with the provisions of the Comprehensive Plan.

PROPERTY INFORMATION

The request includes one parcel totaling approximately +/-0.28 acres. The property has a Future Land Use designation of County Town Center. The applicant is requesting the City assign a Future Land Use designation of City Low Density Residential (LDR) and a zoning of R-2, Single-Family Residential/Duplexes on the parcel because it was recently annexed and must have City Future Land Use and zoning designations assigned to it.

ANALYSIS:

SURROUNDING PROPERTIES:

As illustrated in the table below, the property is surrounded by Hardee County Town Center, City Commercial, and City Low Density Residential. The property to the north and south are in unincorporated Hardee County and the land to the west, and east are in the City of Wauchula. See attached maps.

<u>Northwest:</u> FLU: County TCN Zoning: County F-R Use: Vacant	<u>North:</u> FLU: County TCN Zoning: County F-R Use: Vacant	<u>Northeast:</u> FLU: City Commercial Zoning: City C-1 Use: Vacant
<u>West:</u> FLU Low Density Residential Zoning: R-2 Use: Vacant	<u>Subject Properties:</u> Current FLU: County TCN Requested FLU: Low Density Residential Current Zoning: County F-R Requested Zoning: R-2 Use: Residential	<u>East:</u> FLU: LDR Zoning: R-2 Use: Vacant
<u>Southwest:</u> FLU: County TCN Zoning: County F-R Use: Vacant	<u>South:</u> FLU: County TCN Zoning: County F-R Use: Vacant	<u>Southeast:</u> FLU: County TCN Zoning: County F-R Use: Vacant

LAND USE IMPACTS ANALYSIS:

The proposed Future Land Use is compatible with the Comprehensive Plan conditions and is compatible with the surrounding area based on the Future Land Uses assigned to nearby properties in the City limits along Stenstrom Road.

The table below shows the density for the amendment to the Zoning Map request for the property.

	Existing Zoning: County Farm Residential	Proposed Zoning: R-2, Single-Family Residential/Duplexes
Density	2 DU/Acre	8 DU/Acre

The proposed Future Land Use is compatible with the surrounding area based on the Future Land Uses assigned to nearby properties in the City limits. The proposed zoning is compatible with the companion Future Land Use request. More information is available in the Land Use Analysis located below.

PUBLIC FACILITIES AND SERVICES ANALYSIS:

Potable Water and Wastewater

The City has capacity in both systems to serve development of this property. The applicant will be responsible for connections to the City's systems.

Traffic/Transportation

The site is bordered by Stenstrom Road on the south. Access to the site will be via an existing driveway onto Stenstrom Road.

Environmental Impacts

According to the FEMA FIRM maps no portion of the site is located in a FEMA Flood Zone.

School Impacts

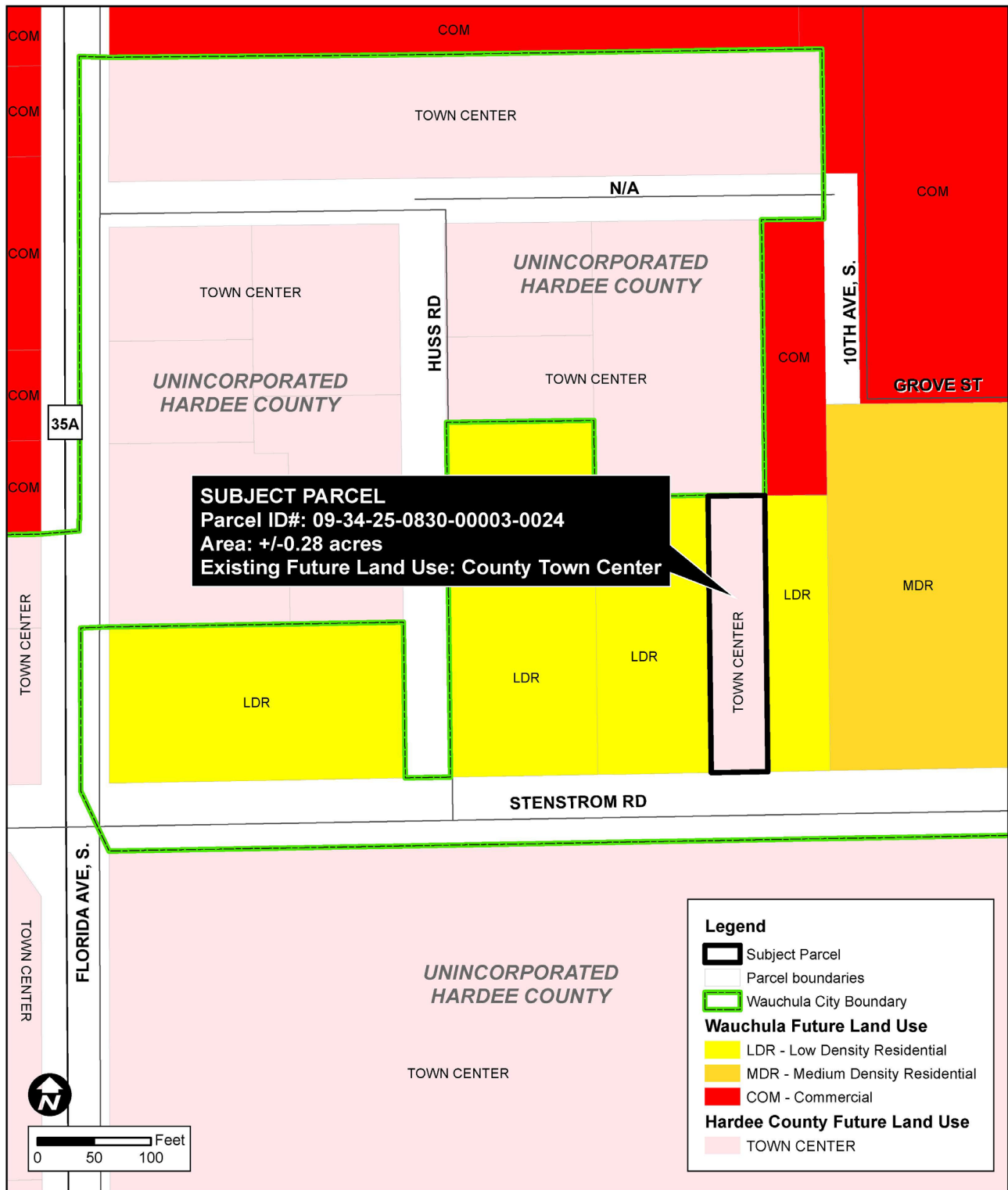
The requested Future Land Use and Zoning does permit the development of residential developments, but due to the size of the parcel, no more than 1 unit. One unit will have a de minimis effect on the surrounding schools.

CONSISTENCY WITH THE COMPREHENSIVE PLAN:

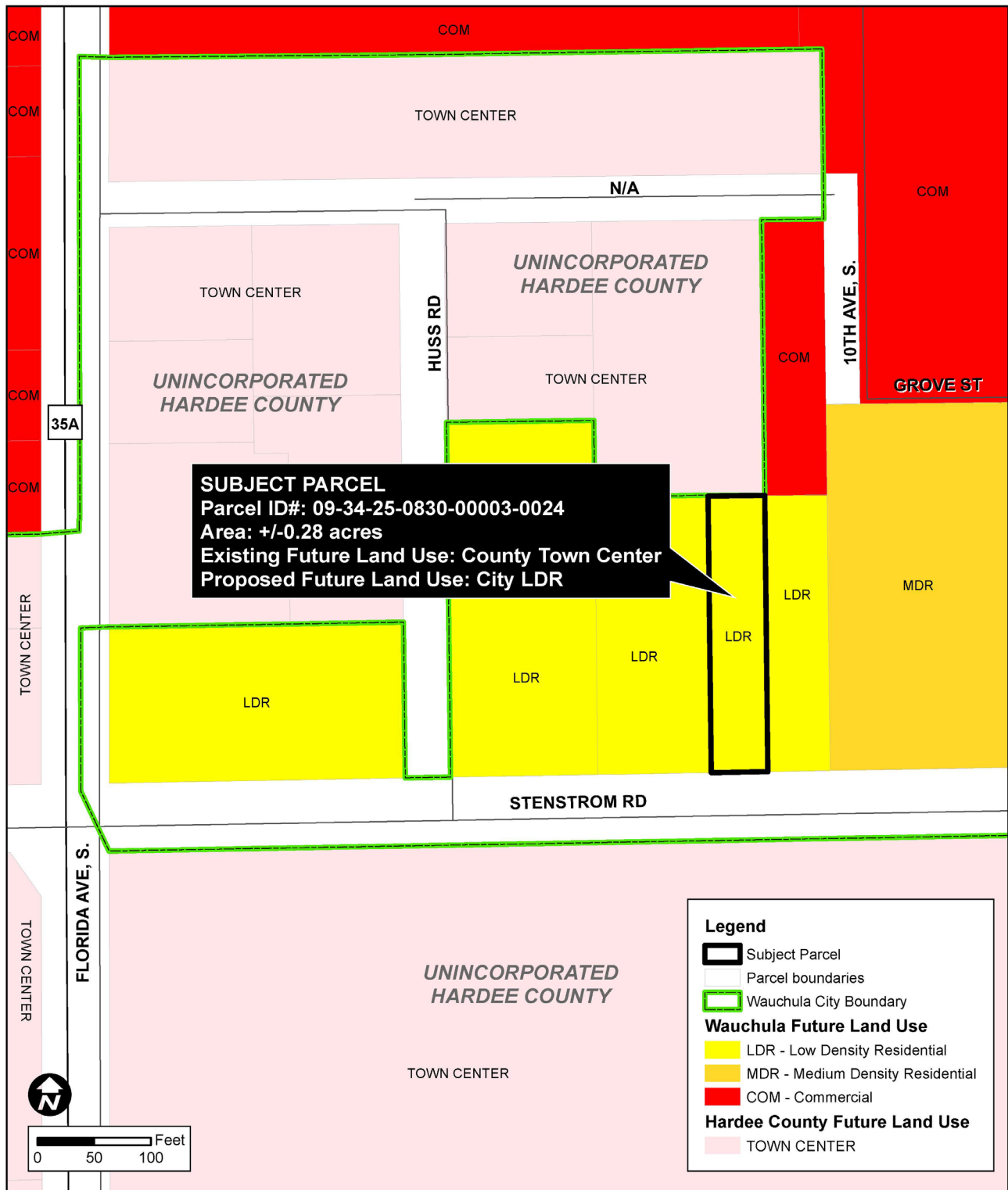
The Future Land Use Map amendment is **consistent** with the City of Wauchula Comprehensive Plan. The change in Future Land Use for the property will permit the property owner to utilize the parcels for commercial or, potentially, residential purposes.

The Zoning amendment is **consistent** with the proposed Future Land Use Map amendment.

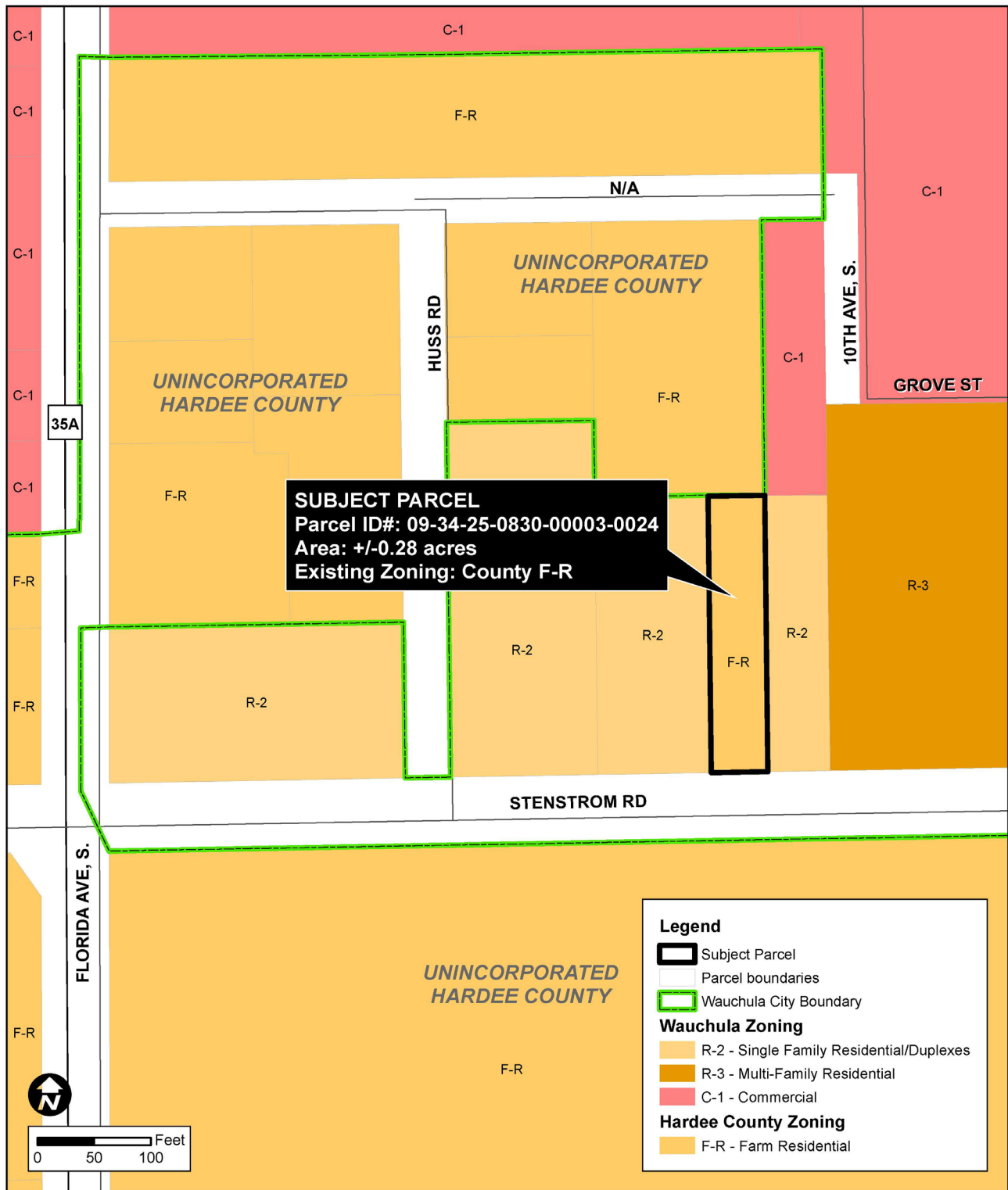
City of Wauchula EXISTING FUTURE LAND USE MAP



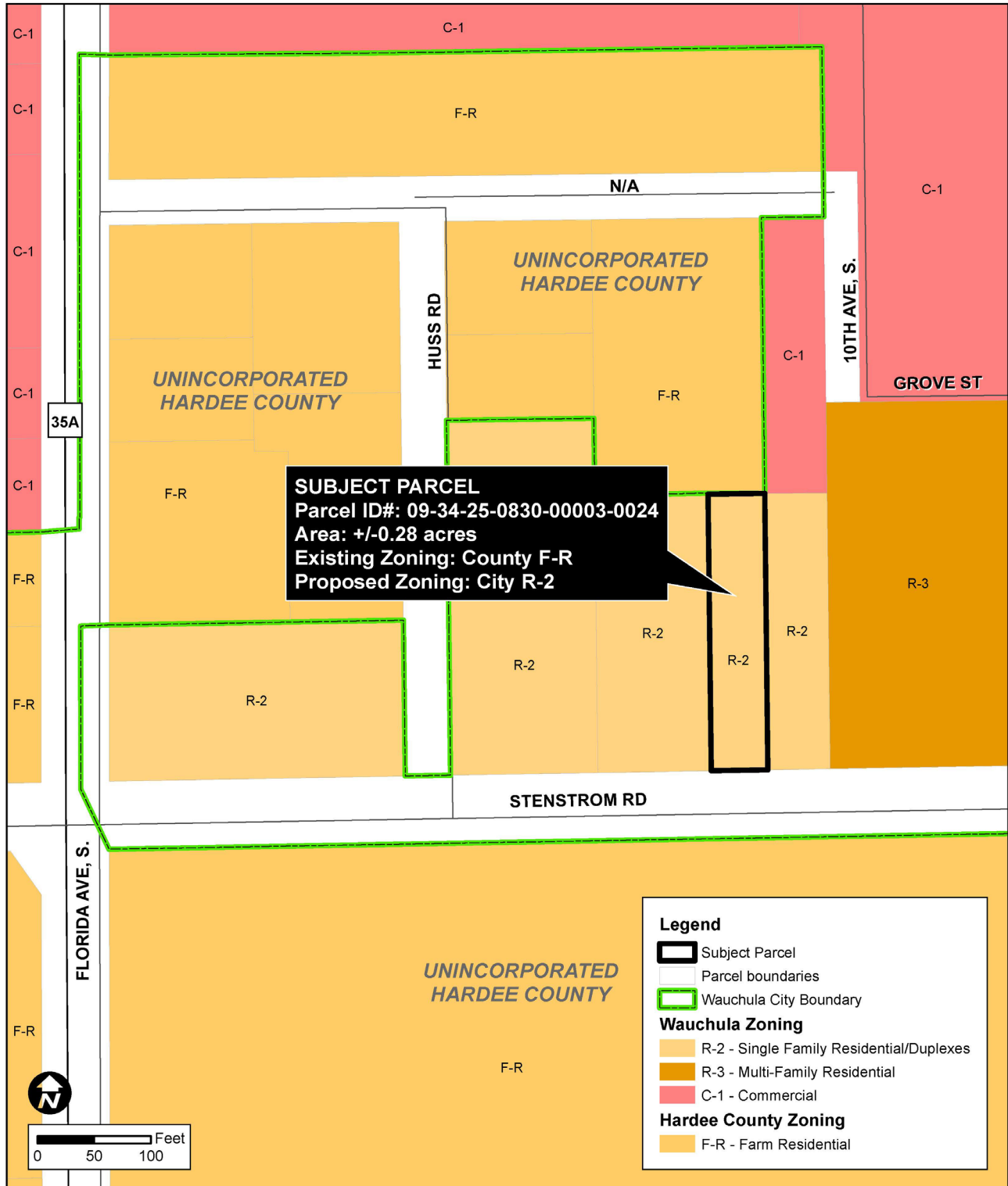
City of Wauchula PROPOSED FUTURE LAND USE MAP



City of Wauchula EXISTING ZONING MAP



City of Wauchula PROPOSED ZONING MAP



Application

FILL OUT COMPLETELY

Date Submitted

6/11/25

CITY OF WAUCHULA

☐ SPECIAL EXCEPTION ☐ VARIANCE ☒ ANNEXATION
☐ RE-ZONE ☒ FUTURE LAND USE AMENDMENT
☐ SUBDIVISION PLAT ☐ ALLEY CLOSURE

A SITE PLAN, TO SCALE, IS NEEDED FOR ALL REQUESTS.
 A METES AND BOUNDS SURVEY IS NEEDED FOR AN ANNEXATION.
 IF YOU LIVE IN A DEED RESTRICTED COMMUNITY, YOU MUST
 PROVIDE A COPY OF THE DEED RESTRICTIONS.

Applicant:

Randy Mayer

Address of request:

572 Stenstrom rd

Mailing address:

572 Stenstrom rd

Daytime Telephone:

941-932-5861

Owner's Name & Address (as shown on property records):

☒ Check, if same as above.

If different: Name:

Mailing Address:

Daytime Telephone:

NOTE :

IF THE APPLICANT IS NOT THE OWNER OF THE ABOVE PROPERTY,
 WRITTEN CONSENT BY THE OWNER MUST BE SUPPLIED BY THE
 APPLICANT AT THE TIME OF SUBMITTAL TO THE CITY'S PLANNING
 AND ZONING DEPARTMENT. ALL REQUESTS MAY ONLY BE
INITIATED BY THE CURRENT PROPERTY OWNER.

Legal description: See attached property card

Current Zoning

F-R

Future Land Use

Town Center

Size of Parcel:

.28 AC

Current Improvements: (Buildings, etc. on property)

Put up Pole Barn

Reason for request:

Put up 24X36 Pole Barn

If Annexation and/or Re-Zone:

Current County Zoning Classification F-R

City Zoning Classification and Future Land Use classification sought: R-2, Low Density Res

What property usage is to the North: vacant, South: pasture,
East: Multi-Fam and West: vacant of your property (example: residence)?

Number of residences on parcel(s) (Existing and/or proposed): 1

Population of parcel(s): 1

*******FOR SPECIAL EXCEPTION REQUESTS ONLY*******

Square footage to be used for the activity: _____

Proposed Hours: _____

Associated Noise: _____

Materials stored on premises: _____

Traffic caused by activity: _____

Number of off-street parking spaces: _____

Have you filed any previous applications? —

If yes, please describe request and give date of application: _____

I have read and understand the requirements of the application and agree to pay all costs of the process.

The typical total cost is between \$150.00 and \$300.00.

Signature(s): Randy Mayer

Date: 6/11/25

Print Name(s): Randy Mayer

Signature of applicant(s): Randy Mayer

Date: 6/11/25

Print Name(s): Randy Mayer

FOR OFFICE USE ONLY

___ Application	_____	
___ Ad	_____	
___ Copies	_____	(.15 ea single sided)
		(.20 ea double sided)
___ Postage	_____	
		Total Due _____

ORDINANCE NO. 2025-12

AN ORDINANCE OF THE CITY OF WAUCHULA, FLORIDA; PROVIDING FOR AN AMENDMENT TO THE FUTURE LAND USE MAP OF THE CITY OF WAUCHULA, FLORIDA, SPECIFICALLY CHANGING THE FUTURE LAND USE CLASSIFICATION FROM COUNTY TOWN CENTER TO CITY LOW DENSITY RESIDENTIAL (LDR) ON ONE PARCEL OF LAND CONTAINING APPROXIMATELY +/-0.28 ACRES LOCATED AT 572 STENSTROM ROAD, (PARCEL NUMBER 09-34-25-0830-00003-0024), AS IDENTIFIED IN EXHIBIT "A" HEREOF; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, Randy Mayer (the "Applicant") requests a change of Future Land Use from County Town Center to City Low Density Residential (LDR) on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024) and

WHEREAS, Sections 163.3161 through 163.3215, Florida Statutes, the Local Government Comprehensive Planning and Land Development Regulation Act, empowers and mandates the City of Wauchula, Florida, (the "City") to plan for future development and growth and to adopt and amend comprehensive plans, or elements or portions thereof, to guide the future growth and development of the City; and

WHEREAS, pursuant to Section 163.3184, Florida Statutes, the City Commission held meetings and hearings on **Amendment 25-02SS**, with due public notice having been provided, to obtain public comment, and considered all written and oral comments received during public hearings, including support documents; and

WHEREAS, in exercise of its authority the City Commission has determined it necessary to adopt this **Amendment 25-02SS** to the Comprehensive Plan, which map is marked as Exhibit "A" and is attached and made a part hereof, to ensure that the Plan is in full compliance with the Laws of the State of Florida; to preserve and enhance present advantages; encourage the most appropriate use of land, water, and resources consistent with the public interest; and deal effectively with future problems that may result from the use and development of land within the City of Wauchula; and

WHEREAS, in accordance with the procedures required by Sections 166.041 (3)(c)2, Florida Statutes, and other applicable law, the regulations contained within this ordinance were considered by the City's Planning and Zoning Board, sitting as the Local Planning Agency (LPA) as designated by the City, at a duly advertised public meeting on July 21, 2025, at which time interested parties and citizens had the opportunity to be

heard and such amendments were recommended to the City Commission for adoption; and

WHEREAS, pursuant to Section 163.3184, Florida Statutes, the Commission held a meeting and hearing on this amendment, with due public notice having been provided, to obtain public comment, and considered all written and oral comments received during public hearings, including support documents.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF WAUCHULA, FLORIDA, AS FOLLOWS:

Section 1. AMENDMENT TO THE FUTURE LAND USE MAP. the Commission of the City of Wauchula, Florida, amends its Comprehensive Plan in the following specific manner: The Future Land Use Map is amended to specifically change the Future Land Use Classification from County Town Center to City Low Density Residential (LDR) on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024). and shown on the Proposed Future Land Use Map attached as Exhibit "A".

Section 2. RECITALS. The provisions set forth in the recitals to this Ordinance (whereas clauses) are hereby adopted by the Commission as the legislative findings and intent pertaining to this Ordinance.

Section 3. SEVERABILITY. If any section, subsection, sentence, clause, or phrase of this Ordinance is, for any reason held to be unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance. The City of Wauchula, Florida, hereby declares that it would have passed this Ordinance, and each section, subsection, clause, or phrase thereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses, and phrases be declared unconstitutional.

Section 4. CONFLICTS. All ordinances in conflict herewith are hereby repealed to the extent necessary to give this Ordinance full force and effect, provided however, that nothing herein shall be interpreted so as to repeal any existing ordinance or resolution relating to means of securing compliance with the City's Code of Ordinances and Unified Land Development Code (ULDC), unless such repeal is explicitly set forth herein.

Section 5. EFFECTIVE DATE. The ordinance shall take effect as provided for in 163.3187(5)(c), Florida Statutes.

INTRODUCED AND PASSED on first reading in regular session of the City Commission of the City of Wauchula, the ____ day of ____, 2025.

PASSED on second and final reading by the City Commission of the City of Wauchula, Florida, at regular session this ____ day of ____, 2025.

This ordinance was moved for adoption by Commissioner _____.
The motion was seconded by Commissioner _____, and upon being put to a vote, the vote was as follows:

Commissioner Anne Miller _____	insert yes or no
Commissioner Russell Graylin Smith _____	insert yes or no
Commissioner Keith Nadaskay, Jr _____	insert yes or no
Commissioner Dr. Sherri Albritton _____	insert yes or no
Commissioner Gary Smith _____	insert yes or no

(SEAL)

ATTEST:

APPROVED:

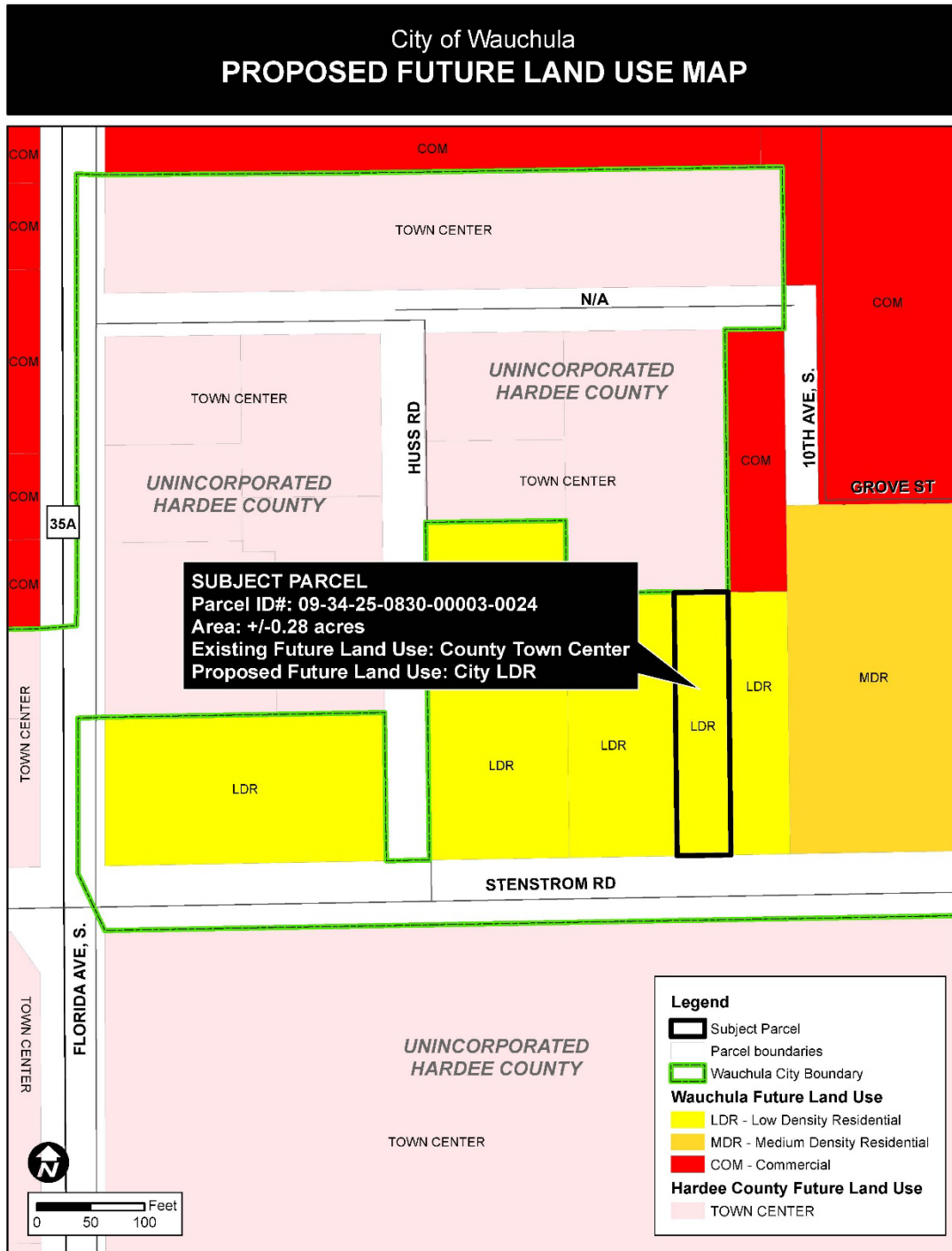
Stephanie Camacho, City Clerk

Richard Keith Nadaskay, Jr., Mayor

APPROVED AS TO FORM AND LEGALITY:

Thomas A. Cloud, City Attorney

Exhibit "A"
Ordinance No. 2025-04
Future Land Use Map



ORDINANCE NO. 2025-13

AN ORDINANCE OF THE CITY OF WAUCHULA, FLORIDA; PROVIDING FOR AN AMENDMENT TO THE ZONING MAP OF THE CITY OF WAUCHULA, FLORIDA, FROM COUNTY FARM RESIDENTIAL (FR) TO CITY R-2, SINGLE FAMILY RESIDENTIAL/DUPLEXES ON ONE PARCEL OF LAND CONTAINING APPROXIMATELY +/-0.28 ACRES LOCATED AT 572 STENSTROM ROAD, (PARCEL NUMBER 09-34-25-0830-00003-0024), AS IDENTIFIED IN EXHIBIT "A" HEREOF; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, Randy Mayer (the "Applicant") requests a change of zoning from County Farm Residential (FR) to City R-2, Single Family Residential/Duplexes on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024) and

WHEREAS, the real property which is the subject of this Ordinance constitutes less than five percent (5%) of the municipally zoned area of the City; and

WHEREAS, on July 21, 2025, in accordance with Section 163.3174, Florida Statutes, and applicable law, the City's Planning and Zoning Board, sitting as the Local Planning Agency (LPA) as designated by the City, at a duly advertised public meeting considered the Applicant's request for rezoning as set forth in this Ordinance which included, but is not limited to, testimony and argument(s) from interested and/or aggrieved parties; and

WHEREAS, on July 21, 2025, the interested and/or aggrieved parties and citizens in attendance were provided with an opportunity to be heard and present testimony to the City's Planning and Zoning Board; and

WHEREAS, on July 21, 2025, after considering all the facts and testimony presented by the City, interested and/or aggrieved parties, and citizens in attendance, the City's Planning and Zoning Board voted to recommend approval of the Applicant's request for the rezoning as set forth in this Ordinance to the City Commission; and

WHEREAS, as a result of this Ordinance being initiated by the Applicant (not the municipality), the City Commission of the City of Wauchula held duly noticed public hearings regarding the parcel shown on Exhibit "A" in accordance with Section 166.041 (3), Florida Statutes, to provide the public an opportunity to be heard, obtain public comment, and receive and consider all written and oral testimony presented during such public hearings, including supporting documentation; and

WHEREAS, the City Commission of the City of Wauchula has adopted Ordinance 2025-12, a Future Land Use Map Amendment to the City's Comprehensive Plan,

designating the subject parcel depicted in Exhibit “A,” attached hereto and incorporated herein, with a Future Land Use designation of “Low Density Residential;” and

WHEREAS, in exercise of its authority, the City Commission of the City of Wauchula has determined it necessary to amend the Official Zoning Map to change the City zoning classifications assigned to this property.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF WAUCHULA, FLORIDA, AS FOLLOWS:

Section 1. AMENDMENT TO THE OFFICIAL ZONING MAP. the Commission of the City of Wauchula, Florida, amends its Official Zoning Map in the following specific manner:

The Official Zoning Map is amended to specifically change the zoning from County Farm Residential (FR) to City R-2, Single Family Residential/Duplexes on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024).

Section 2. RECITALS. The provisions set forth in the recitals to this Ordinance (whereas clauses) are hereby adopted by the Commission as the legislative findings and intent pertaining to this Ordinance.

Section 3. SEVERABILITY. If any section, subsection, sentence, clause, or phrase of this Ordinance is, for any reason held to be unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance. The City of Wauchula, Florida, hereby declares that it would have passed this Ordinance, and each section, subsection, clause, or phrase thereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses, and phrases be declared unconstitutional.

Section 4. CONFLICTS. All ordinances in conflict herewith are hereby repealed to the extent necessary to give this Ordinance full force and effect, provided however, that nothing herein shall be interpreted so as to repeal any existing ordinance or resolution relating to means of securing compliance with the City’s Code of Ordinances and Unified Land Development Code (ULDC), unless such repeal is explicitly set forth herein.

Section 5. EFFECTIVE DATE. The ordinance shall take effect concurrent with the effective date of Ordinance 2025-12.

INTRODUCED AND PASSED on first reading in regular session of the City Commission of the City of Wauchula, the ____ day of ____, 2025.

PASSED on second and final reading by the City Commission of the City of Wauchula, Florida, at regular session this ____ day of ____, 2025.

This ordinance was moved for adoption by Commissioner _____.
The motion was seconded by Commissioner _____, and upon being put to a vote, the vote was as follows:

Commissioner Anne Miller	_____	insert yes or no
Commissioner Russell Graylin Smith	_____	insert yes or no
Commissioner Keith Nadaskay, Jr	_____	insert yes or no
Commissioner Dr. Sherri Albritton	_____	insert yes or no
Commissioner Gary Smith	_____	insert yes or no

(SEAL)

ATTEST:

APPROVED:

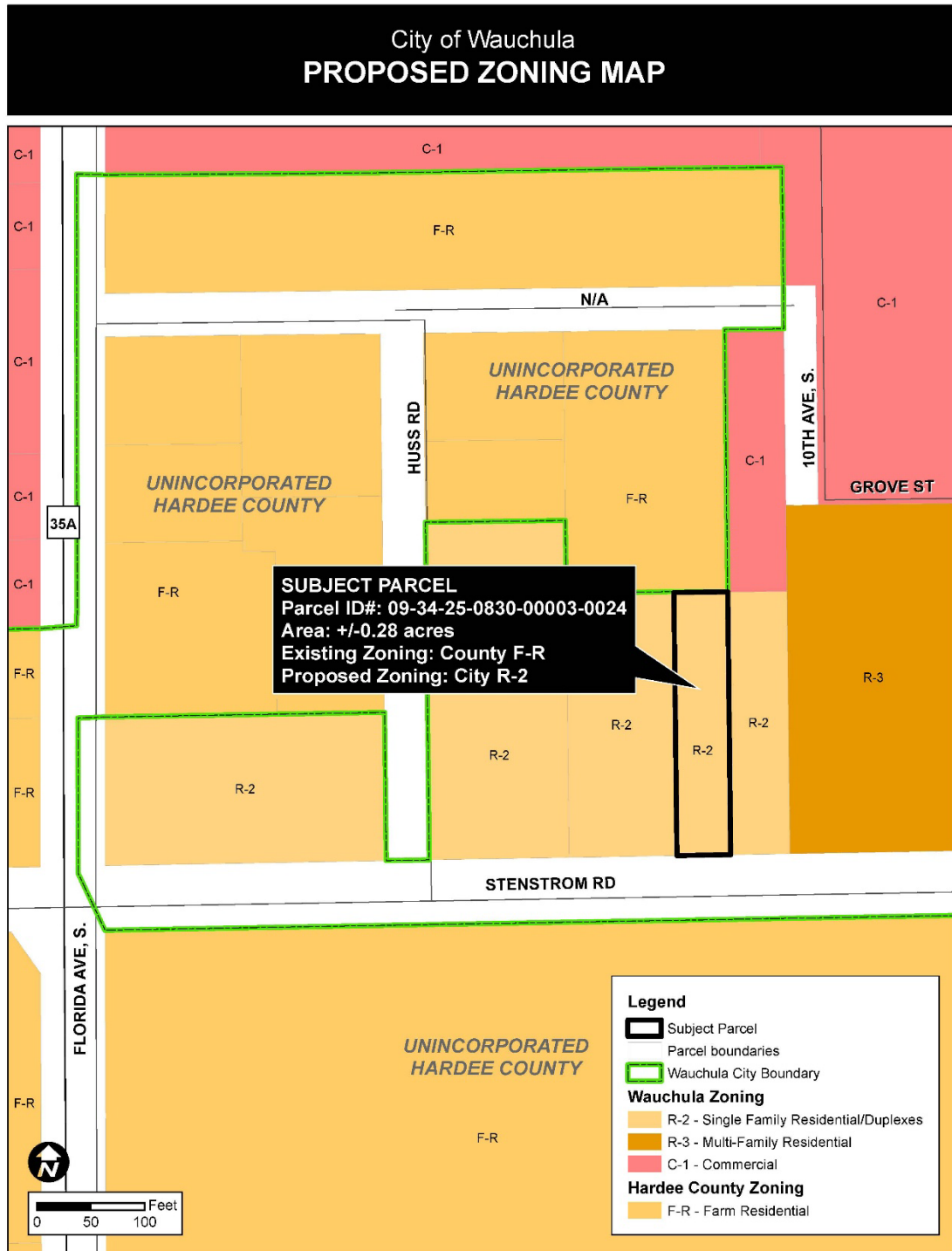
Stephanie Camacho, City Clerk

Richard Keith Nadaskay, Jr., Mayor

APPROVED AS TO FORM AND LEGALITY:

Thomas A. Cloud, City Attorney

Exhibit "A"
Ordinance No. 2025-05
Zoning Map



ORDINANCE NO. 2025-13

AN ORDINANCE OF THE CITY OF WAUCHULA, FLORIDA; PROVIDING FOR AN AMENDMENT TO THE ZONING MAP OF THE CITY OF WAUCHULA, FLORIDA, FROM COUNTY FARM RESIDENTIAL (FR) TO CITY R-2, SINGLE FAMILY RESIDENTIAL/DUPLEXES ON ONE PARCEL OF LAND CONTAINING APPROXIMATELY +/-0.28 ACRES LOCATED AT 572 STENSTROM ROAD, (PARCEL NUMBER 09-34-25-0830-00003-0024), AS IDENTIFIED IN EXHIBIT "A" HEREOF; PROVIDING FOR SEVERABILITY; PROVIDING FOR CONFLICTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Hardee County Board of County Commissioners (the "Applicant") requests a change of zoning from County Farm Residential (FR) to City R-2, Single Family Residential/Duplexes on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024) and

WHEREAS, the real property which is the subject of this Ordinance constitutes less than five percent (5%) of the municipally zoned area of the City; and

WHEREAS, on July 21, 2025, in accordance with Section 163.3174, Florida Statutes, and applicable law, the City's Planning and Zoning Board, sitting as the Local Planning Agency (LPA) as designated by the City, at a duly advertised public meeting considered the Applicant's request for rezoning as set forth in this Ordinance which included, but is not limited to, testimony and argument(s) from interested and/or aggrieved parties; and

WHEREAS, on July 21, 2025, the interested and/or aggrieved parties and citizens in attendance were provided with an opportunity to be heard and present testimony to the City's Planning and Zoning Board; and

WHEREAS, on July 21, 2025, after considering all the facts and testimony presented by the City, interested and/or aggrieved parties, and citizens in attendance, the City's Planning and Zoning Board voted to recommend approval of the Applicant's request for the rezoning as set forth in this Ordinance to the City Commission; and

WHEREAS, as a result of this Ordinance being initiated by the Applicant (not the municipality), the City Commission of the City of Wauchula held duly noticed public hearings regarding the parcel shown on Exhibit "A" in accordance with Section 166.041 (3), Florida Statutes, to provide the public an opportunity to be heard, obtain public comment, and receive and consider all written and oral testimony presented during such public hearings, including supporting documentation; and

WHEREAS, the City Council of the City of Wauchula has adopted Ordinance 2025-12, a Future Land Use Map Amendment to the City's Comprehensive Plan, designating the subject parcel depicted in Exhibit "A," attached hereto and incorporated herein, with a Future Land Use designation of "Low Density Residential;" and

WHEREAS, in exercise of its authority, the City Commission of the City of Wauchula has determined it necessary to amend the Official Zoning Map to change the City zoning classifications assigned to this property.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF WAUCHULA, FLORIDA, AS FOLLOWS:

Section 1. AMENDMENT TO THE OFFICIAL ZONING MAP. the Commission of the City of Wauchula, Florida, amends its Official Zoning Map in the following specific manner:

The Official Zoning Map is amended to specifically change the zoning from County Farm Residential (FR) to City R-2, Single Family Residential/Duplexes on one parcel of land containing approximately +/-0.28 acres located at 572 Stenstrom Road, (Parcel Number 09-34-25-0830-00003-0024).

Section 2. RECITALS. The provisions set forth in the recitals to this Ordinance (whereas clauses) are hereby adopted by the Commission as the legislative findings and intent pertaining to this Ordinance.

Section 3. SEVERABILITY. If any section, subsection, sentence, clause, or phrase of this Ordinance is, for any reason held to be unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance. The City of Wauchula, Florida, hereby declares that it would have passed this Ordinance, and each section, subsection, clause, or phrase thereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses, and phrases be declared unconstitutional.

Section 4. CONFLICTS. All ordinances in conflict herewith are hereby repealed to the extent necessary to give this Ordinance full force and effect, provided however, that nothing herein shall be interpreted so as to repeal any existing ordinance or resolution relating to means of securing compliance with the City's Code of Ordinances and Unified Land Development Code (ULDC), unless such repeal is explicitly set forth herein.

Section 5. EFFECTIVE DATE. The ordinance shall take effect concurrent with the effective date of Ordinance 2025-12.

INTRODUCED AND PASSED on first reading in regular session of the City Commission of the City of Wauchula, the ____ day of ____, 2025.

PASSED on second and final reading by the City Commission of the City of Wauchula, Florida, at regular session this ____ day of ____, 2025.

This ordinance was moved for adoption by Commissioner _____.
The motion was seconded by Commissioner _____, and upon being put to a vote, the vote was as follows:

Commissioner Anne Miller _____	insert yes or no
Commissioner Russell Graylin Smith _____	insert yes or no
Commissioner Keith Nadaskay, Jr _____	insert yes or no
Commissioner Dr. Sherri Albritton _____	insert yes or no
Commissioner Gary Smith _____	insert yes or no

(SEAL)

ATTEST:

APPROVED:

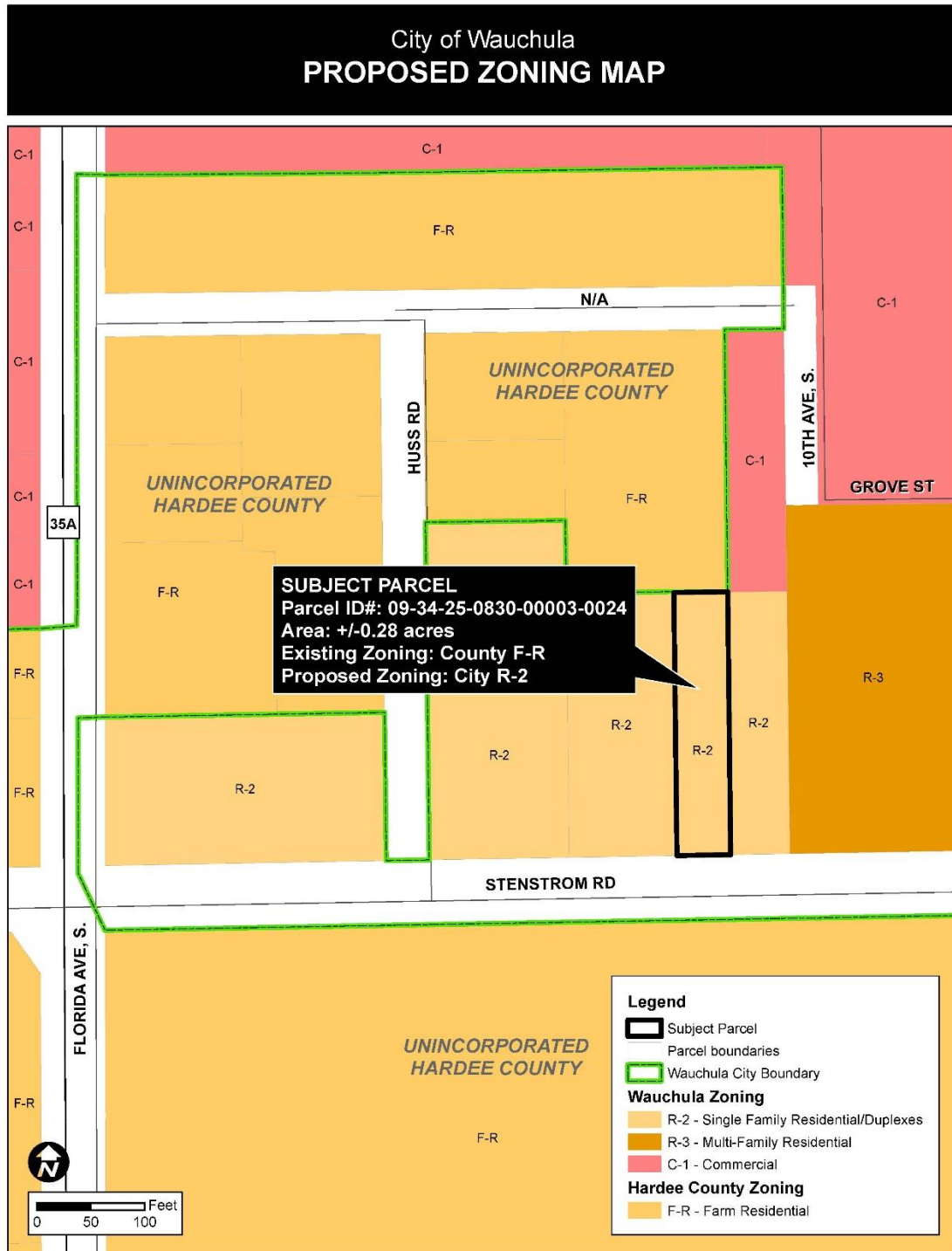
Stephanie Camacho, City Clerk

Richard Keith Nadaskay, Jr., Mayor

APPROVED AS TO FORM AND LEGALITY:

Thomas A. Cloud, City Attorney

Exhibit "A"
Ordinance No. 2025-05
Zoning Map



126 S. 7th Ave
Wauchula, FL 33873



(863) 773-3131
(863) 773-0773 Fax

Item # 6.

September 8, 2025

GENERAL EMPLOYEE PENSION AND
OTHER POST-EMPLOYMENT BENEFITS (OPEB) FUND
MEETING DURING REGULAR COMMISSION MEETING BEGINNING AT 6:00 PM
225 E MAIN STREET, WAUCHULA, FL

4TH QUARTER MEETING FOR FY 2024 - 2025

REVIEW OF FUND ACTIVITY

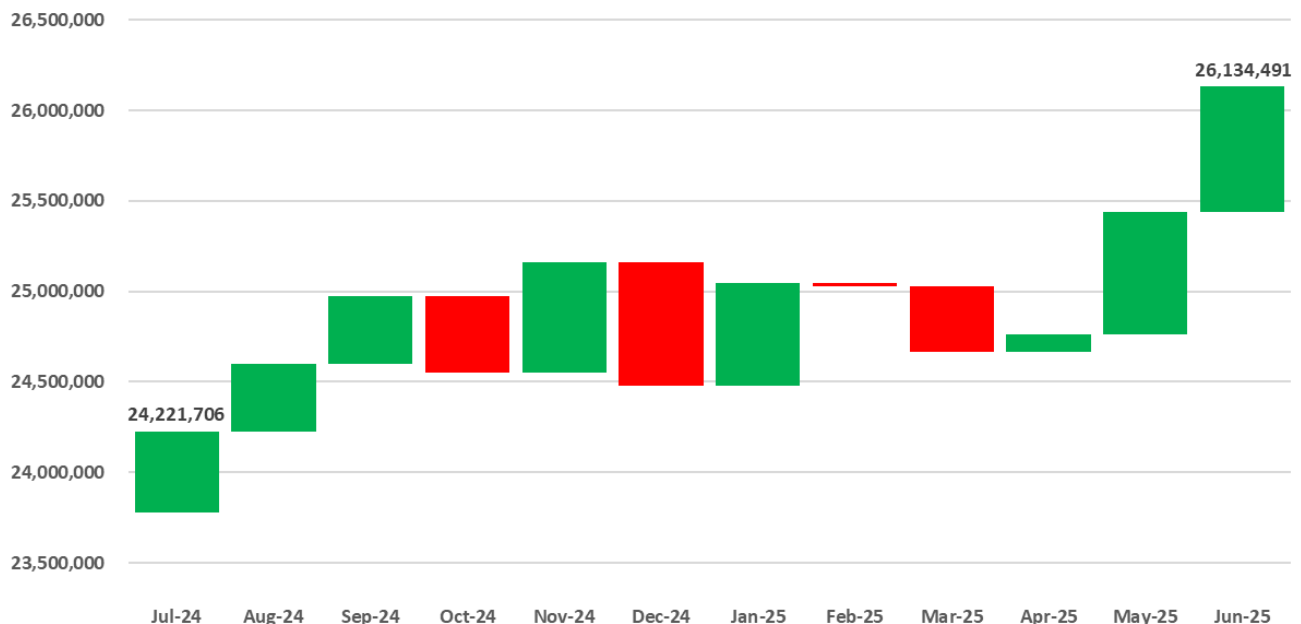
General Employee Pension Fund Reporting through Quarter 3 2024–2025

	CONTRIBUTIONS	EARNINGS/LOSSES	DISTRIBUTIONS	FEES PAID	TOTAL	BALANCE
1st Quarter	286,616	(524,079)	(249,796)	(10,881)	(498,140)	24,477,303
2nd Quarter	197,405	244,274	(245,943)	(9,157)	186,579	24,663,882
3rd Quarter	199,630	1,603,340	(308,250)	(24,110)	1,470,609	26,134,491
4th Quarter						
Total	683,650	1,323,535	(803,990)	(44,148)	1,159,047	

RATE OF RETURN

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	YTD
Cash	2.03%	2.66%	2.05%		7.15%
Broad Market HQ Bond Fund	-3.10%	3.03%	1.36%		1.20%
Large Cap Equity	0.59%	-2.29%	8.22%		6.37%
Diversified Small to Mid Cap Portfolio	-2.96%	-4.51%	3.42%		-4.17%
International Equity Portfolio	-5.01%	5.95%	15.46%		16.20%
Core Plus Fixed Income Fund	-2.70%	3.15%	2.71%		3.09%
Core Real Estate	0.49%	1.16%	0.25%		1.91%
Total Portfolio	-2.13%	1.00%	6.49%		5.27%

Change in General Pension

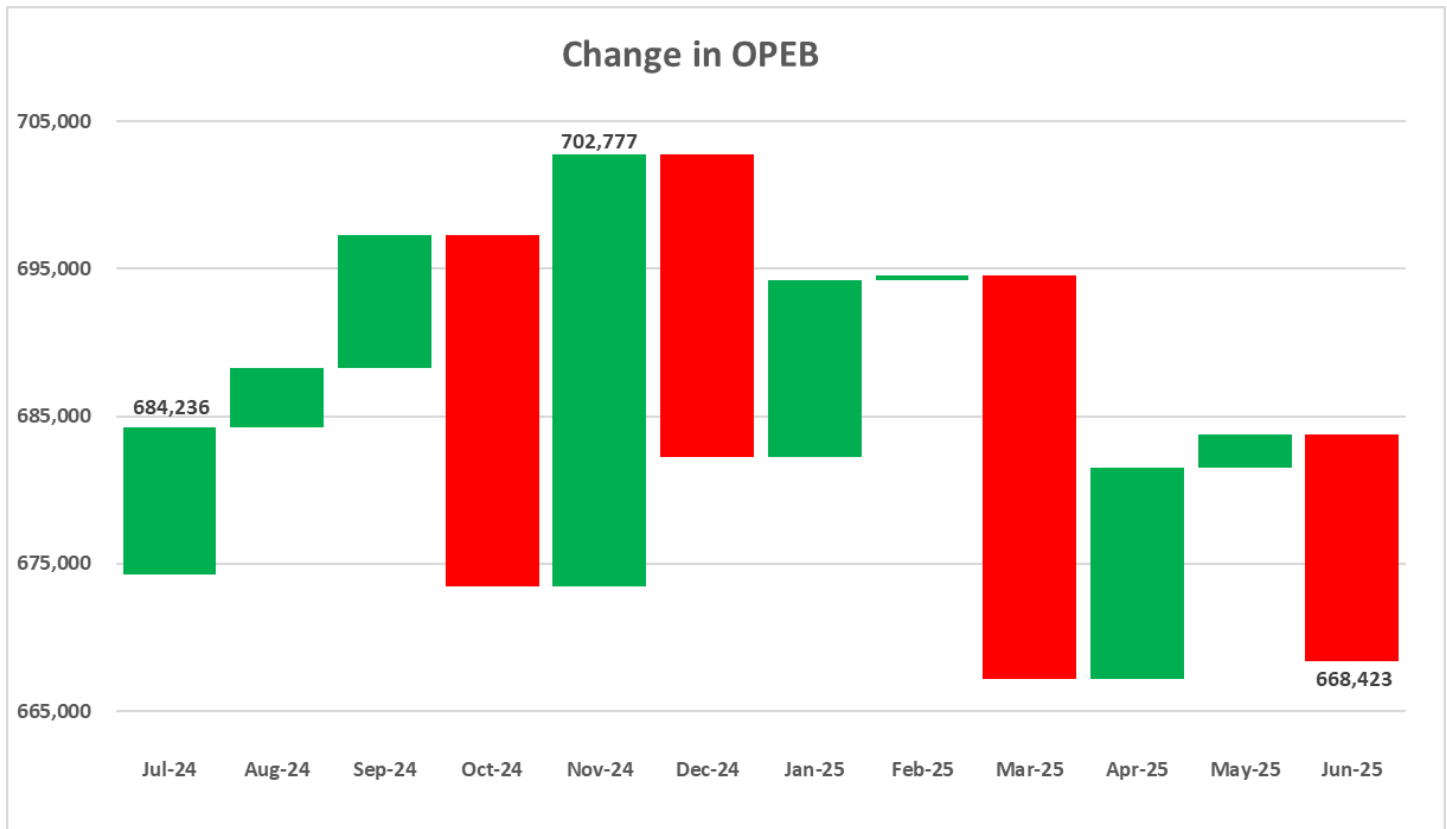


Other Post–Employment Benefits Fund Reporting through Quarter 3 2024–2025

	CONTRIBUTIONS	EARNINGS/LOSSES	DISTRIBUTIONS	FEES PAID	TOTAL	BALANCE
1st Quarter	42,313	(15,328)	(41,361)	(674)	(15,050)	682,223
2nd Quarter	33,865	8,980	(57,685)	(171)	(15,011)	667,211
3rd Quarter	10,823	38,550	(47,995)	(167)	1,211	668,423
4th Quarter						
Total	87,001	32,202	(147,041)	(1,012)	(28,851)	

RATE OF RETURN

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	YTD
Cash	3.88%	2.61%	1.92%		9.04%
Broad Market HQ Bond Fund	-3.10%	3.03%	1.36%		1.20%
Large Cap Equity	0.59%	-2.29%	8.22%		6.37%
Diversified Small to Mid Cap Portfolio	-2.96%	-4.51%	3.42%		-4.17%
International Equity Portfolio	-5.01%	5.95%	15.46%		16.20%
Core Plus Fixed Income Fund	-2.70%	3.15%	2.71%		3.09%
Core Real Estate	0.49%	1.16%	0.25%		1.91%
Total Portfolio	-2.16%	1.31%	5.75%		4.82%



Plan Information for Quarter Ending

June 30, 2025



Wauchula OPEB

Beginning Balance	\$667,211.36	Cash	\$8,689.50	1.3%
Contributions	\$10,823.30	Broad Market HQ Bond Fund	\$124,995.04	18.7%
Earnings	\$38,550.09	Core Plus Fixed Income	\$131,679.27	19.7%
Distributions	\$0.00	Diversified Large Cap	\$149,726.68	22.4%
Expenses	(\$48,162.06)	Diversified Small to Mid Cap	\$66,173.85	9.9%
Other	\$0.00	International Equity	\$129,005.58	19.3%
Ending Balance	<u>\$668,422.69</u>	Core Real Estate	\$58,152.77	8.7%

301 S. Bronough Street
P.O. Box 1757
Tallahassee, FL 32302
(800) 342 - 8112

Wauchula OPEB

Plan Account Statement for 04/01/2025 to 06/30/2025

Beginning Balance	Contributions	Earnings/(Losses)	Distributions	Fees / Req. / Exp.	Other	Ending Balance
\$667,211.36	\$10,823.30	\$38,550.09	\$0.00	(\$48,162.06)	\$0.00	\$668,422.69

Transaction Detail

Contributions

Contribution Detail							Rollover Detail				
Date	Payroll Ending	Employer	EE Pre-Tax	EE After-Tax	State Excise	Subtotal	Date	Participant	EE Pre-Tax Rollover	EE After Tax Rollover	Total
04/04/2025	04/04/2025	\$5,349.92	\$0.00	\$0.00	\$0.00	\$5,349.92					
04/15/2025	04/15/2025	\$5,452.30	\$0.00	\$0.00	\$0.00	\$5,452.30					
04/22/2025	04/22/2025	\$21.08	\$0.00	\$0.00	\$0.00	\$21.08					
Total						\$10,823.30	Total				

Fees, Requisitions and Expenses

Date	Req. Num	Description	Amount
04/01/2025	R-2025-Qtrly2-066	VENDOR: FMPTF/ DETAIL: 03/31/2025 Quarterly Fees	(\$166.80)
05/08/2025	R-2025-04-00371	VENDOR: City of Wauchula/ DETAIL: May Health Reimbursement	(\$14,428.86)
06/09/2025	R-2025-06-00459	VENDOR: City of Wauchula/ DETAIL: Health Reimbursement June 2025	(\$13,753.20)
06/30/2025	R-2025-06-00450	VENDOR: FMPTF/ DETAIL: Invoice No 643-0425 GASB 74/75 valuation as of October 1, 2023	(\$6,000.00)
06/30/2025	R-2025-06-00507	VENDOR: City of Wauchula/ DETAIL: July Health Reimbursement	(\$13,813.20)
Total			(\$48,162.06)

Other

Date	Description	Amount
Total		\$0.00

Earnings / (Losses)

Date	Amount
04/30/2025	\$3,611.90
05/31/2025	\$16,712.43
06/30/2025	\$18,225.76
Total	\$38,550.09

Distributions

Lump Sum Detail

Date	Participant	Type	Amount
Total			\$0.00

Recurring Payment Detail

Date	Participant	Amount
Total		\$0.00

Florida Municipal Pension Trust Fund – OPEB 50% Equity Allocation
Executive Summary
As of June 30, 2025

OPEB 50% Equity Allocation

- The US Fed held its benchmark rate steady at a range of 4.25% - 4.50%, but a few Fed officials have started to express support for a cut as long as inflation shows minimal response from tariff pressures. The deadline for the 90-day tariff pause looms in July, and while markets seem to have grown accustomed to higher tariffs, a widespread return to “Liberation Day” levels would be an unwelcome development. US equities rebounded in the second quarter as the S&P 500 reached a new all-time high. Non-US equity markets continued their YTD outperformance as a weaker dollar provided a tailwind. Core real estate returns maintained momentum with a 4th consecutive quarter of positive returns. However, the return is comprised almost entirely of income as price appreciation remains flat. The 50% Equity Allocation slightly trailed the Target Index in the second quarter, up 5.8% versus up 6.0%.
- Despite the lower allocation to equity, the 50% Equity Allocation has managed to earn an 10.3% return over the past year, and outpaced the performance of the Target Index over the past 5 years (up 7.1% vs. up 6.7%).
- Over the past 10 years, this allocation is up 6.3% on average annually. While this performance is modestly behind objectives, the risk controlled nature of many of the underlying strategies are designed to provide downside protection should the markets continue to moderate or decline.

FMLvT Broad Market High Quality Bond Fund

- The Broad Market High Quality Bond Fund outpaced the Bloomberg US Aggregate A+ Index in the second quarter (up 1.4% vs up 1.1%), and ranked in the top 31st percentile of its peer group of US core fixed income managers. The Fund has continued to benefit from its exposure to the ABS sector and security selection within the MBS sector. Over the past 3 years, the Fund has achieved over 40 basis points of excess return on average annually relative to the benchmark.
- The portfolio's conservative risk profile and high quality bias are in line with the objectives for this fund. This bias has rewarded investors in the form of a more favorable relative risk-adjusted return comparison over the long-term.

FMLvT Core Plus Fixed Income Fund

- The Core Plus Fixed Income Fund trailed the Bloomberg Multiverse in the second quarter, up 2.8% vs. up 4.6%, as the underweight to non-US markets slowed performance. The fund benefited from an overweight to the belly of the yield curve, notably the 5-year portion. Strong security selection within the Financials and industrial sectors continues to move the Fund forward. The fund has outpaced the benchmark by nearly 100 basis points over the past year and ranks in the top 32nd percentile of its peer group of global unconstrained fixed income managers.
- In the 10 years since inception, the Core Plus Fixed Income Fund has posted absolute returns of 2.5% on average annually, ahead of the benchmark (up 1.4%).

FMLvT Diversified Large Cap Equity Portfolio

- The fund is allocated 60% to the SSgA S&P 500 Fund, and 20% each to the Hotchkis & Wiley Diversified Value Fund and the Atlanta Capital High Quality Growth Fund. This fund provides investors with exposure to core, value, and growth opportunities within the US large cap equity marketplace. The SSgA S&P 500 Fund replaced Intech in the fourth quarter 2023.
- U.S. equities bounced back from the first quarter struggles with the S&P 500 reaching a new all-time high as investors became increasingly optimistic for trade deals. The underweight to the information technology and consumer discretionary sectors, and thus, being underweight to the Magnificent 7, continues to be a headwind as the Diversified Large Cap Equity Portfolio trailed the Russell 1000, up 8.3% vs. up 11.1%.
- The Diversified Large Cap Equity portfolio has achieved a 15.5% return on average annually over the past 5 years.

Florida Municipal Pension Trust Fund – OPEB 50% Equity Allocation
Executive Summary
As of June 30, 2025

FMIvT Diversified Small to Mid Cap Equity Fund

- The Diversified Small to Mid Cap Equity Fund trailed the benchmark in the second quarter, up 3.6% vs. up 8.6%, as lower quality factors like high beta, high valuation, and companies with negative earnings outperformed. While markets have become more optimistic, economic factors like growing budget deficits, unsettled tariff policy and persistent inflation remain real concerns. Despite the difficulties facing the asset class, the Fund outpaced the benchmark by 160 basis points over the past 5 years.
- This strategy has generated very strong results over the past 10 years, rising 11.9% on average annually compared with 8.4% for the benchmark. Furthermore, the fund ranked in the top 12th percentile of its peer group, with a more modest risk profile and very strong risk-adjusted returns.

FMIvT International Equity Portfolio

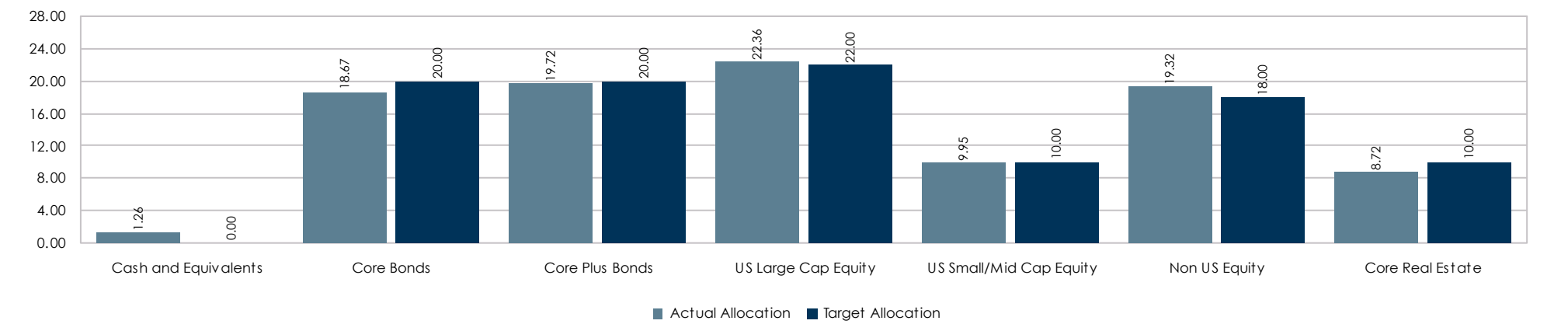
- The FMIvT International Equity Portfolio's momentum continued in the second quarter with the fund rising 15.6% vs. up 12.0% for the MSCI ACWI ex US – Net benchmark, and ranking in the top 19th percentile of its peer group universe. Non-US equity markets outperformed their US counterparts as a weaker dollar provided a tailwind. Stock picking in industrials and IT, as well as in Germany and Switzerland, drove performance the most in the quarter. The fund has outpaced the benchmark by over 330 basis points over the past year (up 21.1% vs. up 17.7%). The portfolio has outperformed the benchmark over all longer term time periods.
- This strategy is intended to provide strong diversification across the broad spectrum of equity markets outside the US, with exposure to both developed and emerging markets.

FMIvT Core Real Estate Portfolio

- In early 2023, a \$50 million redemption was submitted in order to rebalance the portfolio with the proceeds scheduled to be paid out over several quarters. This will reduce the total commitment to \$100 million once all the proceeds are received.
- Core real estate returns maintained momentum with a fourth consecutive quarter of positive returns. However, the return is comprised almost entirely of income as price appreciation remains flat. While rising 3.4% over the trailing one year, the FMIvT Core Real Estate portfolio significantly outperformed the benchmark (up 2.7%). Commercial real estate seems to have stabilized overall even as office vacancy rates remain elevated. A resumption of Fed rate cutting could act as a catalyst for transaction volume and price appreciation.
- The portfolio has outperformed the NFI ODCE Net benchmark over the past 5 years and has achieved nearly 300 basis points of excess return over the benchmark over the past 7 years.

Total Portfolio

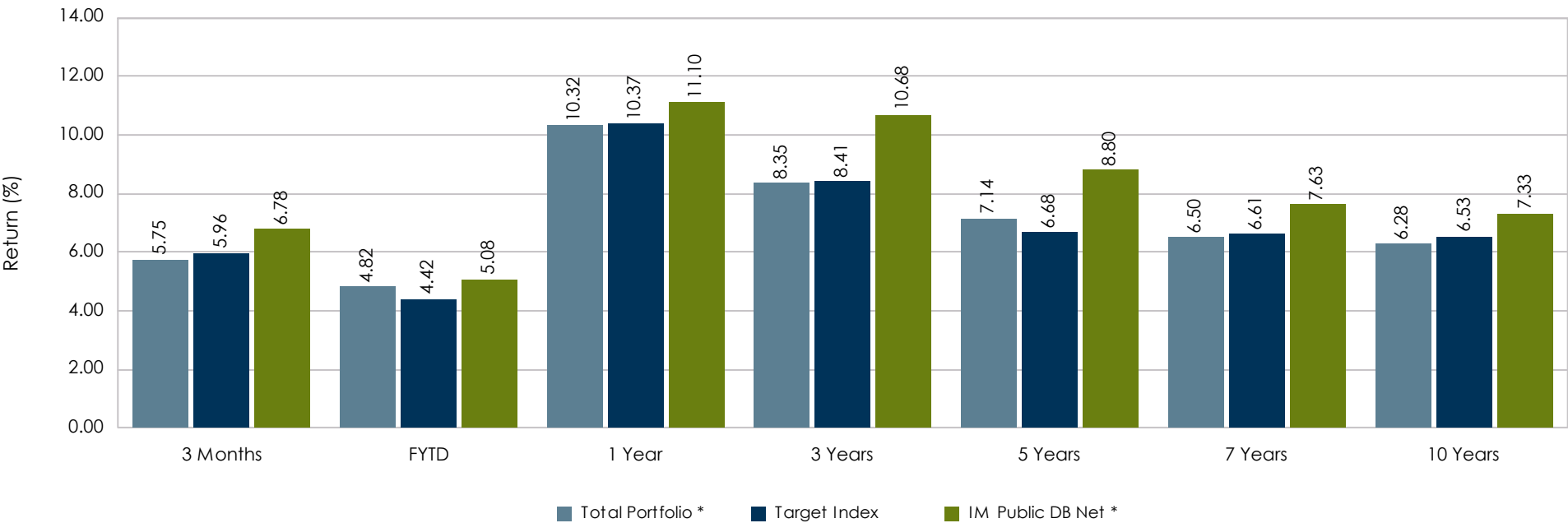
For the Period Ending June 30, 2025



	Market Value (\$000s)	Actual Allocation (%)	Target Allocation (%)	Over/Under Target (%)
Total Portfolio	33,120	100.00	100.00	
Cash and Equivalents	419	1.26	0.00	1.26
Fixed Income	12,716	38.39	40.00	-1.61
Core Bonds	6,183	18.67	20.00	-1.33
Core Plus Bonds	6,533	19.72	20.00	-0.28
Equity	17,098	51.62	50.00	1.62
US Equity	10,700	32.31	32.00	0.31
US Large Cap Equity	7,406	22.36	22.00	0.36
US Small/Mid Cap Equity	3,294	9.95	10.00	-0.05
Non US Equity	6,398	19.32	18.00	1.32
Core Real Estate	2,888	8.72	10.00	-1.28

Total Portfolio

For the Periods Ending June 30, 2025

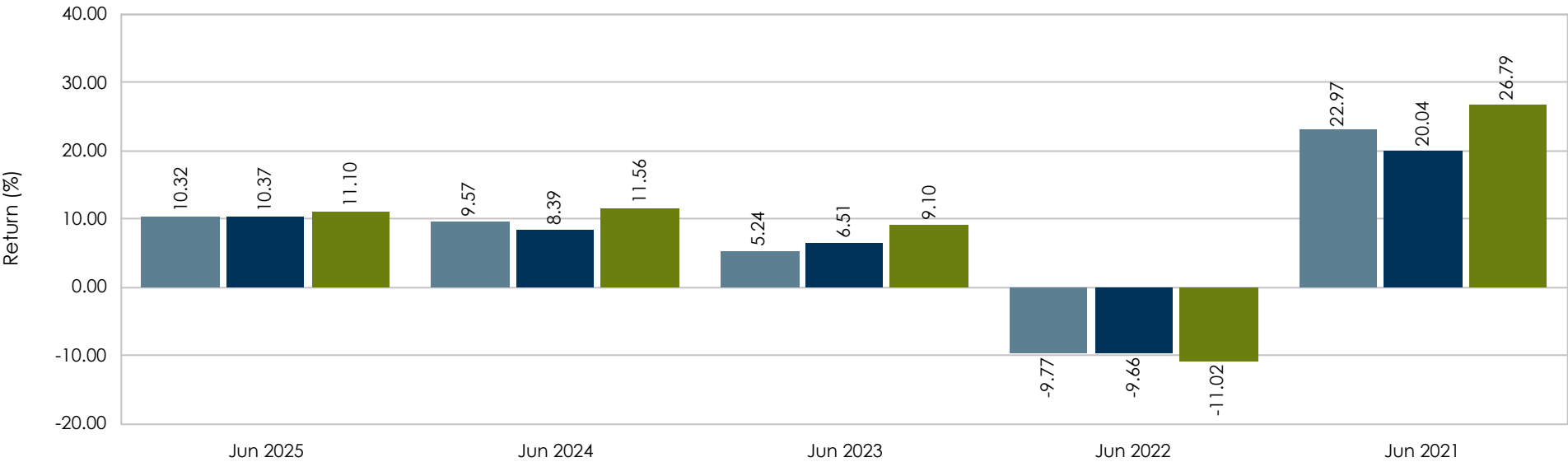


Ranking	80	60	70	88	92	84	86
5th Percentile	8.29	6.86	12.84	12.88	10.57	9.11	8.68
25th Percentile	7.40	5.86	11.85	11.36	9.54	8.20	7.85
50th Percentile	6.78	5.08	11.10	10.68	8.80	7.63	7.33
75th Percentile	5.97	4.29	10.00	9.38	8.08	6.77	6.69
95th Percentile	3.89	2.71	7.91	7.35	6.42	5.75	5.38
Observations	243	242	242	228	217	200	170

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Total Portfolio

For the One Year Periods Ending June

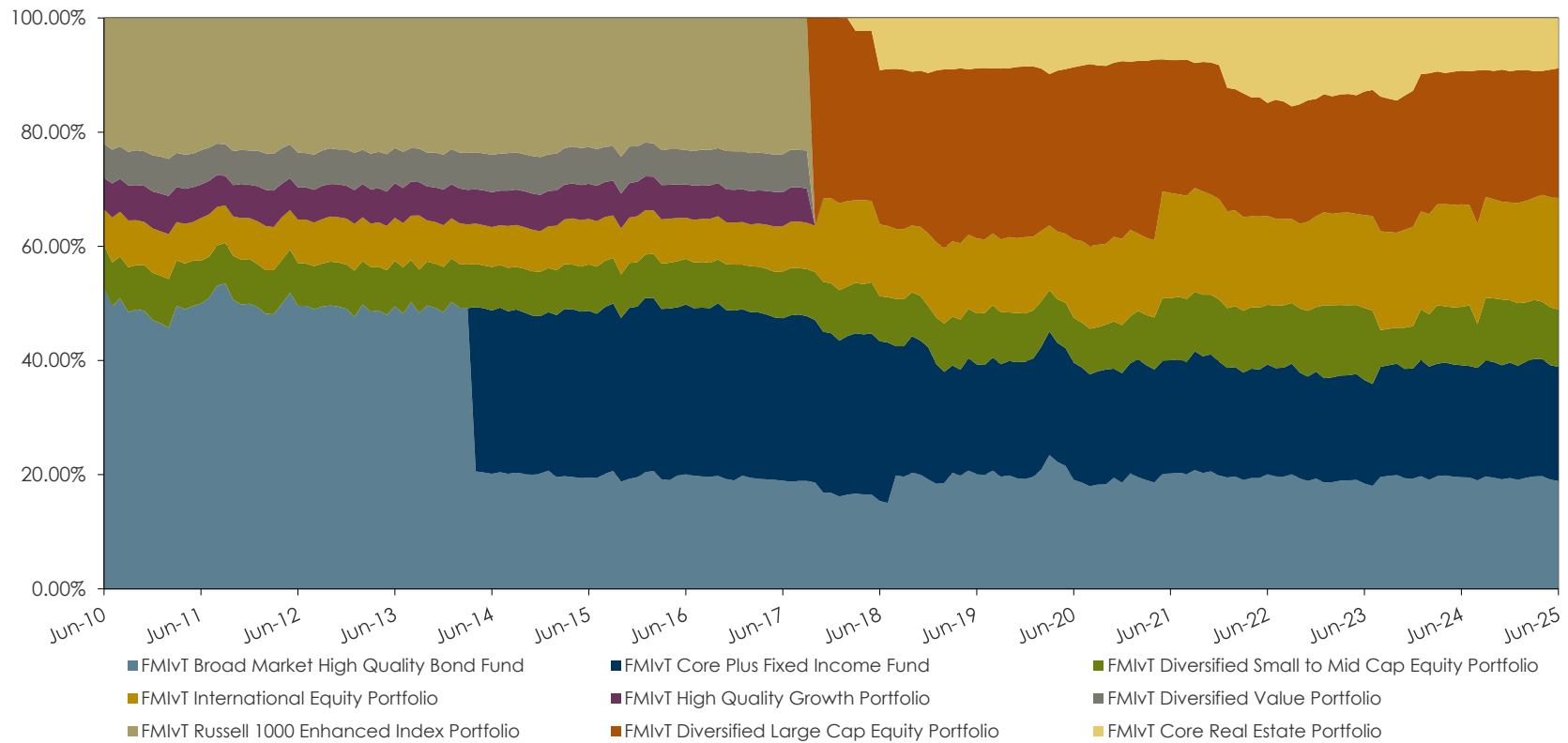


■ Total Portfolio * ■ Target Index ■ IM Public DB Net *

Ranking	70	78	97	34	88
5th Percentile	12.84	15.78	12.32	-4.42	31.65
25th Percentile	11.85	12.93	10.30	-8.87	28.62
50th Percentile	11.10	11.56	9.10	-11.02	26.79
75th Percentile	10.00	9.83	7.80	-12.92	24.56
95th Percentile	7.91	7.26	5.74	-15.52	20.33
Observations	242	554	543	585	603

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Total Portfolio Historical Manager Allocation



May 2009: Initial allocation to Broad Market HQ Bond, HQ Growth Equity, Large Cap Value, Russell 1000, Small Cap, and International.

April 2014: Added Core Plus Fixed Income.

October 2017: FMIVT Diversified Large Cap Equity Portfolio was created, which combines the large cap core, value, and growth portfolios.

March 2018: Added Core Real Estate Portfolio.

Performance vs. Objectives

For the Periods Ending June 30, 2025

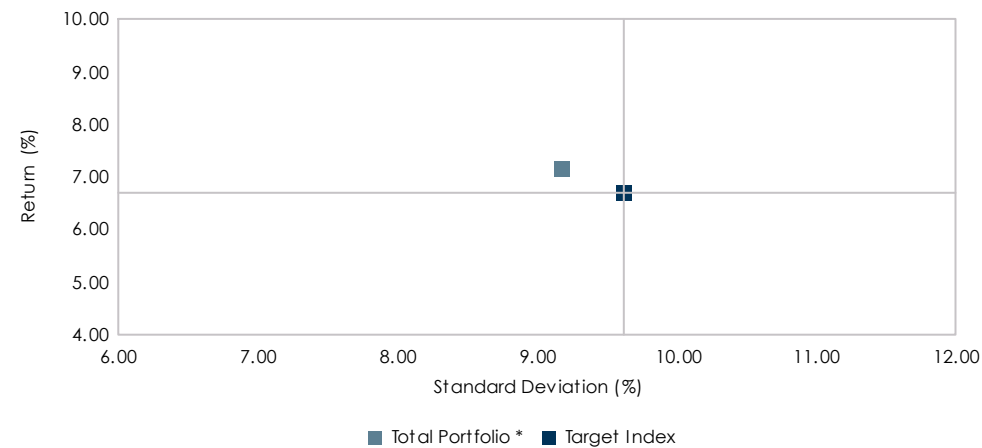
	Benchmark (%)	Rank	Total Portfolio (%)	Rank	Objective Met?	Benchmark (%)	Rank	Total Portfolio (%)	Rank	Objective Met?
	5 Years					10 Years				
■ The Total Portfolio's annualized total return should exceed the total return of the Target Index.	6.68		7.14 *		Yes	6.53		6.28 *		No
■ The Total Portfolio's annualized total return should rank at median or above when compared to the IM Public DB Net universe.	8.80 *	50th	7.14 *	92nd	No	7.33 *	50th	6.28 *	86th	No

Performance and Statistics are calculated using monthly return data. * Indicates net of fee data.
Target Index: Effective April 2021, the index consists of 40.00% Bloomberg US Aggregate, 22.00% S&P 500, 10.00% Russell 2500, 18.00% MSCI ACWI ex US NetDiv, 10.00% NFI ODCE Net.
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Total Portfolio

For the Periods Ending June 30, 2025

5 Year Risk / Return



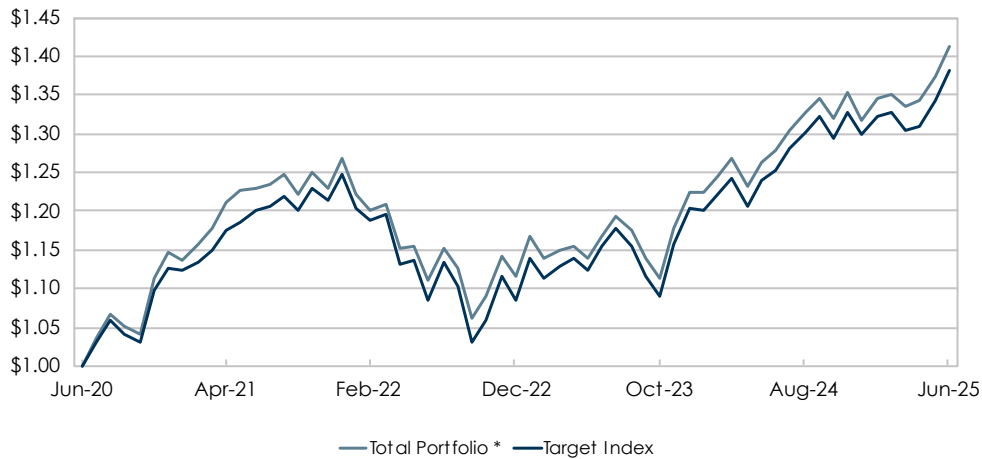
5 Year Portfolio Statistics

	Total Portfolio *	Target Index
Return (%)	7.14	6.68
Standard Deviation (%)	9.18	9.62
Sharpe Ratio	0.47	0.40

Benchmark Relative Statistics

Beta	0.95
Up Capture (%)	98.79
Down Capture (%)	95.10

5 Year Growth of a Dollar



5 Year Return Analysis

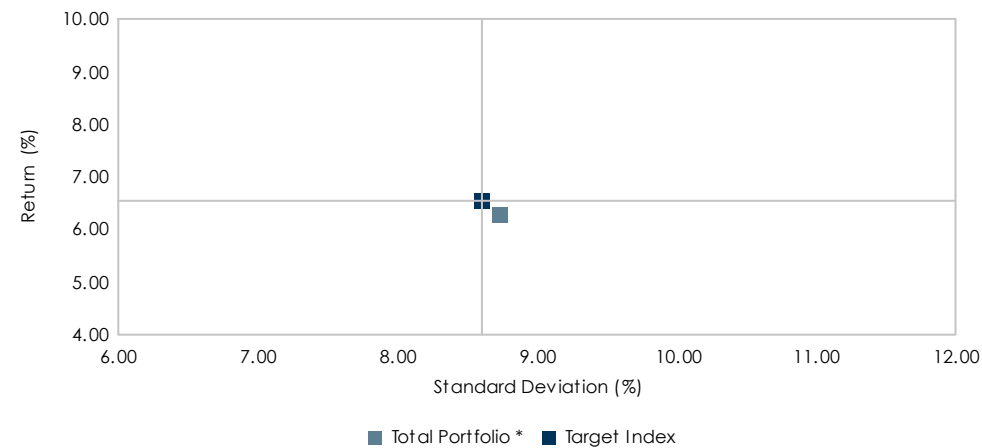
	Total Portfolio *	Target Index
Number of Months	60	60
Highest Monthly Return (%)	6.93	6.62
Lowest Monthly Return (%)	-5.71	-6.47
Number of Positive Months	39	38
Number of Negative Months	21	22
% of Positive Months	65.00	63.33

* Performance is calculated using net of fee returns.
Statistics are calculated using monthly return data.
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Total Portfolio

For the Periods Ending June 30, 2025

10 Year Risk / Return



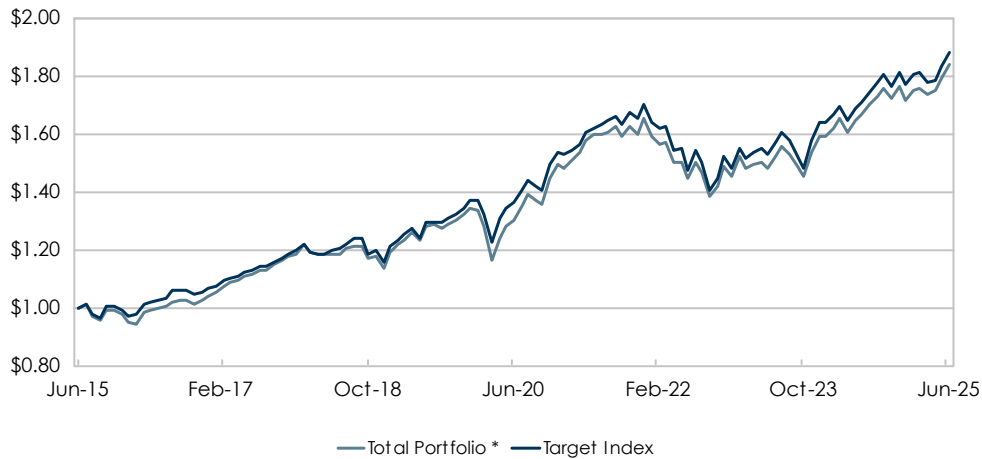
10 Year Portfolio Statistics

	Total Portfolio *	Target Index
Return (%)	6.28	6.53
Standard Deviation (%)	8.73	8.60
Sharpe Ratio	0.50	0.53

Benchmark Relative Statistics

Beta	1.00
Up Capture (%)	100.04
Down Capture (%)	102.39

10 Year Growth of a Dollar



10 Year Return Analysis

	Total Portfolio *	Target Index
Number of Months	120	120
Highest Monthly Return (%)	6.93	6.62
Lowest Monthly Return (%)	-9.03	-7.36
Number of Positive Months	82	85
Number of Negative Months	38	35
% of Positive Months	68.33	70.83

* Performance is calculated using net of fee returns.
Statistics are calculated using monthly return data.
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Rates of Return Summary

For the Periods Ending June 30, 2025

	Market Value (\$000s)	Actual Allocation (%)	3 Months (%)	FYTD (%)	1 Year (%)	3 Years (%)	5 Years (%)	10 Years (%)
Total Portfolio * 1	33,120	100.00	5.75	4.82	10.32	8.35	7.14	6.28
Target Index 2			5.96	4.42	10.37	8.41	6.68	6.53
Cash and Equivalents	419	1.26						
FMPTF Operating	57	0.17						
FMPTF Capital City *	361	1.09	1.92	9.04	9.99	--	--	--
US T-Bills 90 Day			1.04	3.27	4.68	4.56	2.76	1.98
Fixed Income	12,716	38.39						
Core Bonds								
FMlvt Broad Market High Quality Bond Fund *	6,183	18.67	1.36	1.20	6.28	2.30	-0.70	1.46
Bloomberg US Aggregate A+			1.10	0.76	5.91	2.19	-0.97	1.51
Core Plus Bonds								
FMlvt Core Plus Fixed Income Fund * 3	6,533	19.72	2.71	3.09	9.52	5.41	2.08	1.94
Bloomberg Multiverse			4.55	1.97	9.08	3.10	-0.87	1.36
Equity	17,098	51.62						
US Equity	10,700	32.31						
US Large Cap Equity * 4	7,406	22.36	8.22	6.37	12.65	16.57	14.86	11.82
S&P 500			10.94	8.76	15.16	19.71	16.64	13.65
FMlvt Diversified Large Cap Equity Portfolio *	7,406	22.36	8.21	6.37	12.65	16.58	14.84	--
Russell 1000			11.11	9.03	15.66	19.59	16.30	13.35
US Small/Mid Cap Equity								
FMlvt Diversified SMID Cap Equity Portfolio * 5	3,294	9.95	3.42	-4.17	5.75	11.93	12.35	11.24
SMID Benchmark 6			8.59	1.06	9.91	11.31	11.44	8.39
Non-US Equity								
FMlvt International Equity Portfolio * 7	6,398	19.32	15.46	16.20	20.32	15.36	10.32	6.26
MSCI ACWI ex US NetDiv			12.03	8.94	17.72	13.99	10.13	6.12

FYTD: Fiscal year ending September.

* Net of fee return data.

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Rates of Return Summary

For the Periods Ending June 30, 2025

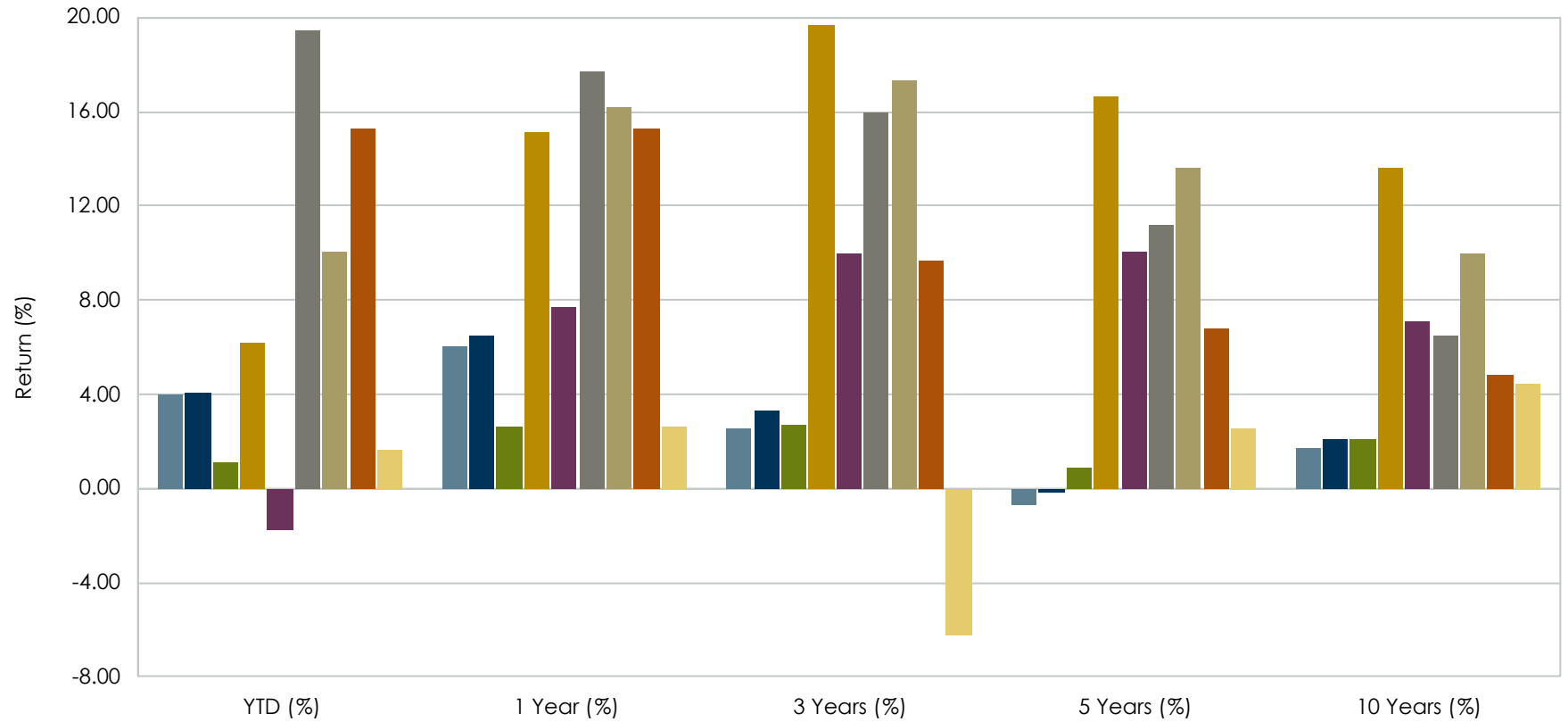
	Market Value (\$000s)	Actual Allocation (%)	3 Months (%)	FYTD (%)	1 Year (%)	3 Years (%)	5 Years (%)	10 Years (%)
Core Real Estate	2,888	8.72						
FMIvT Core Real Estate Portfolio * ⁸	2,888	8.72	0.25	1.91	2.09	-3.17	4.42	--
<i>NFI ODCE Net</i>			<i>0.81</i>	<i>2.64</i>	<i>2.66</i>	<i>-6.22</i>	<i>2.54</i>	<i>4.42</i>

Notes:

- ¹ Market values and Total Portfolio performance includes all fees and expenses. Beginning July 2008 and ending September 2010, the net of fee performance includes the impact of securities lending activity, which may increase or decrease the total expenses of the portfolio.
- ² Target Index: Effective April 2021, the index consists of 40.00% Bloomberg US Aggregate, 22.00% S&P 500, 10.00% Russell 2500, 18.00% MSCI ACWI ex US NetDiv, 10.00% NFI ODCE Net.
- ³ The performance inception date of the FMIvT Core Plus Fixed Income Fund is 4/1/2014.
- ⁴ Represents the FMPTF Large Cap Equity Composite net of fees returns.
- ⁵ Custom Index consists of the Russell 2500 beginning June 1, 2010, and prior to that the Russell 2000.
- ⁶ SMID Benchmark: Effective June 2010, the index consists of 100.0% Russell 2500.
- ⁷ Allspring EM was added to the portfolio in October 2017. Portfolio renamed and manager changed in October 2014 and April 2011.
- ⁸ The performance inception date of the FMIvT Core Real Estate Portfolio is 4/1/2018.

Market Environment

For the Periods Ending June 30, 2025



Bloomberg US Aggregate	4.02
Bloomberg Universal	4.10
Bloomberg 1-15 Yr Municipal	1.09
S&P 500	6.20
Russell 2000	-1.79
MSCI EAFE NetDiv	19.45
MSCI ACWI NetDiv	10.05
MSCI EM NetDiv	15.27
NFI ODCE Net	1.67

YTD (%)	6.08
1 Year (%)	6.51
3 Years (%)	2.55
5 Years (%)	-0.73
10 Years (%)	1.76

1 Year (%)	2.63
3 Years (%)	3.28
5 Years (%)	-0.15
10 Years (%)	2.11

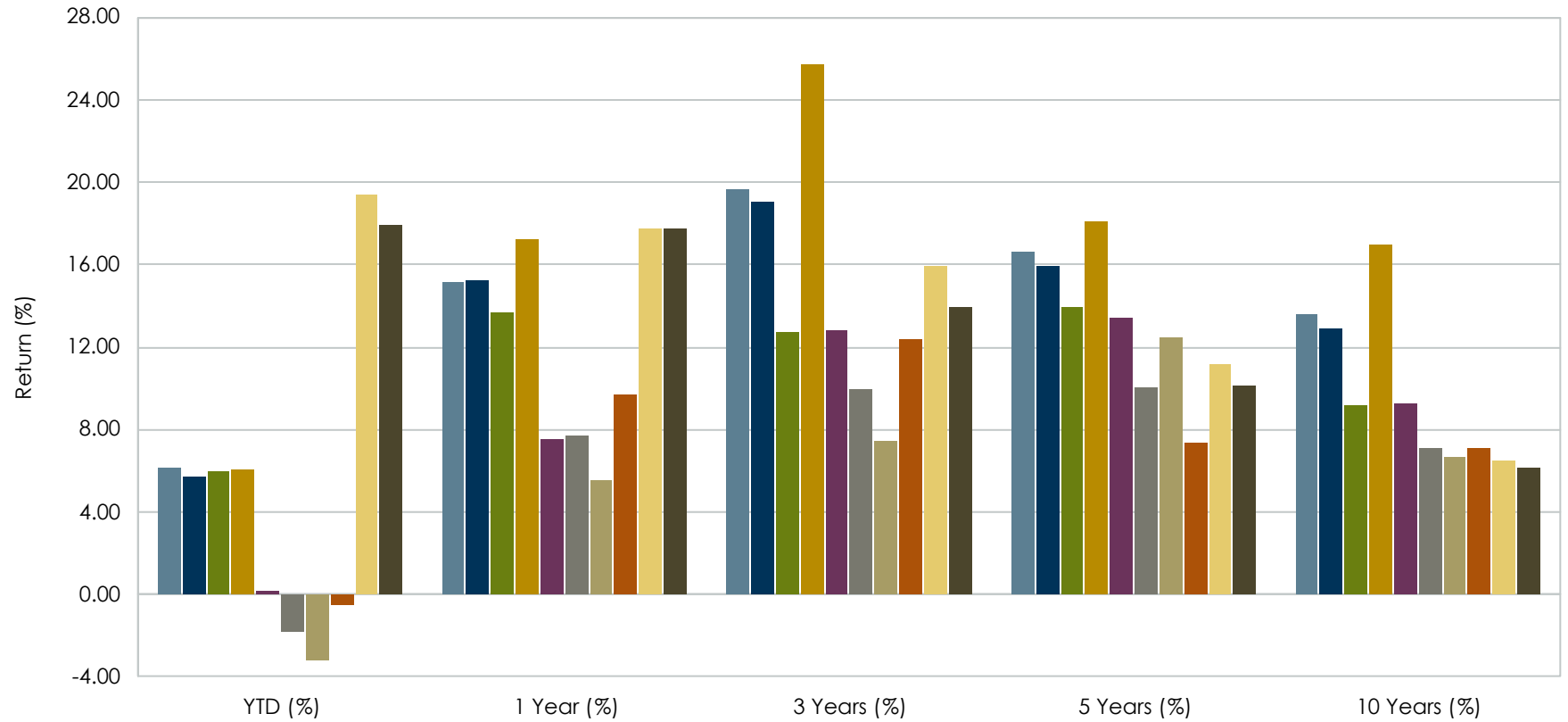
3 Years (%)	2.70
5 Years (%)	0.86
10 Years (%)	2.13

5 Years (%)	10.04
10 Years (%)	7.12

10 Years (%)	6.51
	9.99
	4.81
	4.42

Equity Index Returns

For the Periods Ending June 30, 2025

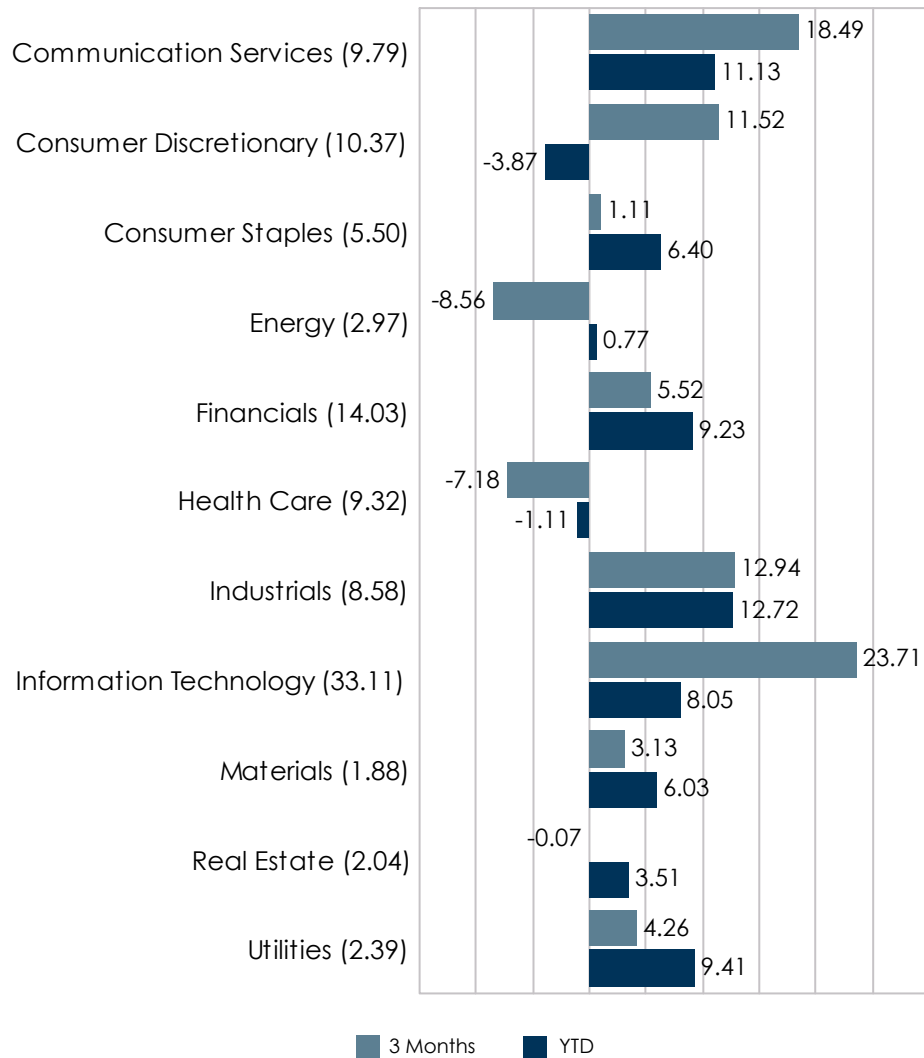


S&P 500	6.20	15.16	19.71	16.64	13.65
Russell 3000	5.75	15.30	19.08	15.96	12.96
Russell 1000 Value	6.00	13.70	12.76	13.93	9.19
Russell 1000 Growth	6.09	17.22	25.76	18.15	17.01
S&P Mid Cap 400	0.20	7.53	12.83	13.44	9.25
Russell 2000	-1.79	7.68	10.00	10.04	7.12
Russell 2000 Value	-3.16	5.54	7.45	12.47	6.72
Russell 2000 Growth	-0.48	9.73	12.38	7.42	7.14
MSCI EAFE NetDiv	19.45	17.73	15.97	11.16	6.51
MSCI ACWI ex US NetDiv	17.90	17.72	13.99	10.13	6.12

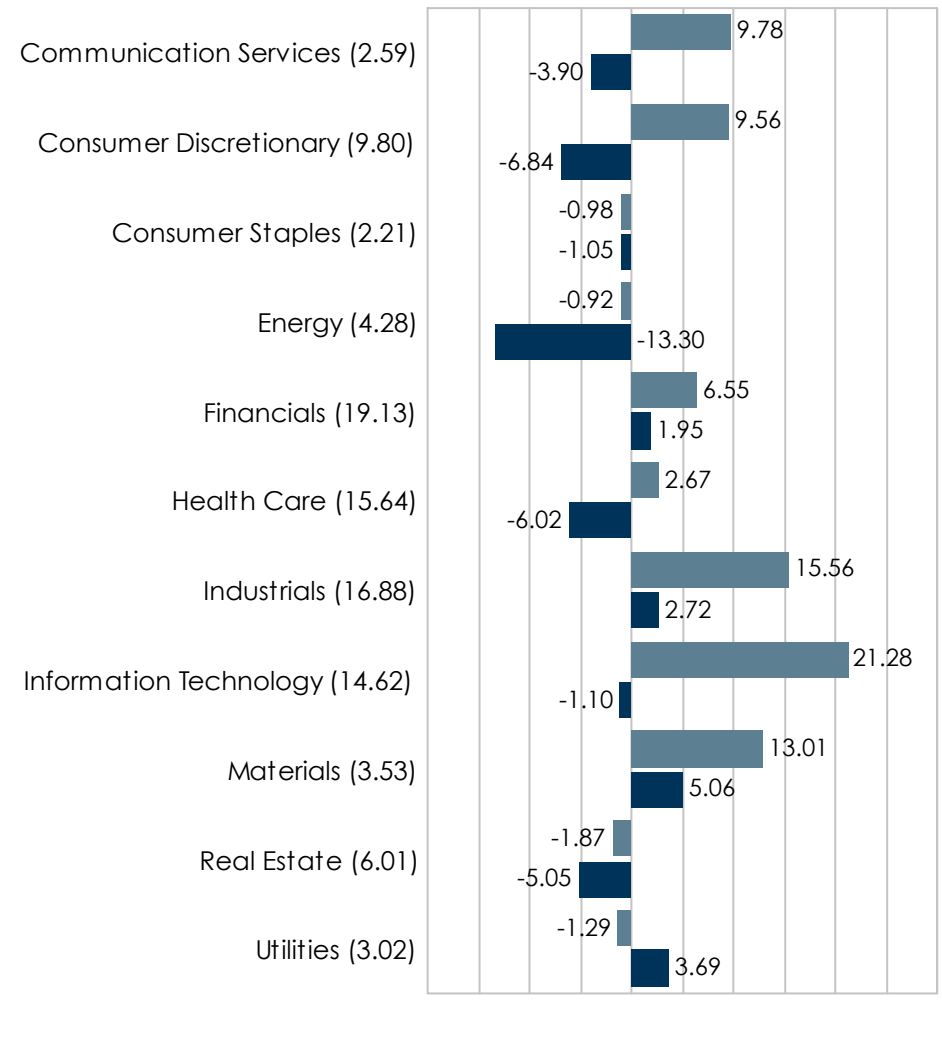
US Markets - Performance Breakdown

For the Periods Ending June 30, 2025

S&P 500 - Sector Returns (%)



Russell 2000 - Sector Returns (%)



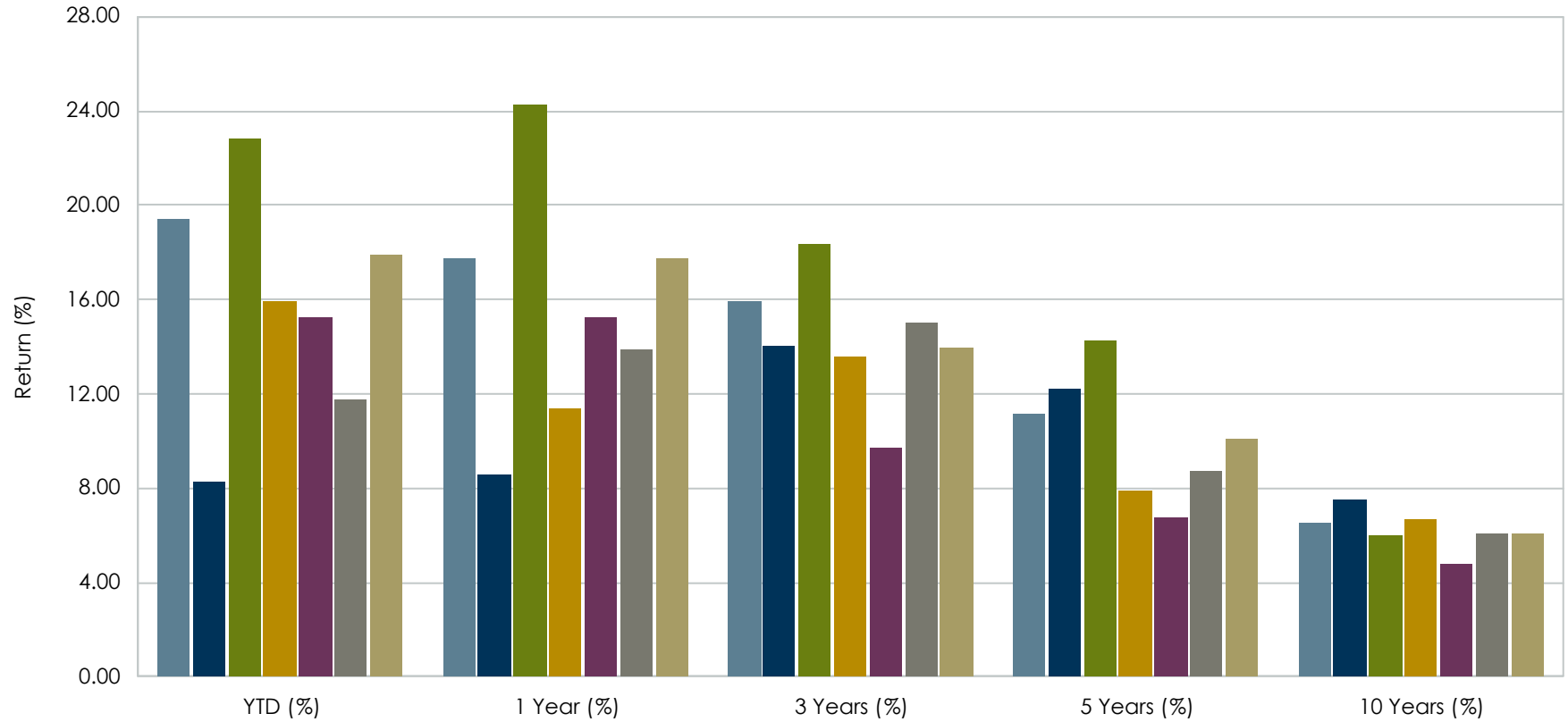
Numbers in parenthesis represent sector weightings of the index. Sector weights may not add to 100% due to rounding or securities that are not assigned to a Global Industry Classification Standard (GICS) sector.

Source: ACG Research, Bloomberg

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Non-US Equity Index Returns

For the Periods Ending June 30, 2025



MSCI EAFE NetDiv	19.45
MSCI EAFE Local Currency	8.26
MSCI EAFE Value NetDiv	22.84
MSCI EAFE Growth NetDiv	15.96
MSCI EM NetDiv	15.27
MSCI Japan NetDiv	11.73
MSCI ACWI ex US NetDiv	17.90

17.73
8.60
24.24
11.39
15.29
13.88
17.72

15.97
14.05
18.38
13.57
9.70
15.03
13.99

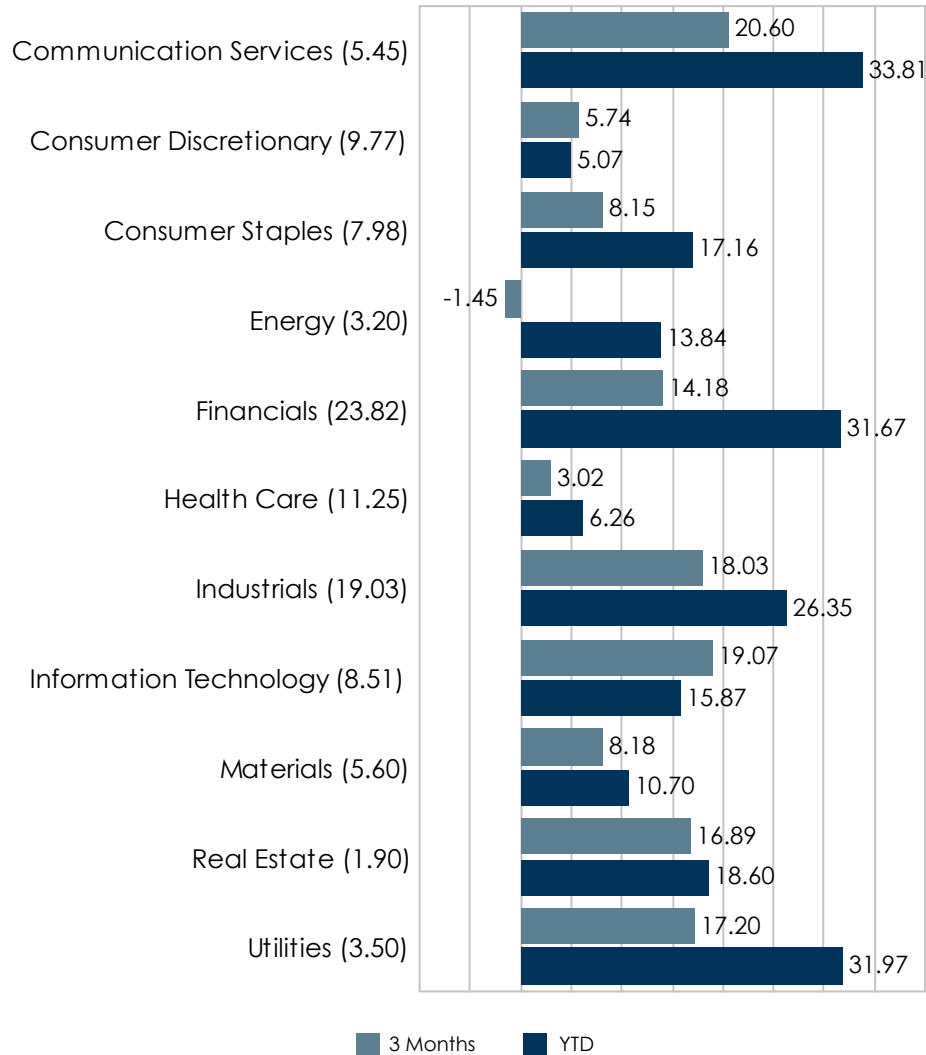
11.16
12.20
14.29
7.90
6.81
8.76
10.13

6.51
7.57
6.05
6.70
4.81
6.07
6.12

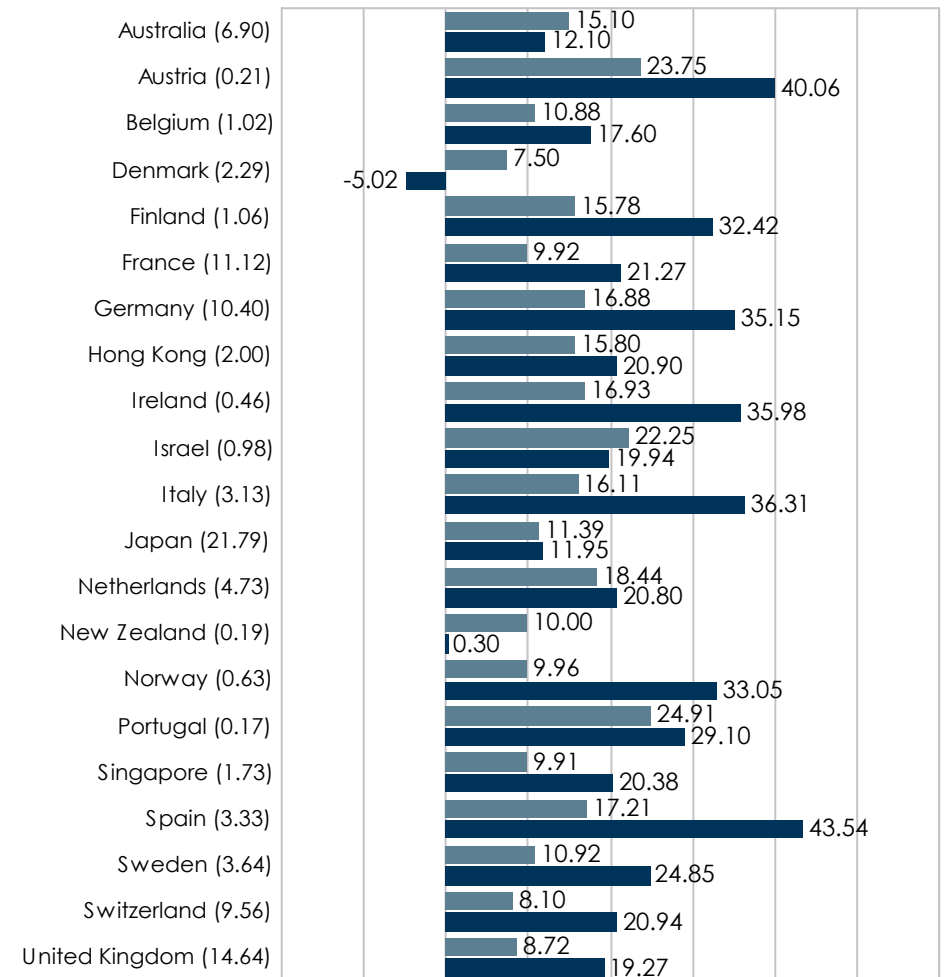
Non-US Equity - Performance Breakdown

For the Periods Ending June 30, 2025

MSCI EAFE - Sector Returns (%)



MSCI EAFE - Country Returns (%)



Numbers in parenthesis represent sector or country weights of the index. Sector or country weights may not add to 100% due to rounding.

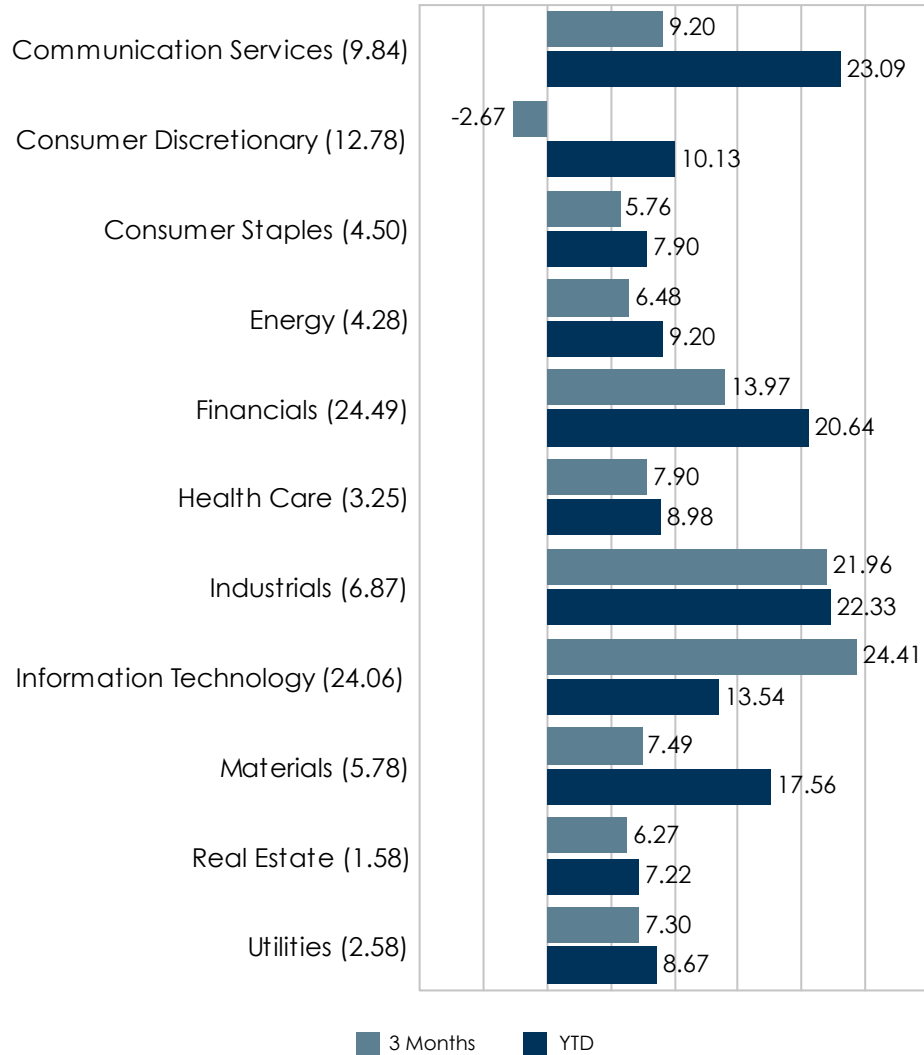
Source: ACG Research, Bloomberg

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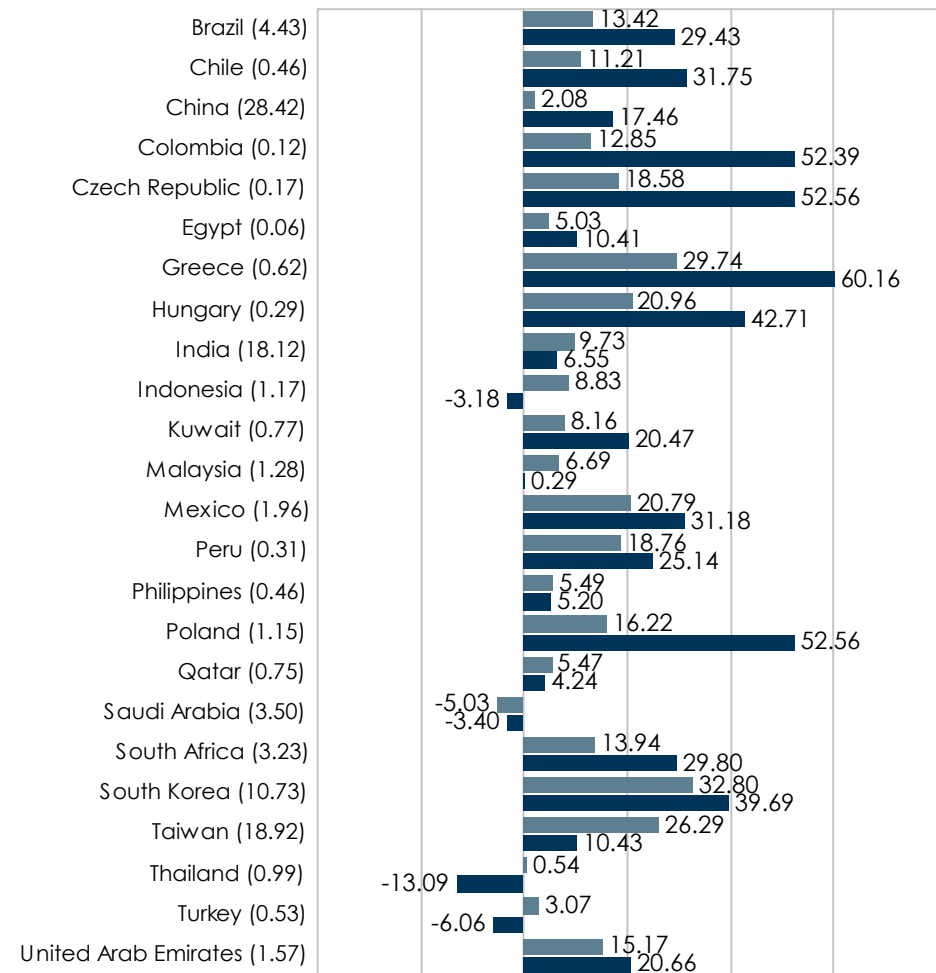
Emerging Markets - Performance Breakdown

For the Periods Ending June 30, 2025

MSCI Emerging Markets - Sector Returns (%)



MSCI Emerging Markets - Country Returns (%)



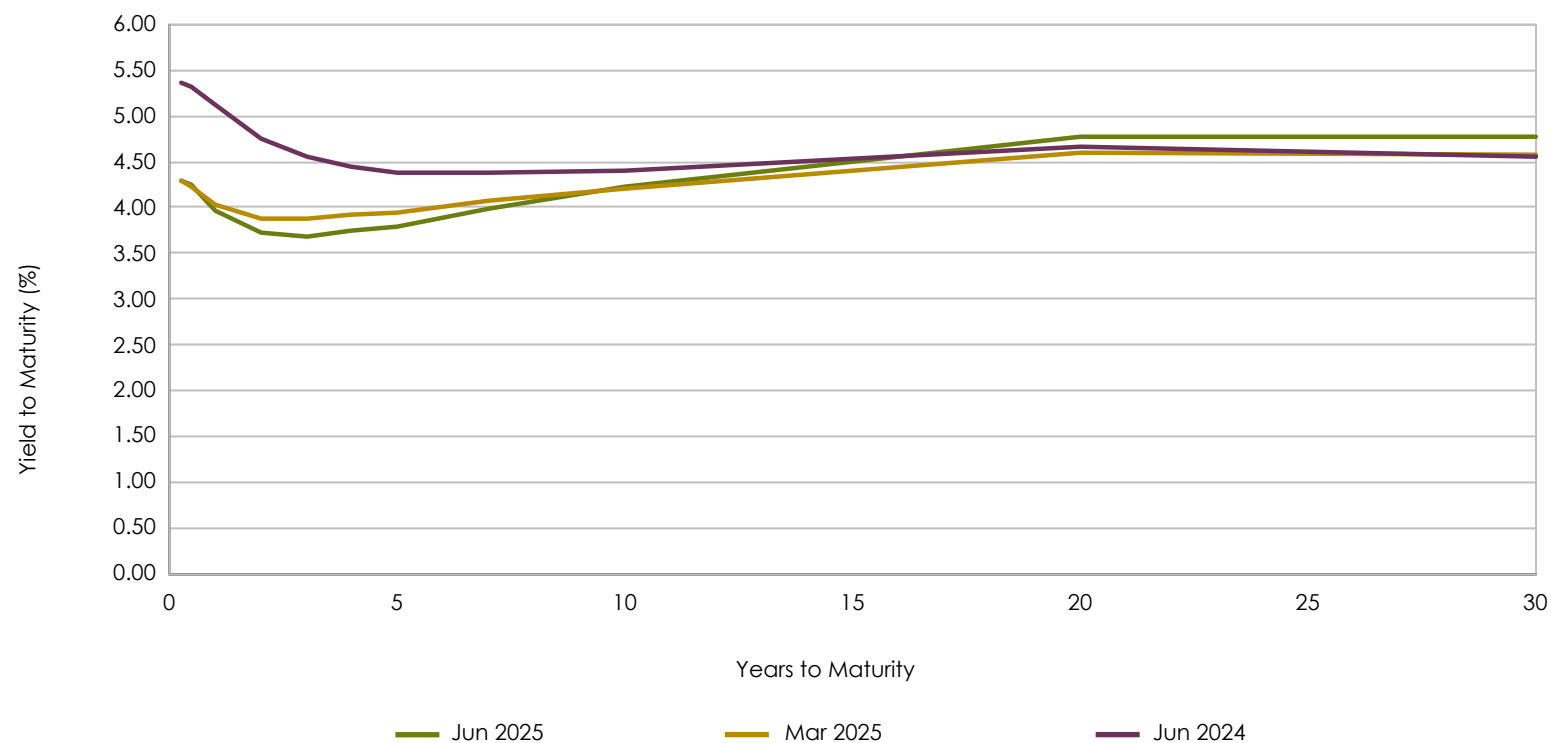
Numbers in parenthesis represent sector or country weights of the index. Sector or country weights may not add to 100% due to rounding.

Source: ACG Research, Bloomberg

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Interest Rate Term Structure

Government Issues - 3 Months to 30 Years Maturity

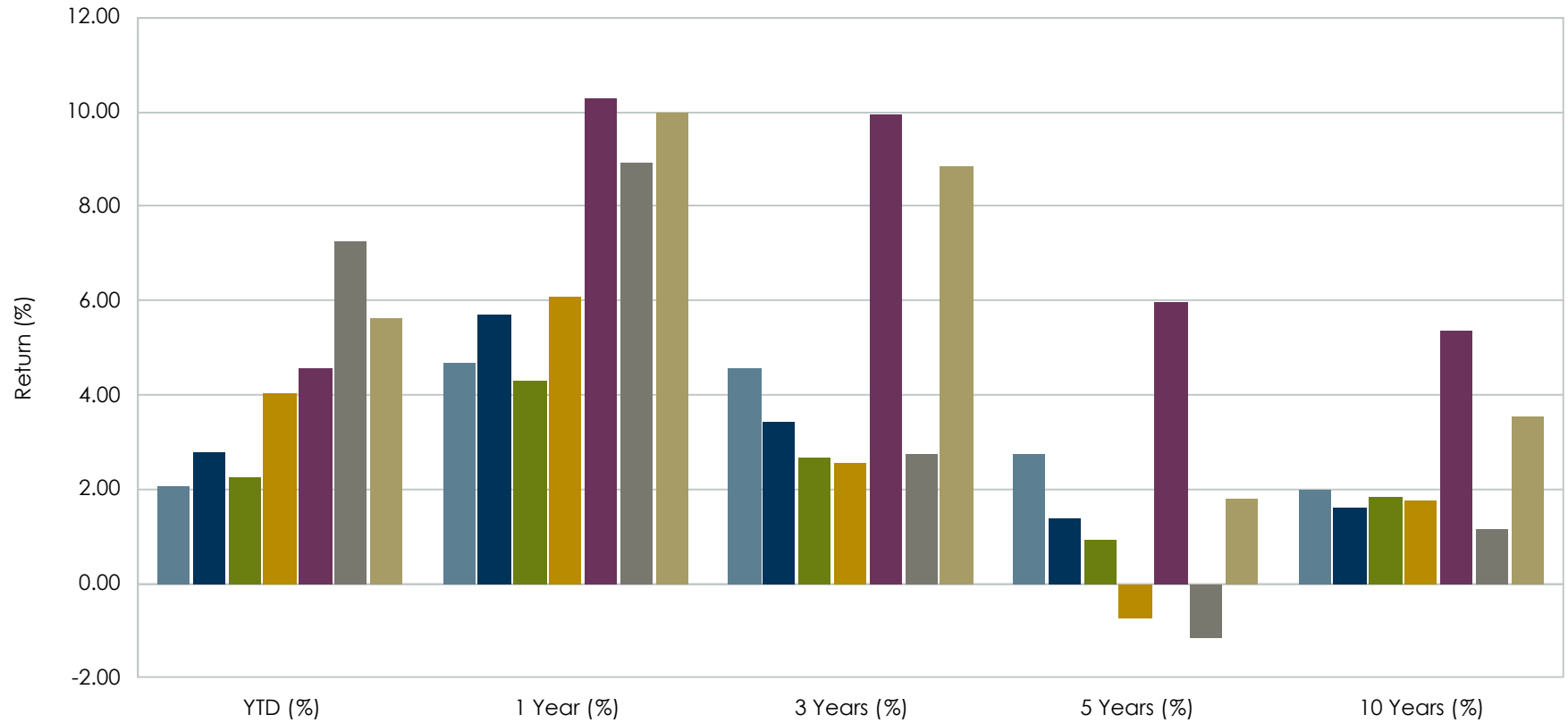


90 Days	4.30	4.30	5.36
180 Days	4.25	4.23	5.33
1 Year	3.97	4.03	5.12
2 Years	3.72	3.89	4.75
3 Years	3.69	3.88	4.55
4 Years	3.75	3.92	4.45
5 Years	3.80	3.95	4.38
7 Years	3.99	4.08	4.37
10 Years	4.23	4.21	4.40
20 Years	4.78	4.60	4.66
30 Years	4.78	4.57	4.56

Source: Bloomberg

Fixed Income Index Returns

For the Periods Ending June 30, 2025



US T-Bills 90 Day	2.07	4.68	4.56	2.76	1.98
ICE BofA 1-3 Yr Treasury	2.79	5.69	3.42	1.37	1.61
Bloomberg 5 Yr Municipal	2.27	4.29	2.66	0.93	1.84
Bloomberg US Aggregate	4.02	6.08	2.55	-0.73	1.76
Bloomberg US Corp High Yield	4.57	10.29	9.93	5.97	5.38
Bloomberg Global Aggregate	7.27	8.91	2.75	-1.16	1.17
JPM EMBI Global Diversified	5.64	9.97	8.86	1.79	3.53

US Fixed Income Market Environment

For the Periods Ending June 30, 2025

Nominal Returns By Sector (%)

	<u>3 Months</u>	<u>YTD</u>	<u>1 Year</u>	<u>3 Years</u>
US Aggregate	1.20	4.02	6.08	2.55
US Treasury	0.84	3.79	5.30	1.53
US Agg: Gov't-Related	1.70	4.37	6.21	3.22
US Corporate IG	1.83	4.18	6.89	4.34
MBS	1.15	4.23	6.52	2.32
CMBS	1.88	4.49	7.73	3.84
ABS	1.38	2.93	6.32	4.31
US Corp High Yield	3.53	4.57	10.28	9.93

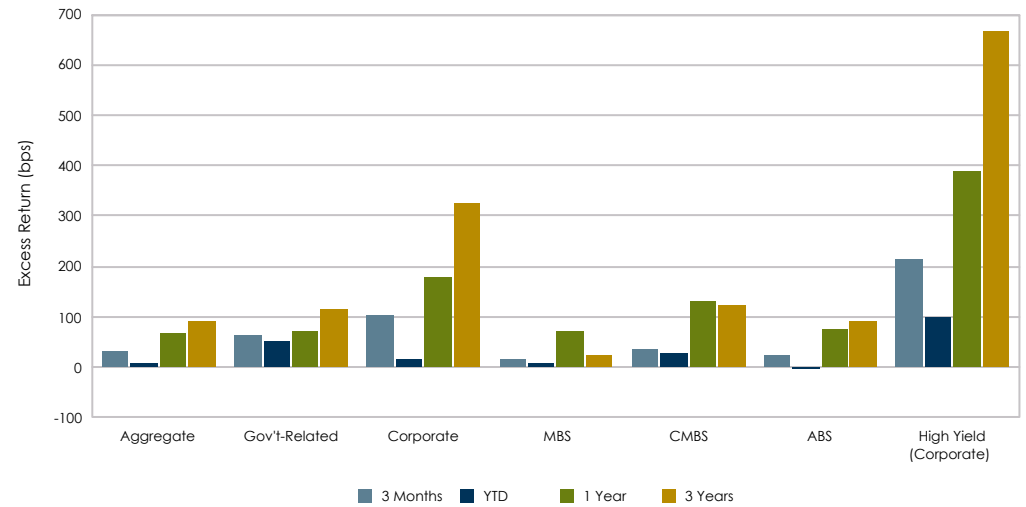
Nominal Returns by Quality (%)

	<u>3 Months</u>	<u>YTD</u>	<u>1 Year</u>	<u>3 Years</u>
AAA	1.61	4.00	6.61	2.61
AA	0.97	3.94	5.75	2.45
A	1.79	4.23	6.67	3.76
BAA	1.99	4.32	7.30	5.12
BA	3.44	4.98	8.91	8.85
B	3.62	4.39	9.47	9.96
CAA	4.01	3.56	16.71	12.65

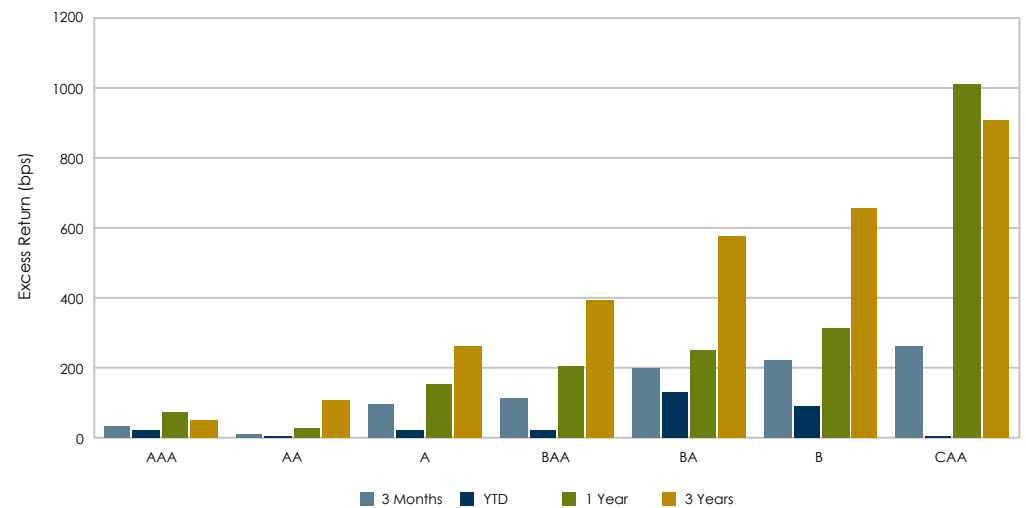
Nominal Returns by Maturity (%)

	<u>3 Months</u>	<u>YTD</u>	<u>1 Year</u>	<u>3 Years</u>
1-3 Yr.	1.26	2.91	5.94	3.77
3-5 Yr.	1.79	4.42	7.12	3.67
5-7 Yr.	1.83	4.96	7.17	3.13
7-10 Yr.	1.38	4.55	6.44	2.13
10+ Yr.	-0.12	3.28	3.25	-0.59

Excess Returns by Sector



Excess Returns by Quality



Source: Bloomberg

Excess returns are relative to the duration-neutral Treasury.

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FMIvT Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

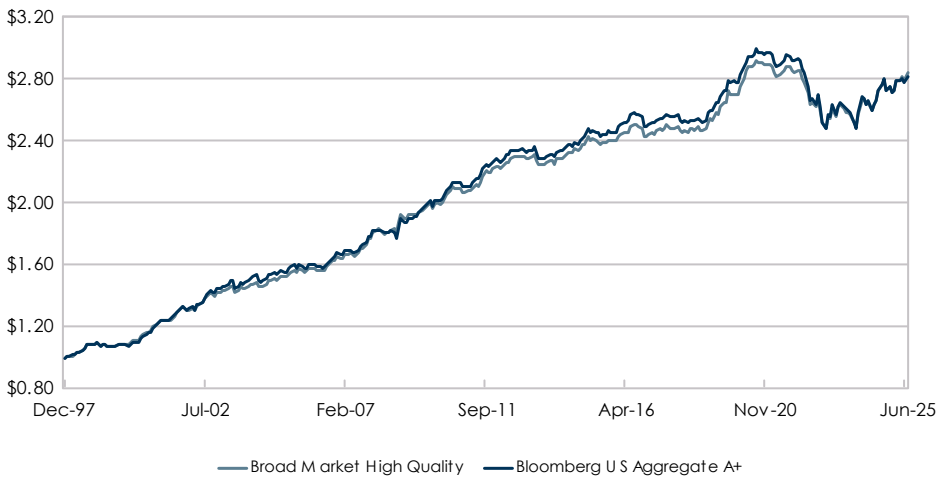
Portfolio Description	Portfolio Information
▪ Strategy Expanded High Quality Fixed Income ▪ Manager Atlanta Capital Management Company ▪ Vehicle Separately Managed Account ▪ Benchmark Barclays Aggregate A+ ▪ Performance Inception Date January 1998 ▪ Fees Manager Fees - 15 bps; Admin Fees - 14.5 bps ▪ Total Expenses Approximately 32 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in Government and high quality securities while maintaining an average maturity of approximately eight and one-half years. ▪ Outperform the Bloomberg US Aggregate A+ over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ The Portfolio is subject to interest rate, credit and liquidity risk, which may cause a loss of principal. Neither the Fund nor its yield is guaranteed by the US Government.			
		FYTD	1 Year
	Beginning Market Value	168,451	160,628
	Net Additions	8,692	8,344
	Return on Investment	2,671	10,842
	Income	4,930	6,493
	Gain/Loss	-2,259	4,349
	Ending Market Value	179,814	179,814

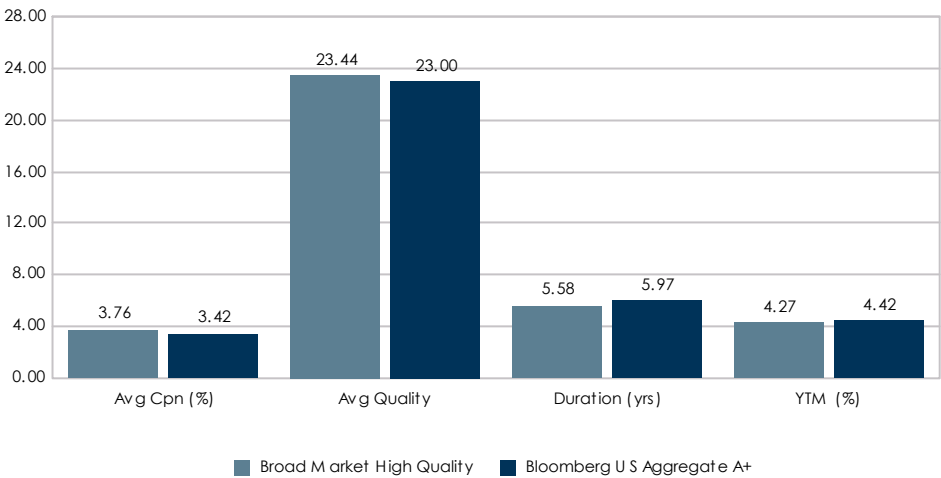
FMIvT Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

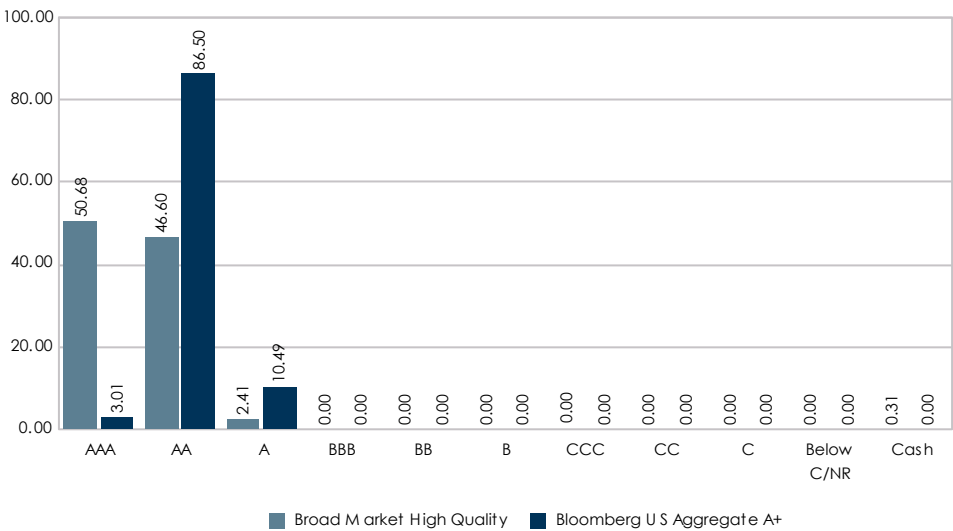
Growth of a Dollar



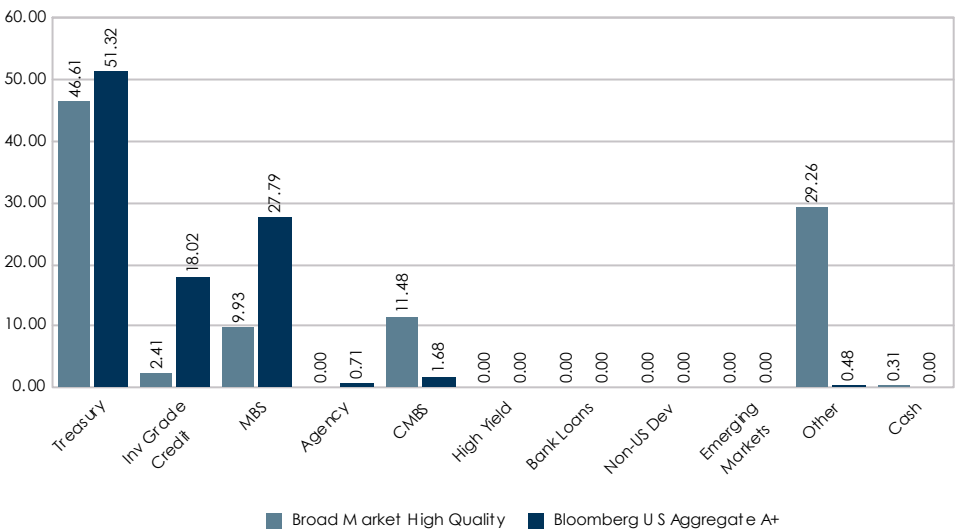
Characteristics



Quality Allocation



Sector Allocation

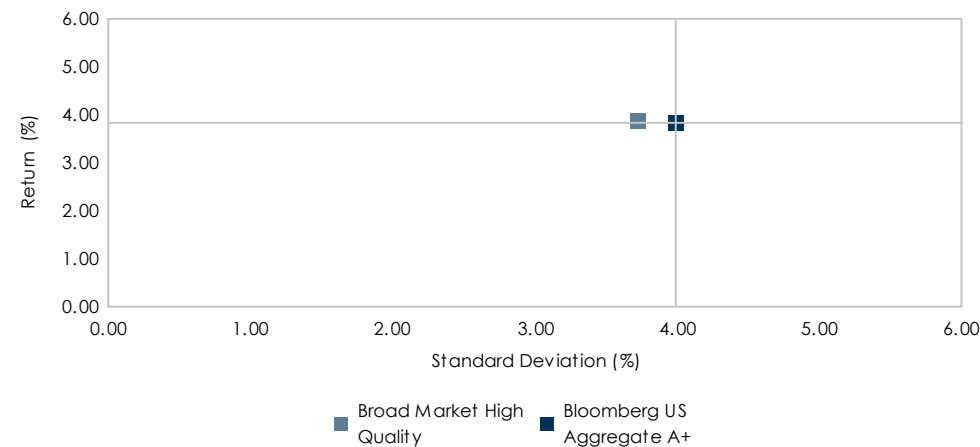


The Other sector consists of ABS, CMO, Convertibles, Municipals, Private Placements/144

FMIvT Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

Risk / Return Since Jan 1998



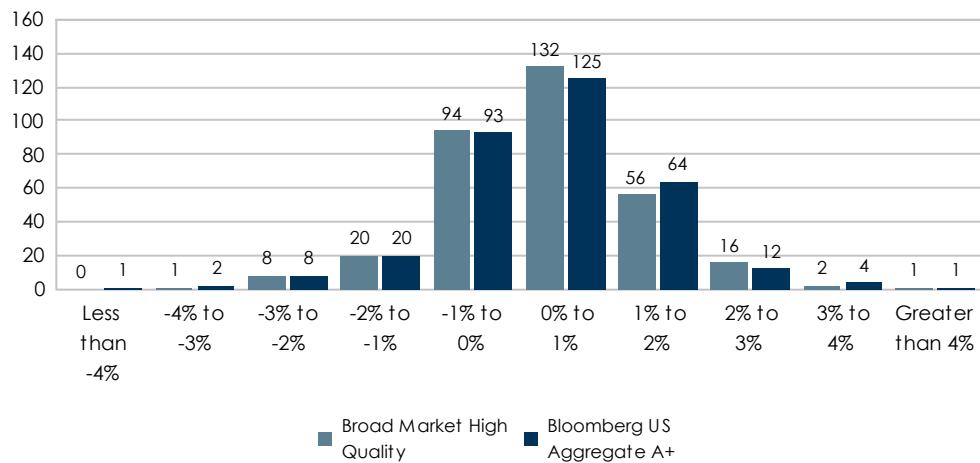
Portfolio Statistics Since Jan 1998

	Broad Market High Quality	Bloomberg US Aggregate A+
Return (%)	3.86	3.84
Standard Deviation (%)	3.72	3.99
Sharpe Ratio	0.49	0.46

Benchmark Relative Statistics

Beta	0.91
R Squared (%)	95.31
Alpha (%)	0.36
Tracking Error (%)	0.88
Batting Average (%)	49.70
Up Capture (%)	94.35
Down Capture (%)	88.78

Return Histogram Since Jan 1998

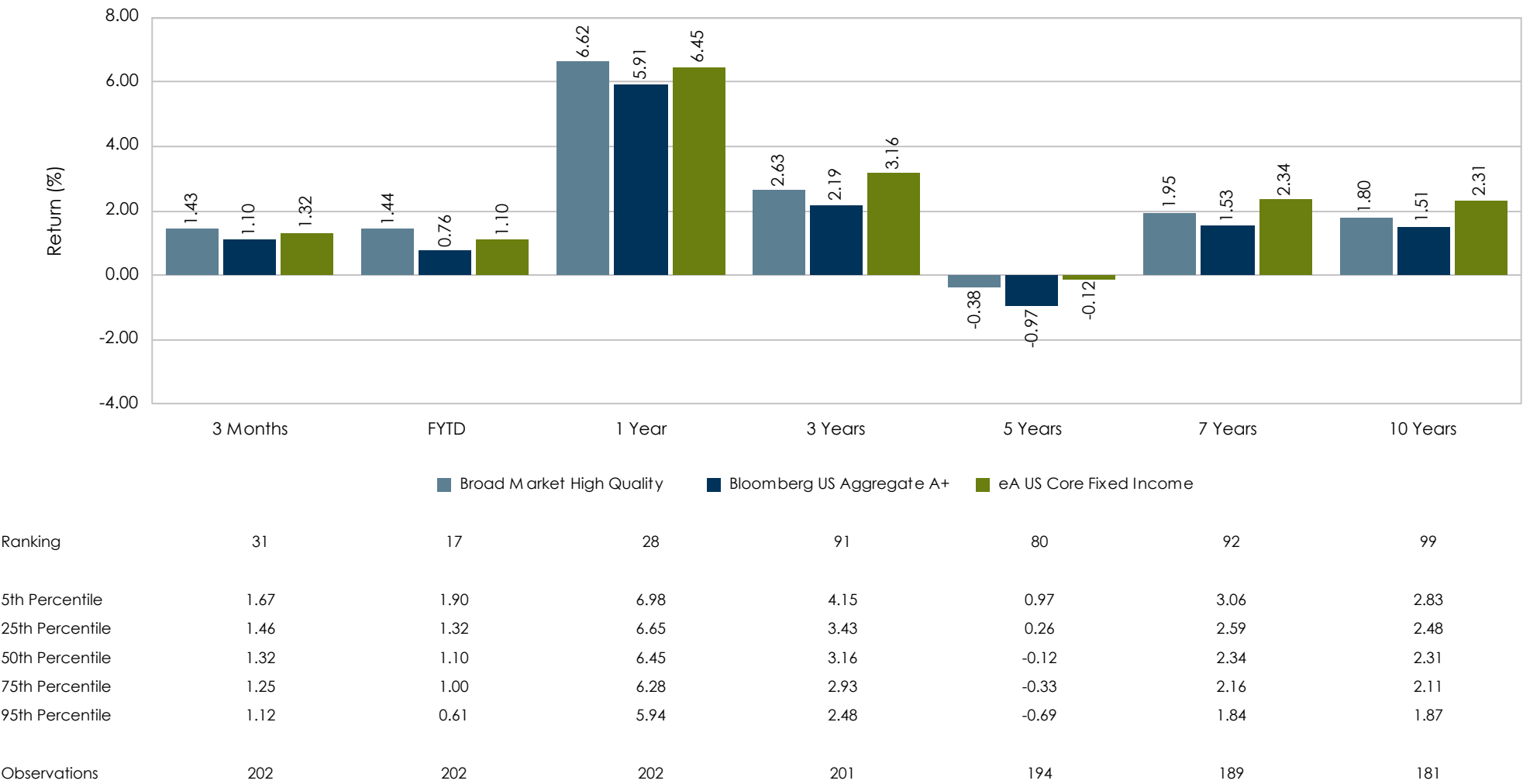


Return Analysis Since Jan 1998

	Broad Market High Quality	Bloomberg US Aggregate A+
Number of Months	330	330
Highest Monthly Return (%)	4.01	4.30
Lowest Monthly Return (%)	-3.40	-4.18
Number of Positive Months	207	206
Number of Negative Months	123	124
% of Positive Months	62.73	62.42

FMIvT Broad Market High Quality Bond Fund

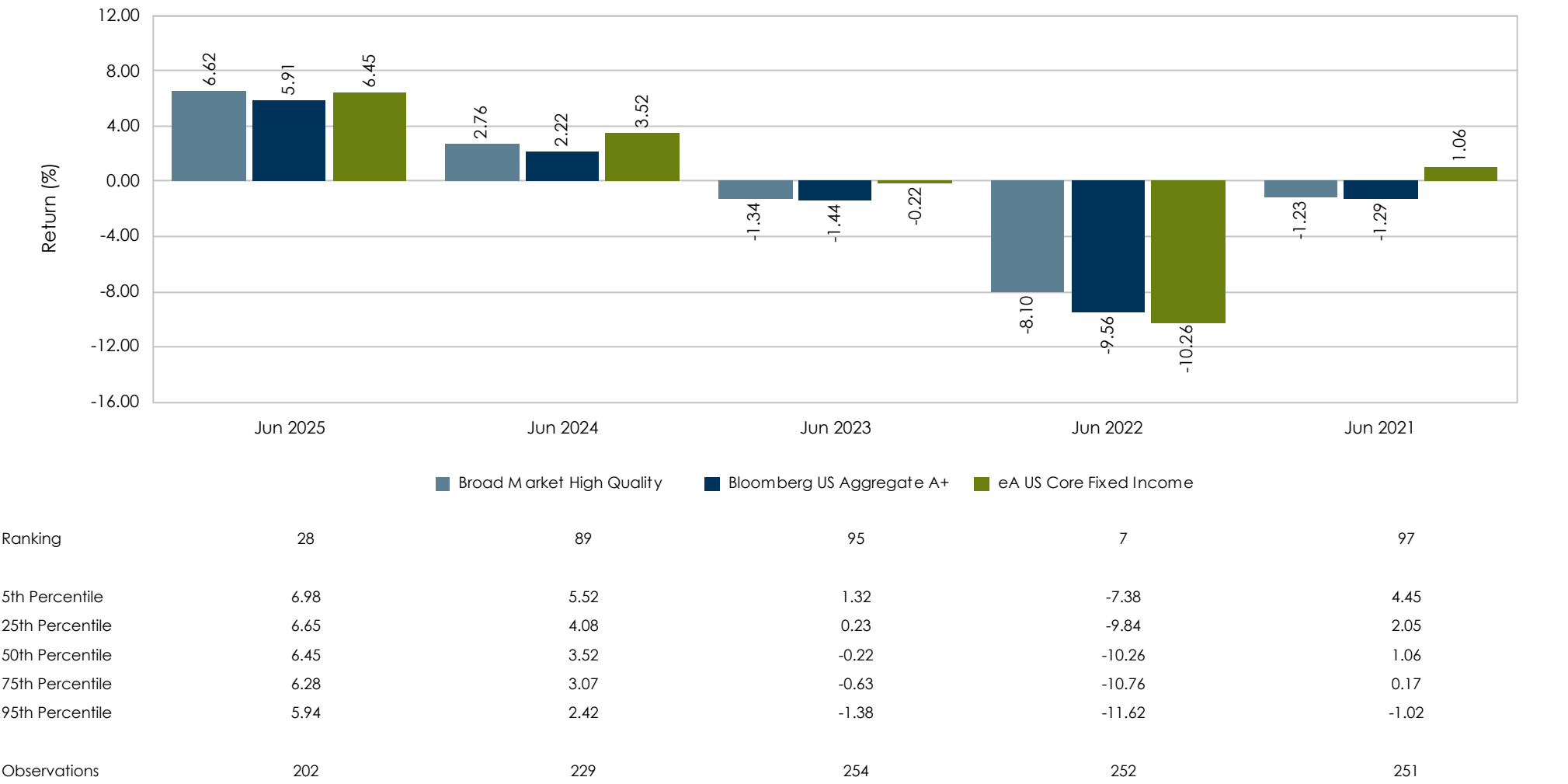
For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Broad Market High Quality Bond Fund

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

Portfolio Sector Allocations	Max. %	Min. %	Actual Portfolio	Within Guidelines?	Comments
U.S. Govt Oblig., U.S. Govt Agency Oblig, or U.S. Govt Instrum. Oblig.	75.00%	30.00%	46.61%	Yes	
Mortgage Securities including CMO's	50.00%	0.00%	21.95%	Yes	
Corporate and Yankee Debt Obligations	30.00%	0.00%	2.41%	Yes	
Asset Backed Securities	30.00%	0.00%	28.72%	Yes	
Reverse Repurchase Agreements and/or other forms of financial leverage *	30.00%	0.00%	0.00%	Yes	
Other (Cash)	25.00%	0.00%	0.31%	Yes	
Portfolio Duration/Quality	Policy Expectations		Actual Portfolio	Within Guidelines?	Comments
Modified Duration					
Portfolio should maintain a duration equal to the Bloomberg US Aggregate A+ Index plus or minus 30% but no greater than 7 years.	4.18 to 7.00		5.58	Yes	
Credit quality					
Portfolio should Maintain a minimum bond fund rating of AA (Fitch).	AAf			Yes	
Individual Securities				Within Guidelines?	Comments
Minimum credit rating of A by any NRSRO for all corporate securities.				Yes	
Maximum of 3% at time of purchase and 5% of the portfolio value may be invested in corporate securities of an individual issuer.			2.67%	Yes	Largest Position Noted
A maximum of 5% of the portfolio, at market, may be invested in individual trusts of ABS and Non-Agency CMOs.			2.62%	Yes	Largest Position Noted
Final stated maturity of 31.0 years or less for all securities.				Yes	

*Asset Consulting Group is unable to verify the actual percentages in the portfolio. However, ACG has confirmed the actual portfolio allocation is less than the maximum percentage allowed.

FMIvT Core Plus Fixed Income Fund

For the Periods Ending June 30, 2025

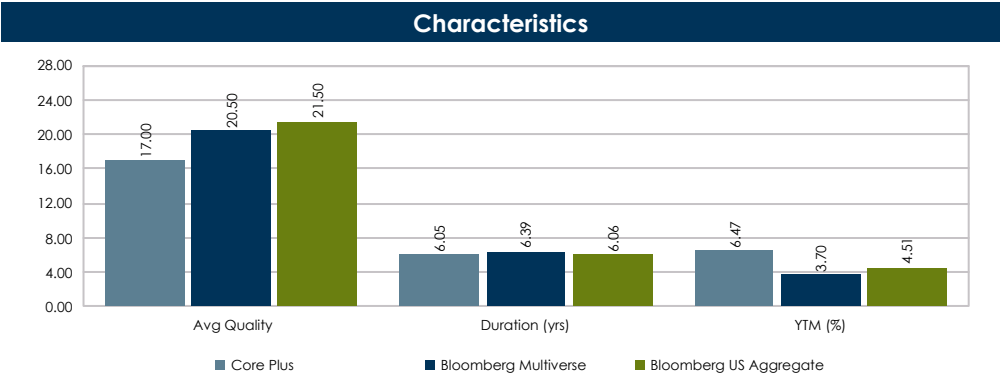
Portfolio Description	Portfolio Information
▪ Strategy Core Plus Fixed Income ▪ Manager Pioneer Institutional Investment ▪ Vehicle Non-Mutual Commingled ▪ Benchmark Barclays Multiverse ▪ Performance Inception Date April 2014 ▪ Fees Manager Fee - 55 bps; Admin Fee - 14.5 bps ▪ Total Expenses Approximately 72 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following a Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in a broad spectrum of fixed and floating rate debt securities that are diversified by credit quality, geography and duration. ▪ Outperform the Bloomberg Multiverse over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ The Portfolio is subject to interest rate, credit and liquidity risk, which may cause a loss of principal. Neither the Fund nor its yield is guaranteed by the US Government.			
		FYTD	1 Year
	Beginning Market Value	167,280	155,381
	Net Additions	7,207	9,186
	Return on Investment	6,244	16,163
	Ending Market Value	180,731	180,731

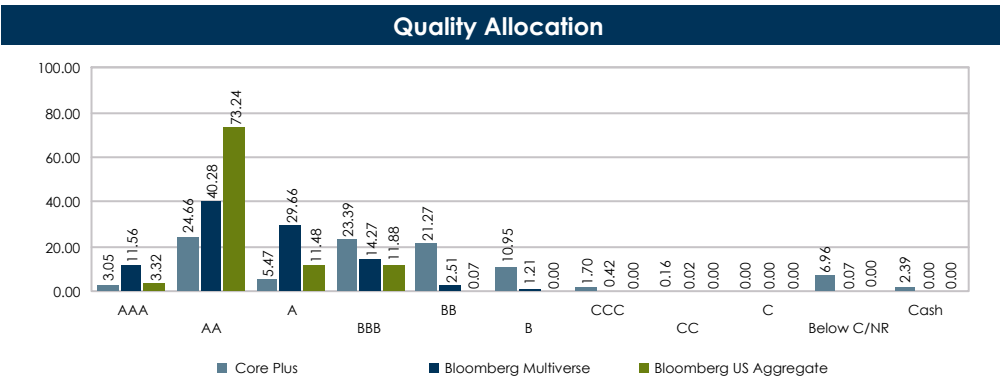
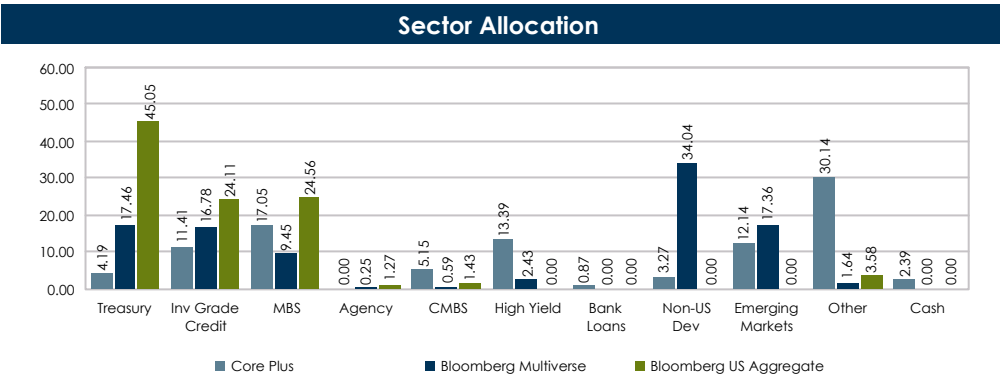
FMIvT Core Plus Fixed Income Fund

For the Periods Ending June 30, 2025

Manager Allocation		
Name	Market Value (\$000s)	Allocation (%)
Total Core Plus	180,731	100.00
Pioneer MSFI	180,731	100.00



Dollar Growth Summary (\$000s)		
	FYTD	1 Year
Beginning Market Value	167,280	155,381
Net Additions	7,207	9,186
Return on Investment	6,244	16,163
Ending Market Value	180,731	180,731

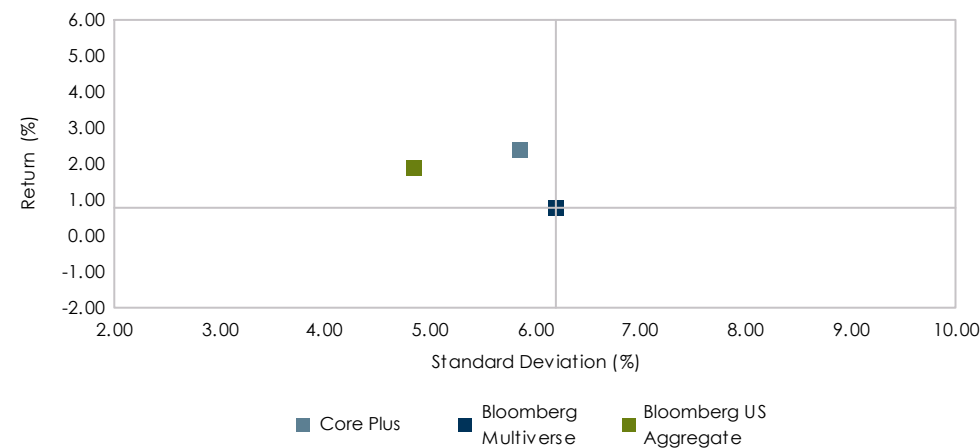


The Other sector consists of ABS, CMO, Convertibles, Municipals, Private Placements/144As and TIPS.

FMIvT Core Plus Fixed Income Fund

For the Periods Ending June 30, 2025

Risk / Return Since Apr 2014



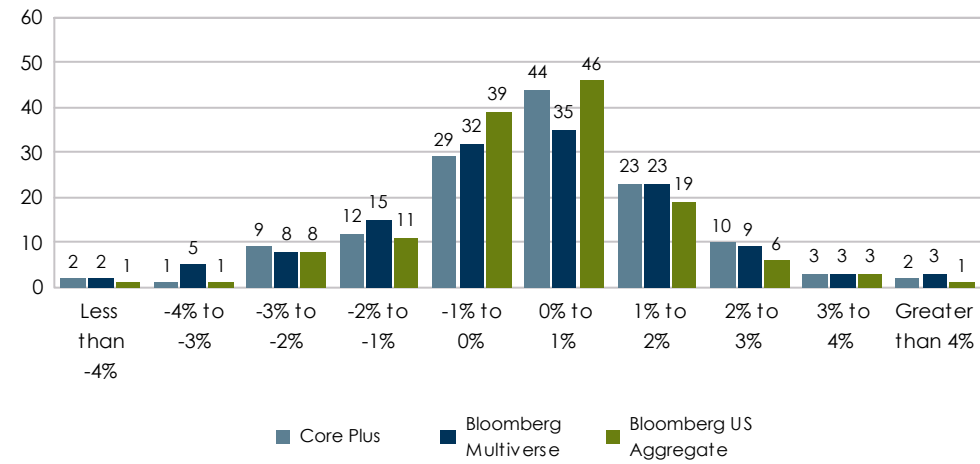
Portfolio Statistics Since Apr 2014

	Core Plus	Bloomberg Multiverse	Bloomberg US Aggregate
Return (%)	2.38	0.77	1.91
Standard Deviation (%)	5.85	6.19	4.85
Sharpe Ratio	0.11	-0.16	0.04

Benchmark Relative Statistics

Beta	0.66	0.78
R Squared (%)	49.07	42.13
Alpha (%)	1.91	0.95
Tracking Error (%)	4.67	4.57
Batting Average (%)	57.78	59.26
Up Capture (%)	68.16	79.96
Down Capture (%)	48.43	66.65

Return Histogram Since Apr 2014

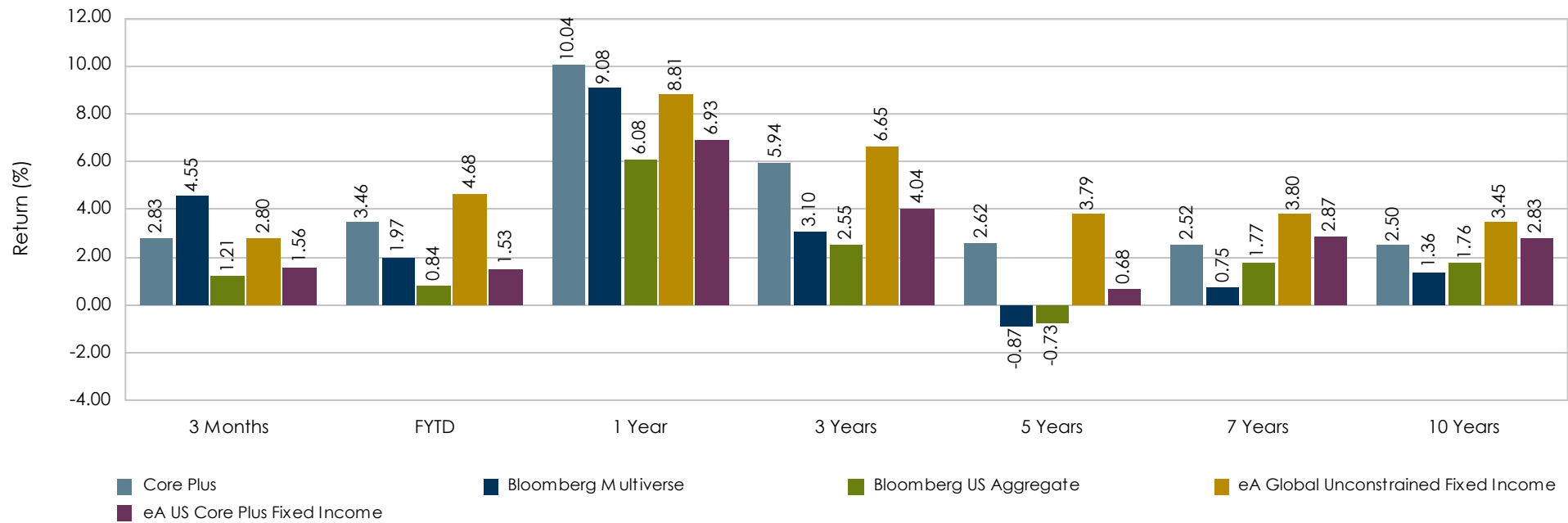


Return Analysis Since Apr 2014

	Core Plus	Bloomberg Multiverse	Bloomberg US Aggregate
Number of Months	135	135	135
Highest Monthly Return (%)	4.84	5.06	4.53
Lowest Monthly Return (%)	-8.40	-5.44	-4.32
Number of Positive Months	82	73	75
Number of Negative Months	53	62	60
% of Positive Months	60.74	54.07	55.56

FMIvT Core Plus Fixed Income Fund

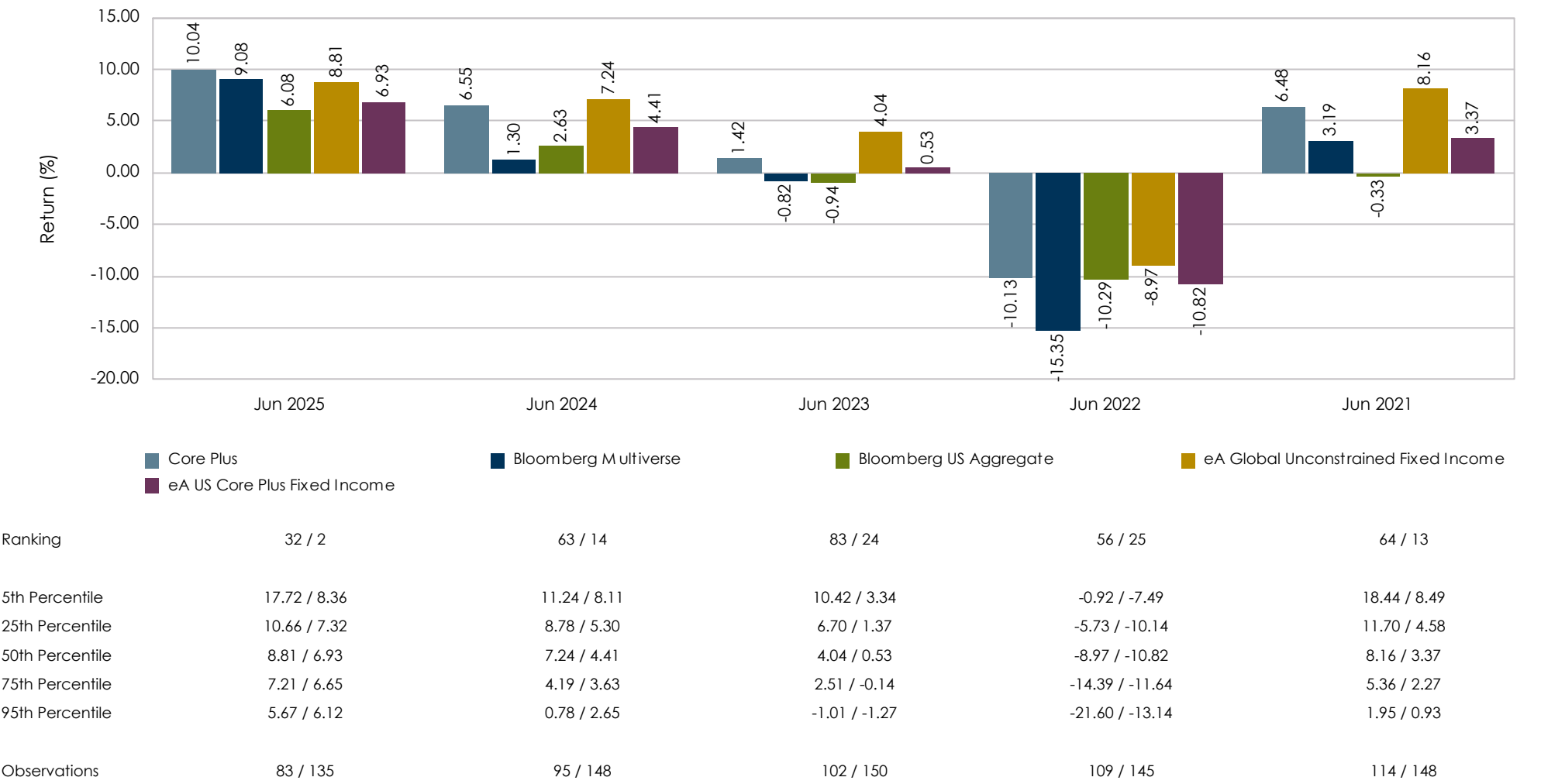
For the Periods Ending June 30, 2025



Ranking	50 / 2	74 / 2	32 / 2	71 / 6	78 / 8	84 / 78	77 / 81
5th Percentile	10.05 / 2.32	8.59 / 2.96	17.72 / 8.36	10.84 / 5.95	6.68 / 3.07	6.04 / 4.16	5.11 / 4.05
25th Percentile	6.53 / 1.76	5.70 / 1.89	10.66 / 7.32	8.72 / 4.55	4.83 / 1.47	4.50 / 3.33	4.19 / 3.27
50th Percentile	2.80 / 1.56	4.68 / 1.53	8.81 / 6.93	6.65 / 4.04	3.79 / 0.68	3.80 / 2.87	3.45 / 2.83
75th Percentile	2.16 / 1.42	3.40 / 1.25	7.21 / 6.65	5.75 / 3.58	2.71 / 0.35	3.07 / 2.57	2.69 / 2.55
95th Percentile	1.59 / 1.22	-0.27 / 0.79	5.67 / 6.12	3.75 / 2.84	0.92 / -0.27	1.58 / 2.27	1.38 / 2.22
Observations	83 / 135	83 / 135	83 / 135	83 / 135	79 / 130	75 / 121	64 / 112

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Core Plus Fixed Income Fund
For the One Year Periods Ending June

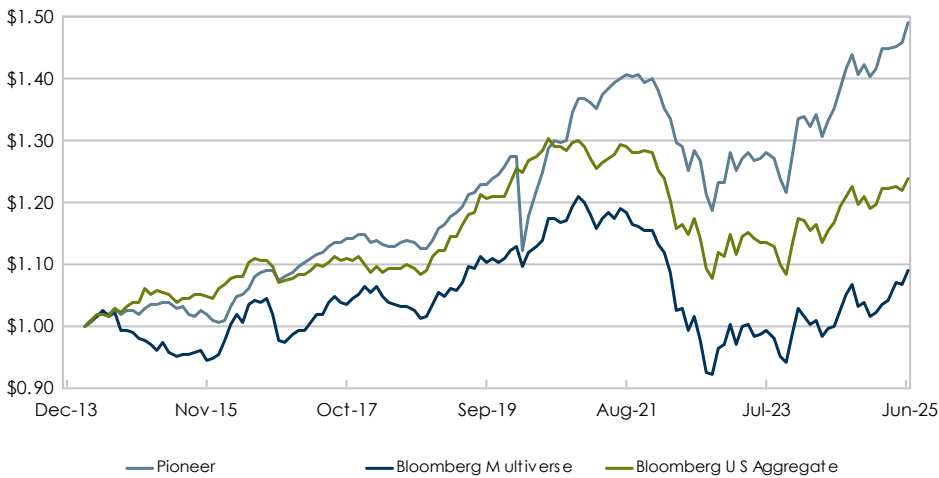


The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

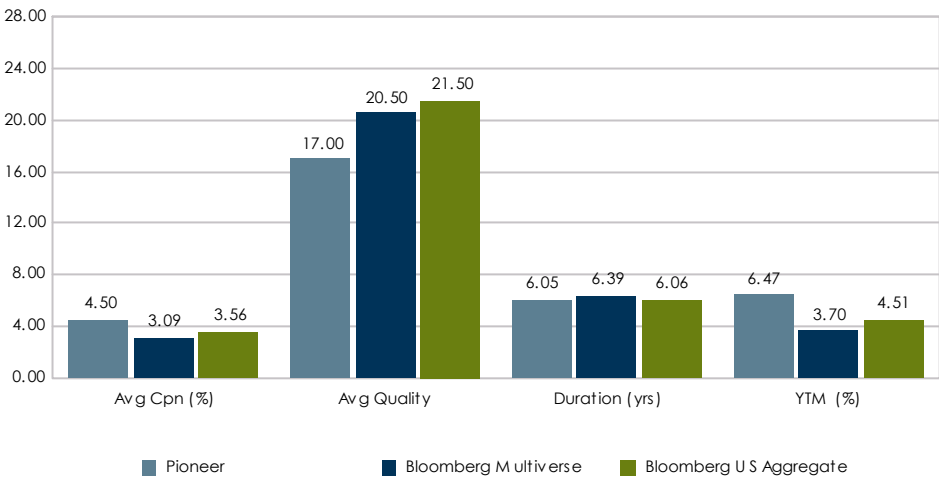
Pioneer MSFI

For the Periods Ending June 30, 2025

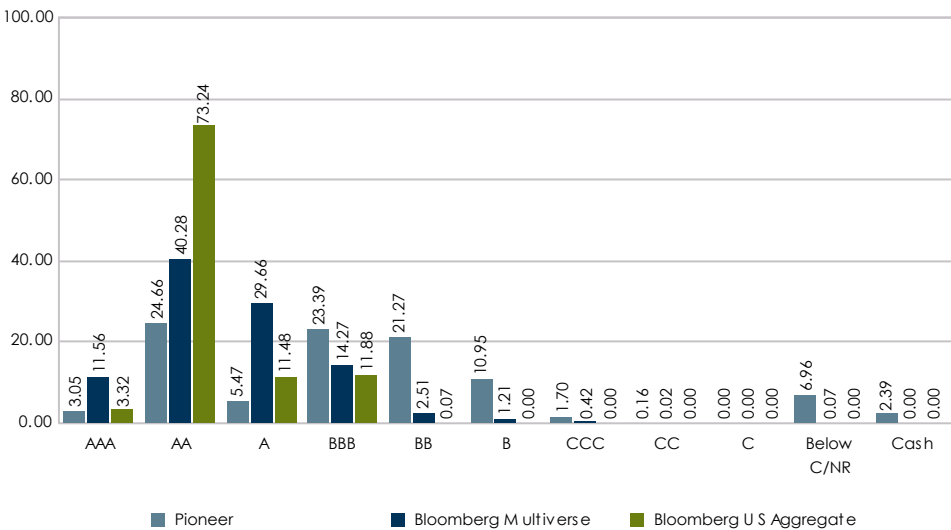
Growth of a Dollar



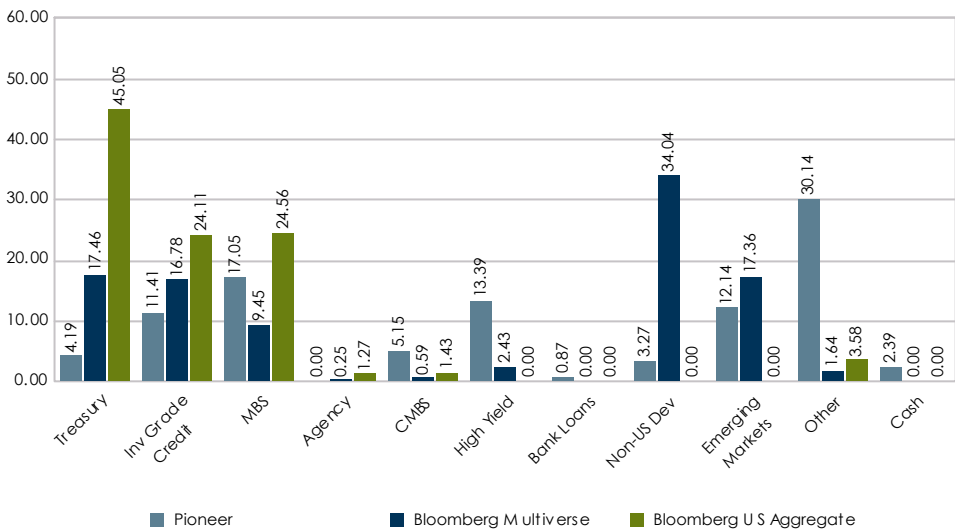
Characteristics



Quality Allocation



Sector Allocation



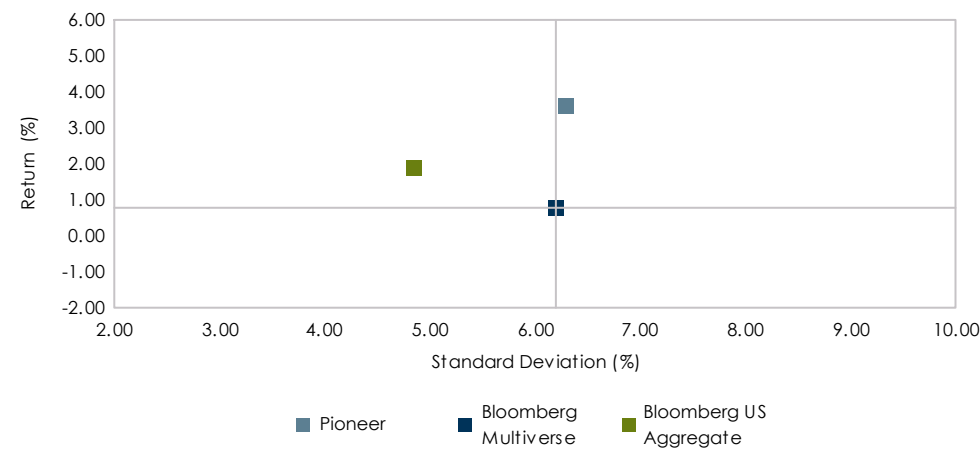
Characteristic and allocation charts represents the composite data of the Pioneer Multi-Sector Fixed Income.

The Other sector consists of ABS, CMO, Convertibles, Municipals, Private Placements/144

Pioneer MSFI

For the Periods Ending June 30, 2025

Risk / Return Since Apr 2014



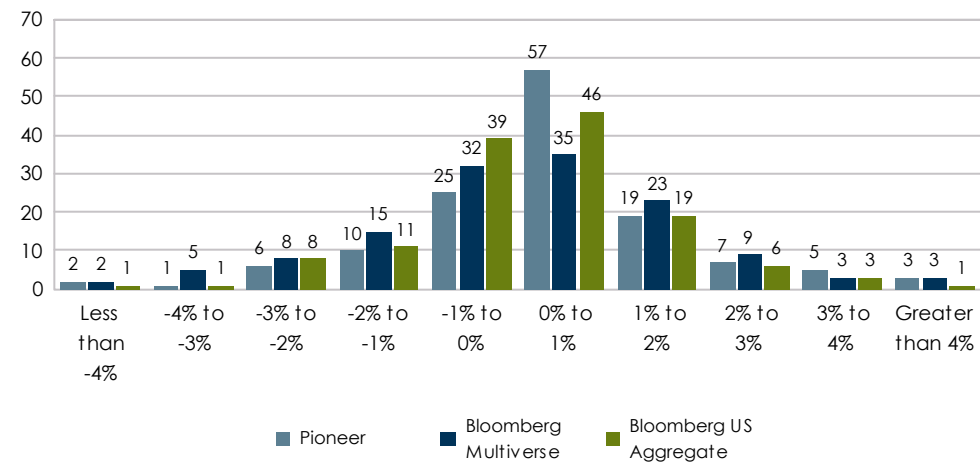
Portfolio Statistics Since Apr 2014

	Pioneer	Bloomberg Multiverse	Bloomberg US Aggregate
Return (%)	3.60	0.77	1.91
Standard Deviation (%)	6.30	6.19	4.85
Sharpe Ratio	0.30	-0.16	0.04

Benchmark Relative Statistics

Beta	0.77	0.93
R Squared (%)	57.58	50.99
Alpha (%)	3.05	1.90
Tracking Error (%)	4.34	4.42
Batting Average (%)	65.19	62.96
Up Capture (%)	89.99	111.10
Down Capture (%)	55.93	83.44

Return Histogram Since Apr 2014

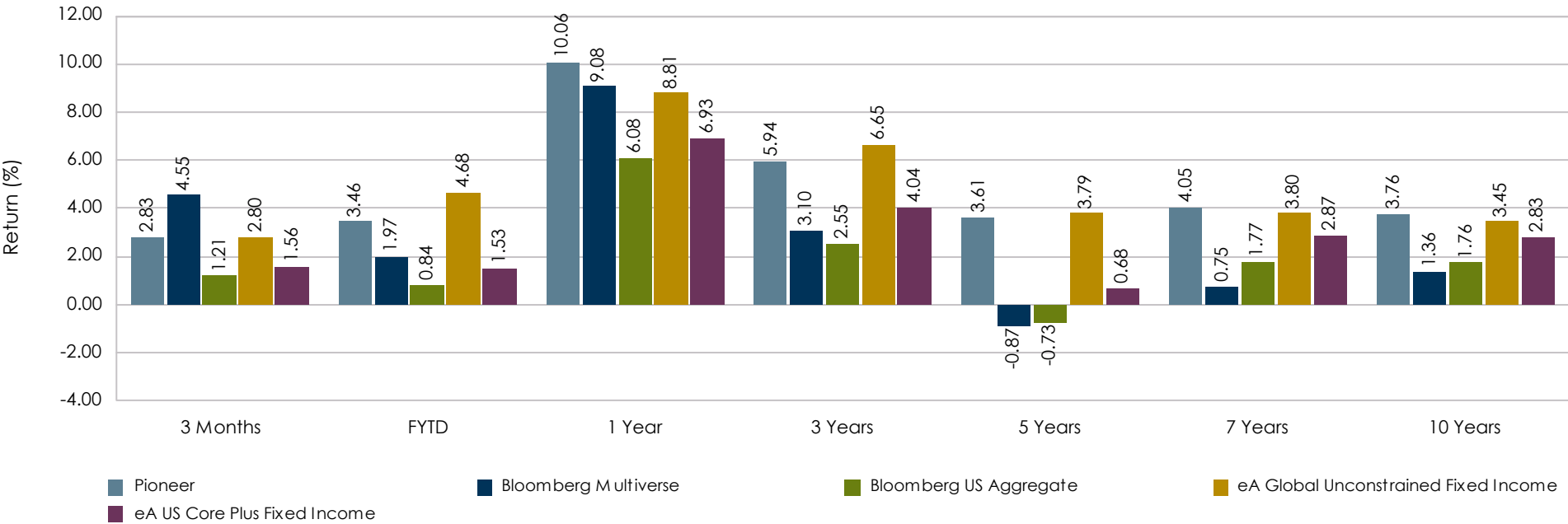


Return Analysis Since Apr 2014

	Pioneer	Bloomberg Multiverse	Bloomberg US Aggregate
Number of Months	135	135	135
Highest Monthly Return (%)	4.84	5.06	4.53
Lowest Monthly Return (%)	-11.69	-5.44	-4.32
Number of Positive Months	91	73	75
Number of Negative Months	44	62	60
% of Positive Months	67.41	54.07	55.56

Pioneer MSFI

For the Periods Ending June 30, 2025

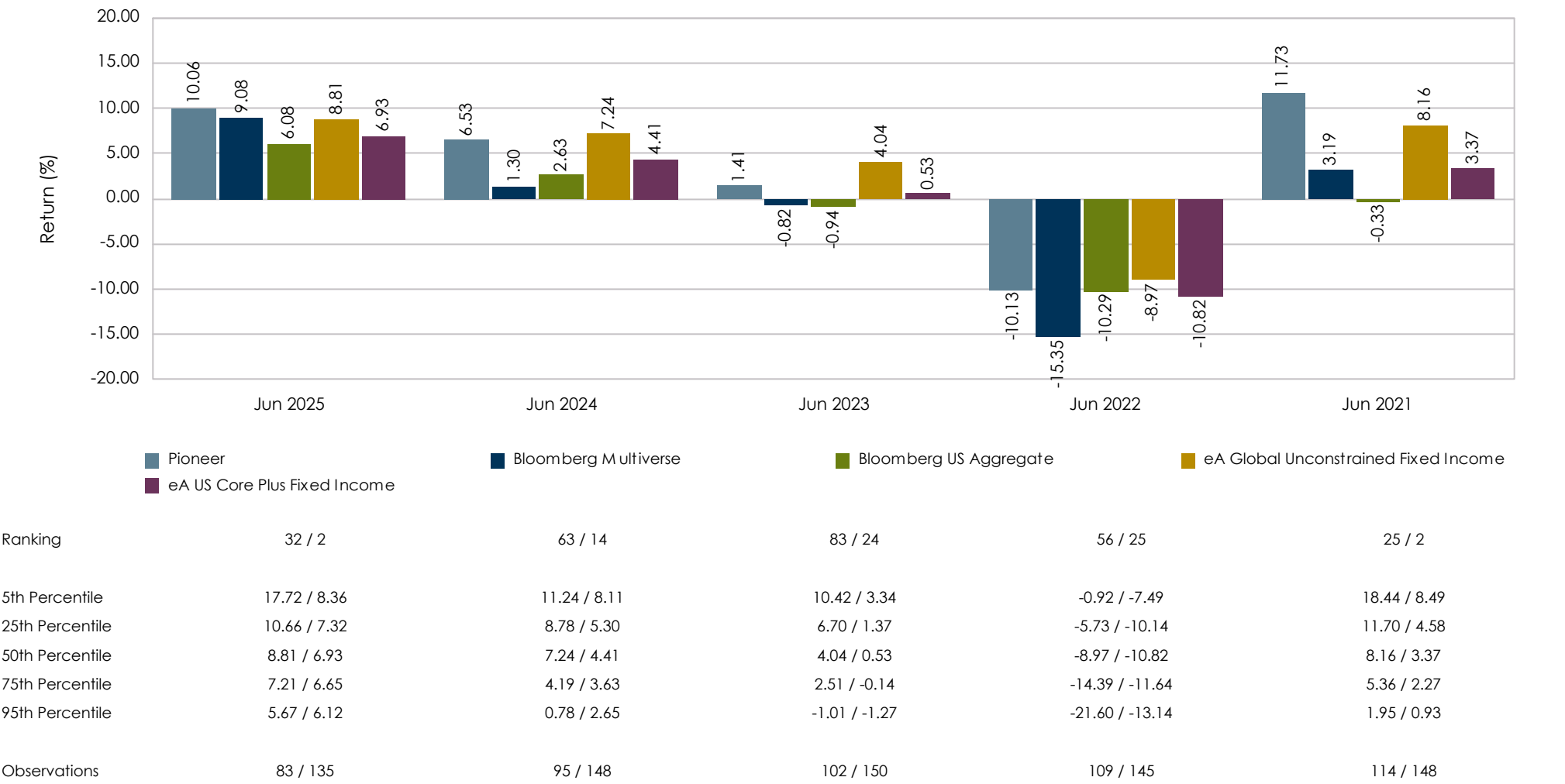


Ranking	50 / 2	74 / 2	32 / 2	71 / 6	59 / 4	37 / 7	39 / 13
5th Percentile	10.05 / 2.32	8.59 / 2.96	17.72 / 8.36	10.84 / 5.95	6.68 / 3.07	6.04 / 4.16	5.11 / 4.05
25th Percentile	6.53 / 1.76	5.70 / 1.89	10.66 / 7.32	8.72 / 4.55	4.83 / 1.47	4.50 / 3.33	4.19 / 3.27
50th Percentile	2.80 / 1.56	4.68 / 1.53	8.81 / 6.93	6.65 / 4.04	3.79 / 0.68	3.80 / 2.87	3.45 / 2.83
75th Percentile	2.16 / 1.42	3.40 / 1.25	7.21 / 6.65	5.75 / 3.58	2.71 / 0.35	3.07 / 2.57	2.69 / 2.55
95th Percentile	1.59 / 1.22	-0.27 / 0.79	5.67 / 6.12	3.75 / 2.84	0.92 / -0.27	1.58 / 2.27	1.38 / 2.22
Observations	83 / 135	83 / 135	83 / 135	83 / 135	79 / 130	75 / 121	64 / 112

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Pioneer MSFI

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Diversified Large Cap Equity Portfolio

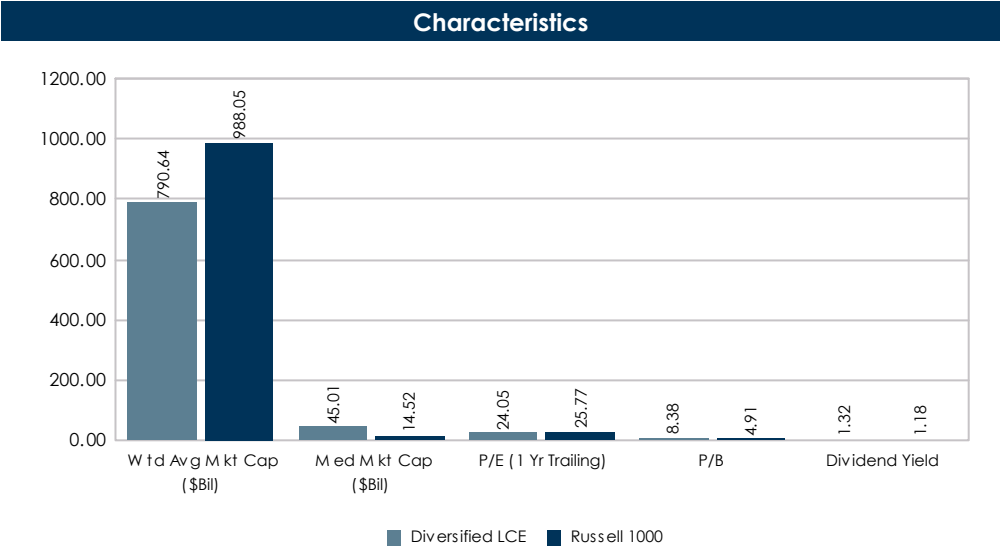
For the Periods Ending June 30, 2025

Portfolio Description	Portfolio Information		
■ Strategy Large Cap US Equity ■ Manager StateStreet, Hotchkis & Wiley, & Atlanta Capital ■ Vehicle Non-Mutual Commingled ■ Benchmark Russell 1000 ■ Performance Inception Date October 2017 ■ Fees Manager Fee - 27 bps; Admin Fee - 14.5 bps ■ Total Expenses Approximately 43 bps	■ Minimum initial investment \$50,000 ■ Minimum subsequent investments \$5,000 ■ Minimum redemption \$5,000 ■ The Portfolio is open once a month, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ■ The Portfolio is valued on the last business day of the month. ■ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.		
Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
■ Invests in large cap US stocks that are diversified by industry and sector. ■ Outperform the Russell 1000 over a complete market cycle (usually 3 to 5 years). ■ Rank above median in a relevant peer group universe. ■ Stock values fluctuate in response to the activities of individual companies, the general market and economic conditions. Shares of the Portfolio are neither insured nor guaranteed by any US Government agency, including the FDIC.			
		FYTD	1 Year
	Beginning Market Value	300,035	292,116
	Net Additions	5,502	-4,067
	Return on Investment	20,603	38,091
	Ending Market Value	326,140	326,140

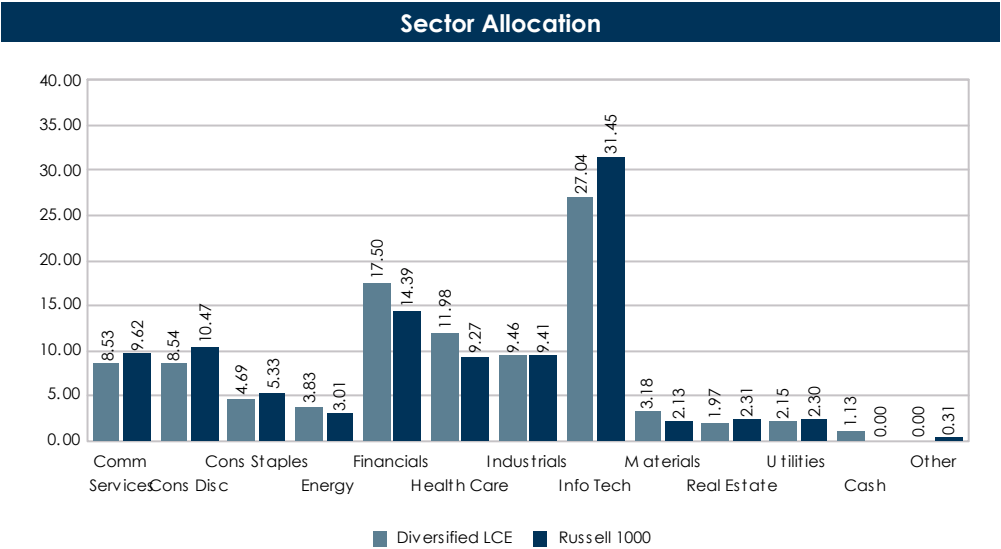
FMIvT Diversified Large Cap Equity Portfolio

For the Periods Ending June 30, 2025

Manager Allocation		
Name	Market Value (\$000s)	Allocation (%)
Total Diversified LCE	326,140	100.00
SSgA S&P 500 Index	194,642	59.68
Atlanta Capital High Quality Growth	66,129	20.28
Hotchkis & Wiley Diversified Value	65,370	20.04



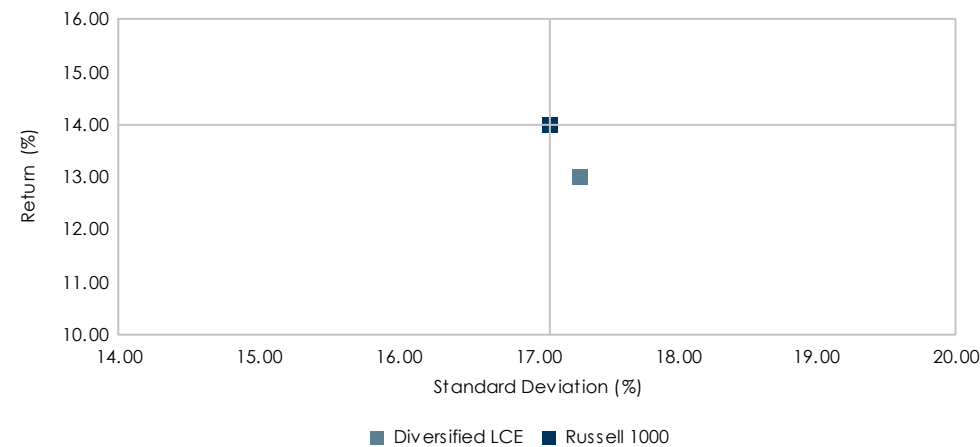
Dollar Growth Summary (\$000s)		
	FYTD	1 Year
Beginning Market Value	300,035	292,116
Net Additions	5,502	-4,067
Return on Investment	20,603	38,091
Ending Market Value	326,140	326,140



FMIvT Diversified Large Cap Equity Portfolio

For the Periods Ending June 30, 2025

Risk / Return Since Oct 2017



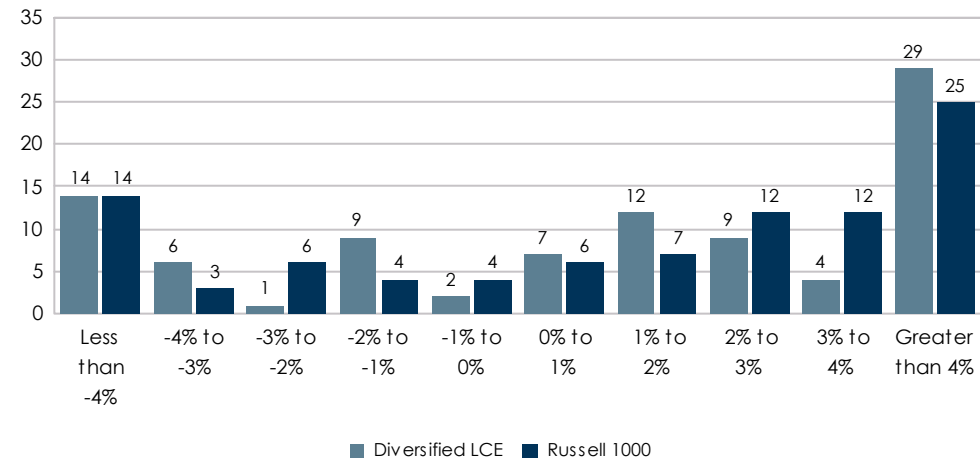
Portfolio Statistics Since Oct 2017

	Diversified LCE	Russell 1000
Return (%)	13.00	13.99
Standard Deviation (%)	17.30	17.09
Sharpe Ratio	0.61	0.68

Benchmark Relative Statistics

Beta	1.00
R Squared (%)	97.60
Alpha (%)	-0.85
Tracking Error (%)	2.68
Batting Average (%)	45.16
Up Capture (%)	95.62
Down Capture (%)	99.05

Return Histogram Since Oct 2017

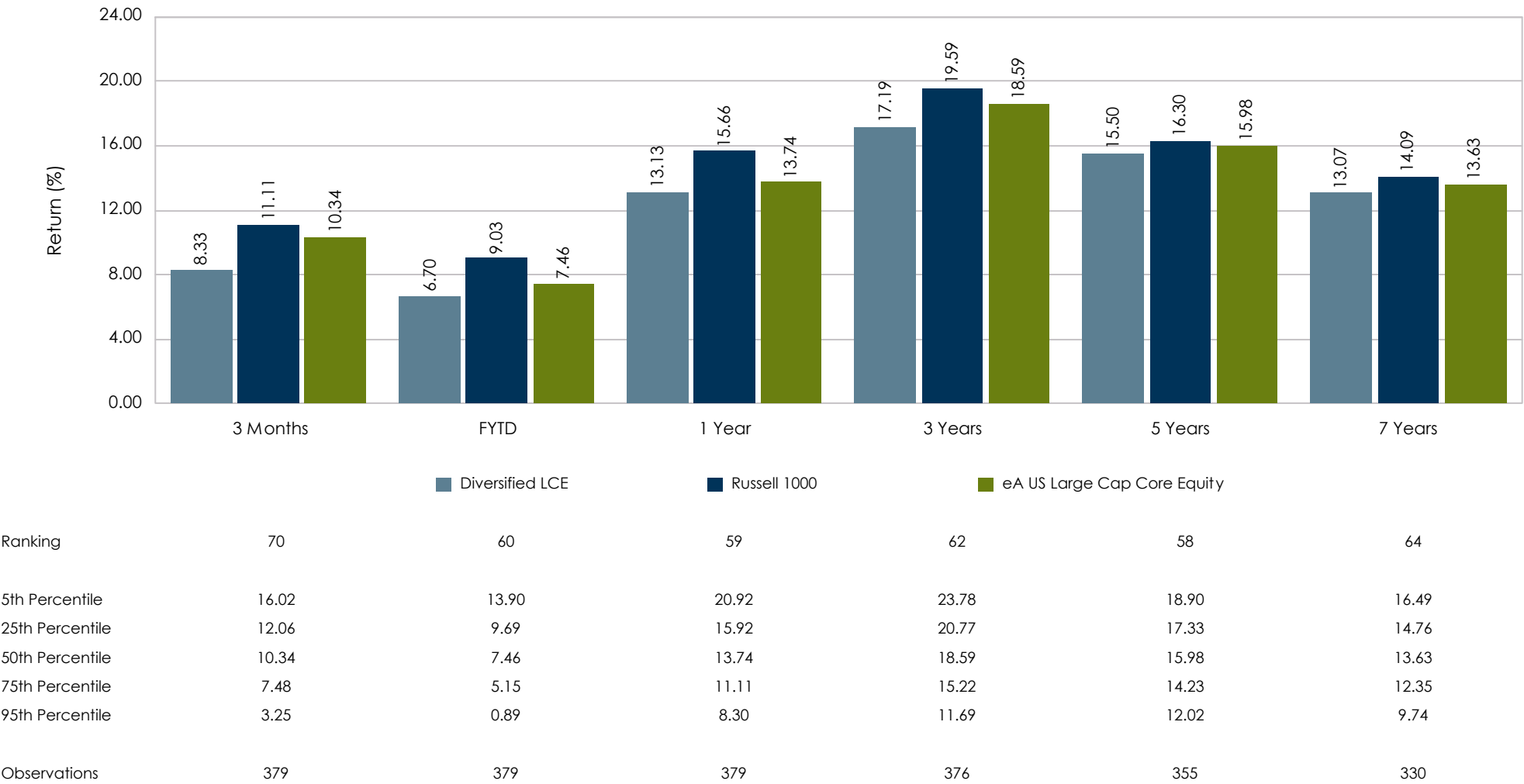


Return Analysis Since Oct 2017

	Diversified LCE	Russell 1000
Number of Months	93	93
Highest Monthly Return (%)	13.79	13.21
Lowest Monthly Return (%)	-14.99	-13.21
Number of Positive Months	61	62
Number of Negative Months	32	31
% of Positive Months	65.59	66.67

FMIvT Diversified Large Cap Equity Portfolio

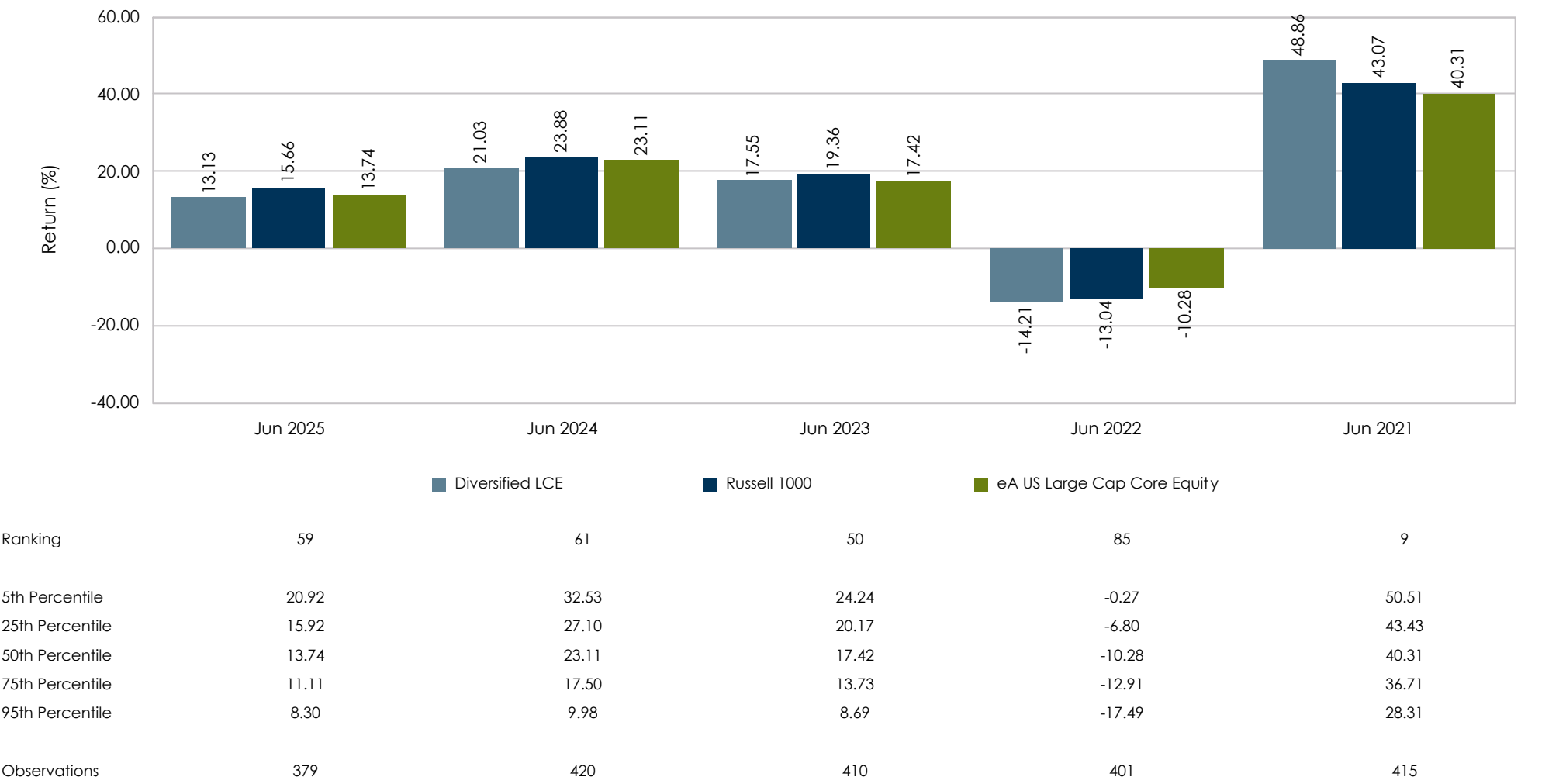
For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Diversified Large Cap Equity Portfolio

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Diversified Large Cap Equity Portfolio

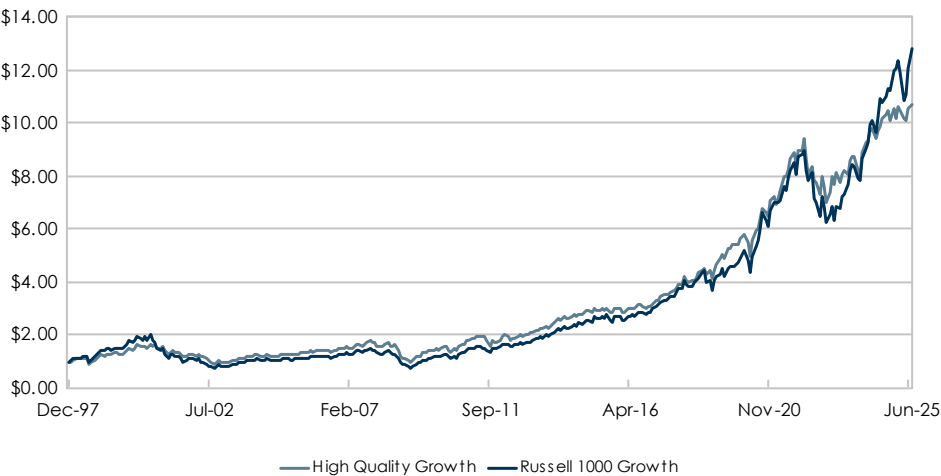
For the Periods Ending June 30, 2025

Manager Allocations	Target %	Range%	Actual Portfolio	Within Guidelines?	Comments
SSgA S&P 500 Index	60.0%	50% - 70%	59.68%	Yes	
Atlanta Capital High Quality Growth	20.0%	10% - 30%	20.28%	Yes	
Hotchkis & Wiley Diversified Value	20.0%	10% - 30%	20.04%	Yes	
Allocation	Max. %		Actual Portfolio	Within Guidelines?	Comments
A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.0%		1.13%	Yes	
The portfolio shall not own private placements, unregistered or registered stock, options, futures, or commodities, nor participate in margin trading.	N/A		N/A	Yes	

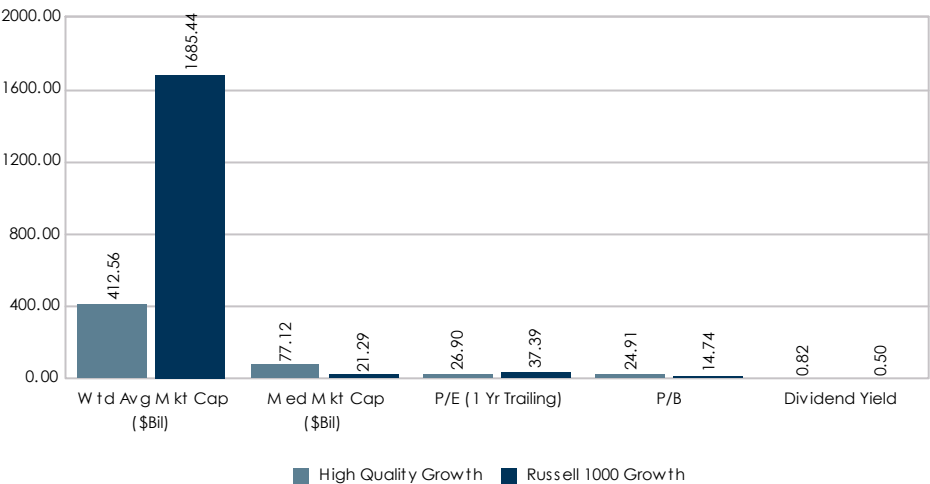
Atlanta Capital High Quality Growth

For the Periods Ending June 30, 2025

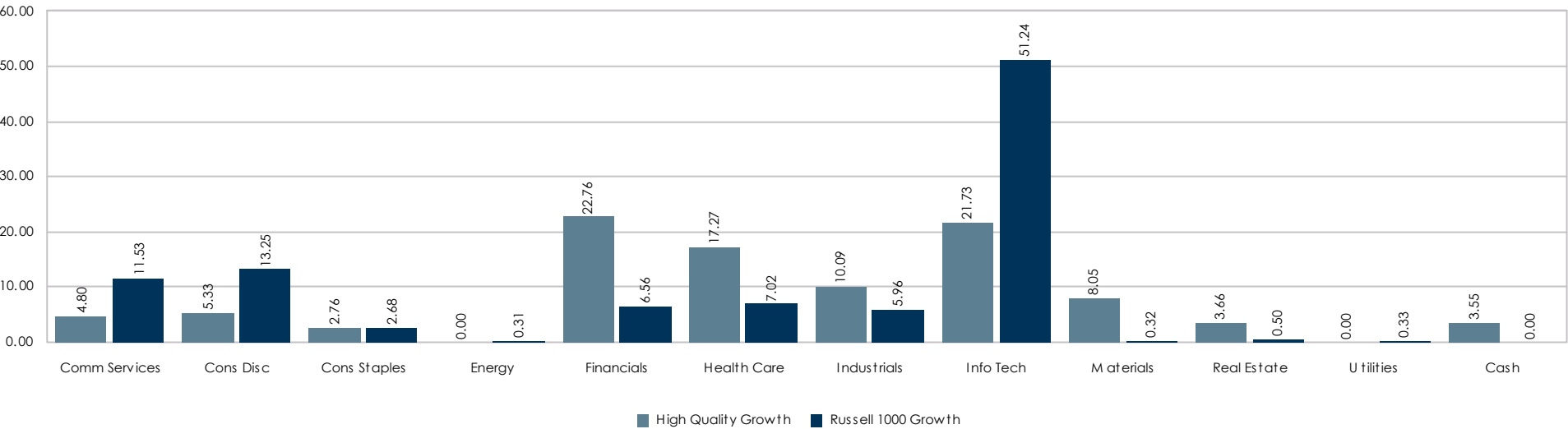
Growth of a Dollar



Characteristics



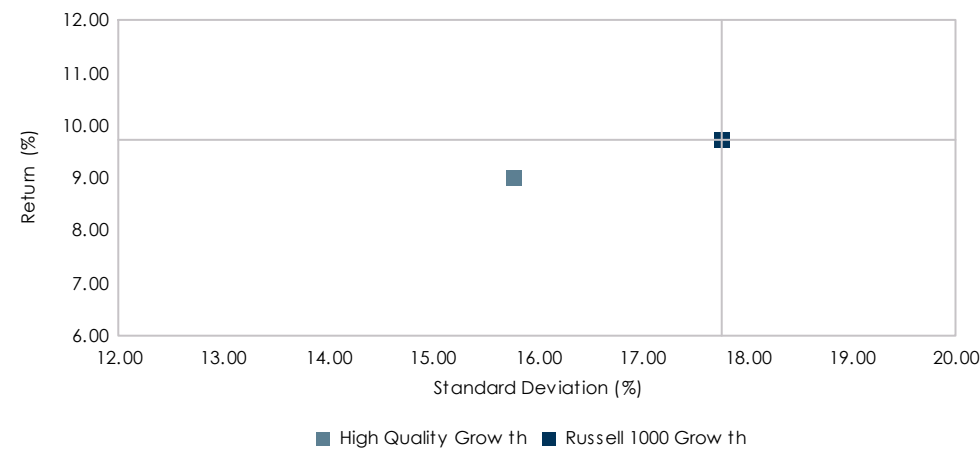
Sector Allocation



Atlanta Capital High Quality Growth

For the Periods Ending June 30, 2025

Risk / Return Since Jan 1998



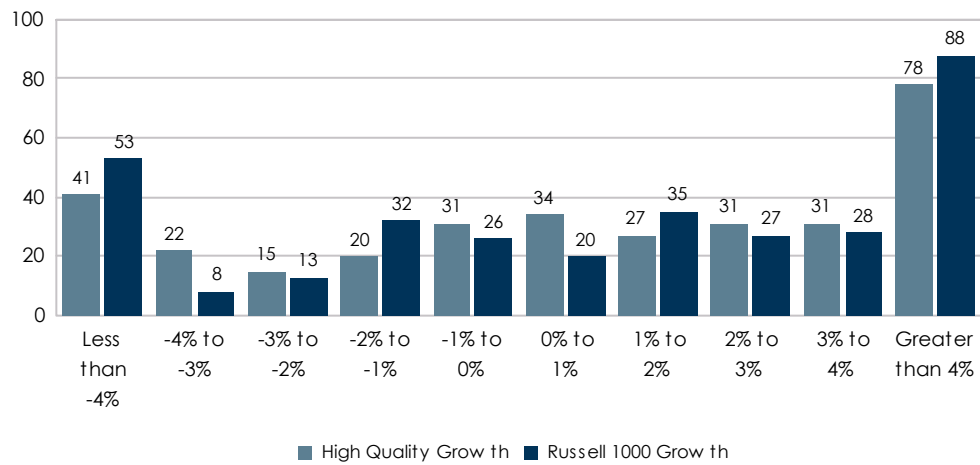
Portfolio Statistics Since Jan 1998

	High Quality Growth	Russell 1000 Growth
Return (%)	9.01	9.72
Standard Deviation (%)	15.78	17.77
Sharpe Ratio	0.44	0.43

Benchmark Relative Statistics

Beta	0.82
R Squared (%)	86.18
Alpha (%)	0.92
Tracking Error (%)	6.64
Batting Average (%)	44.55
Up Capture (%)	82.76
Down Capture (%)	85.87

Return Histogram Since Jan 1998

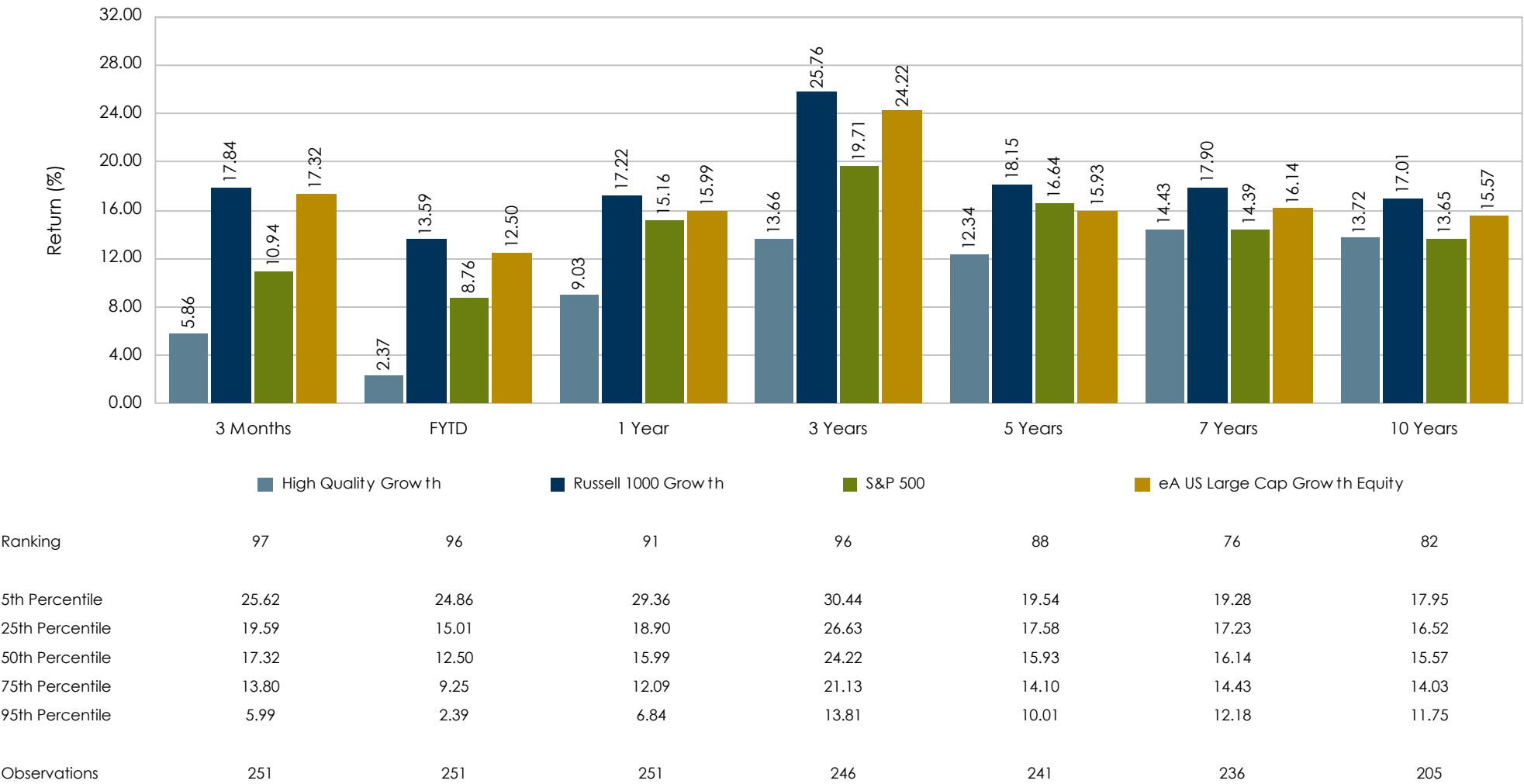


Return Analysis Since Jan 1998

	High Quality Growth	Russell 1000 Growth
Number of Months	330	330
Highest Monthly Return (%)	13.30	14.80
Lowest Monthly Return (%)	-17.56	-17.61
Number of Positive Months	201	198
Number of Negative Months	129	132
% of Positive Months	60.91	60.00

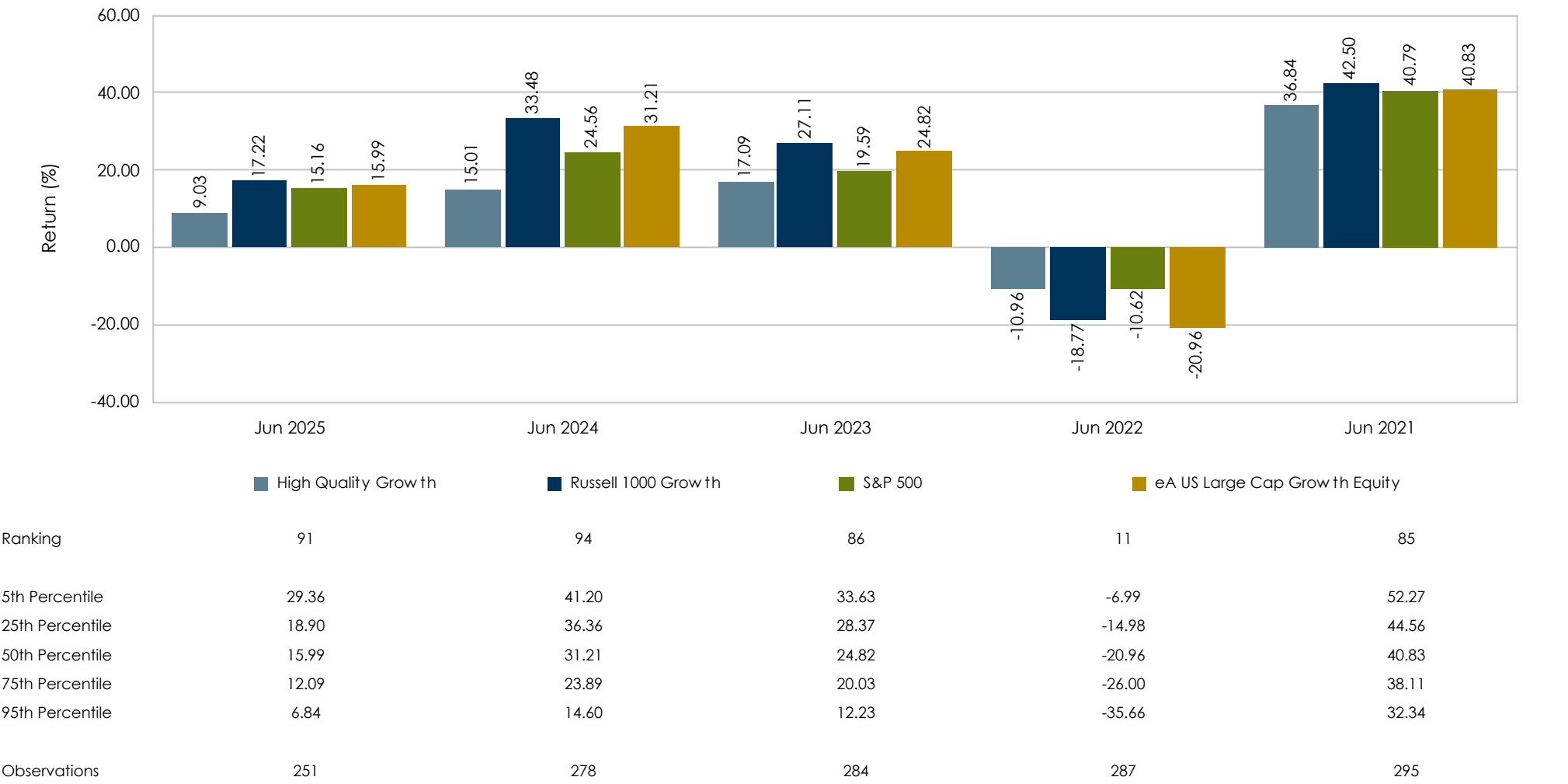
Atlanta Capital High Quality Growth

For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Atlanta Capital High Quality Growth
For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Atlanta Capital High Quality Growth

For the Periods Ending June 30, 2025

Portfolio Sector Allocations	Maximum	Actual Portfolio	Within Guidelines?	Comments
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Maximum sector concentration shall be no more than 30% in any one sector as defined by the Standard & Poor's GICS.

Communication Services	30.00%	4.80%	Yes	
Consumer Discretionary	30.00%	5.33%	Yes	
Consumer Staples	30.00%	2.76%	Yes	
Energy	30.00%	0.00%	Yes	
Financials	30.00%	22.76%	Yes	
Health Care	30.00%	17.27%	Yes	
Industrials	30.00%	10.09%	Yes	
Information Technology	30.00%	21.73%	Yes	
Materials	30.00%	8.05%	Yes	
Real Estate	30.00%	3.66%	Yes	
Utilities	30.00%	0.00%	Yes	

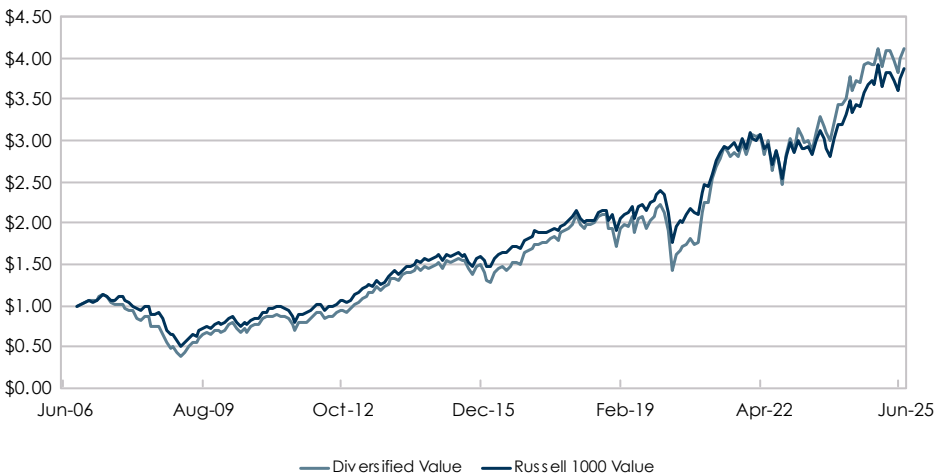
Allocation	Max. %	Actual Portfolio	Within Guidelines?	Comments
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A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.0%	3.55%	Yes	
A maximum of 5% of the portfolio may be invested in the securities of an individual corporation.	5.0%	4.82%	Yes	Largest Position Noted
A maximum of 10% of the portfolio, valued at market, may be invested in convertible issues (must have rating of Baa/BBB or better).	10.0%	0.00%	Yes	
A maximum of 5% of the portfolio, valued at market, may be invested in any one convertible issuer.	5.0%	0.00%	Yes	
Maximum of 20% of the Portfolio, valued at market, may be invested in ADRs and common stocks of corporations organized under the laws of any country other than the United States, which are traded primarily on a US stock exchange.	20.0%	5.40%	Yes	

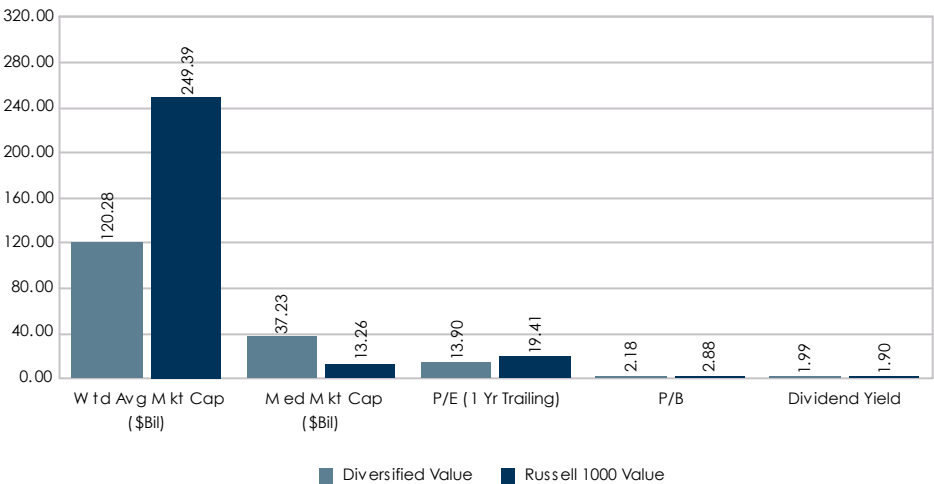
Hotchkis & Wiley Diversified Value

For the Periods Ending June 30, 2025

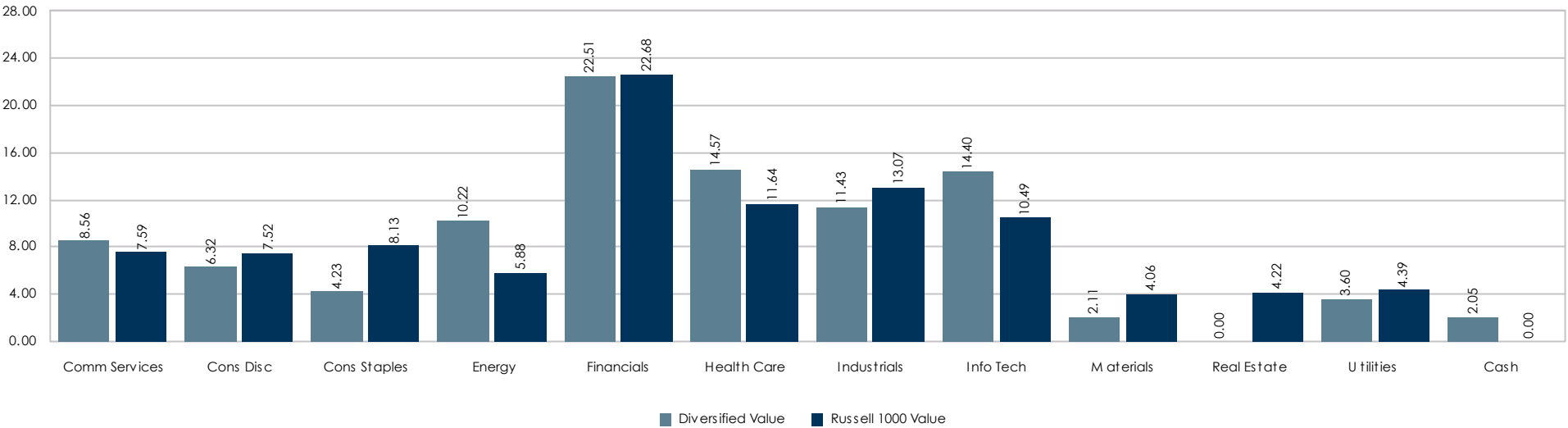
Growth of a Dollar



Characteristics



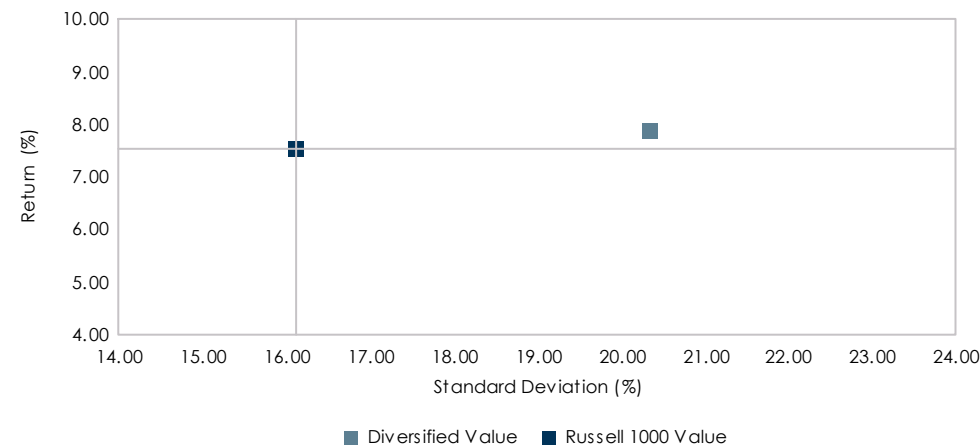
Sector Allocation



Hotchkis & Wiley Diversified Value

For the Periods Ending June 30, 2025

Risk / Return Since Nov 2006



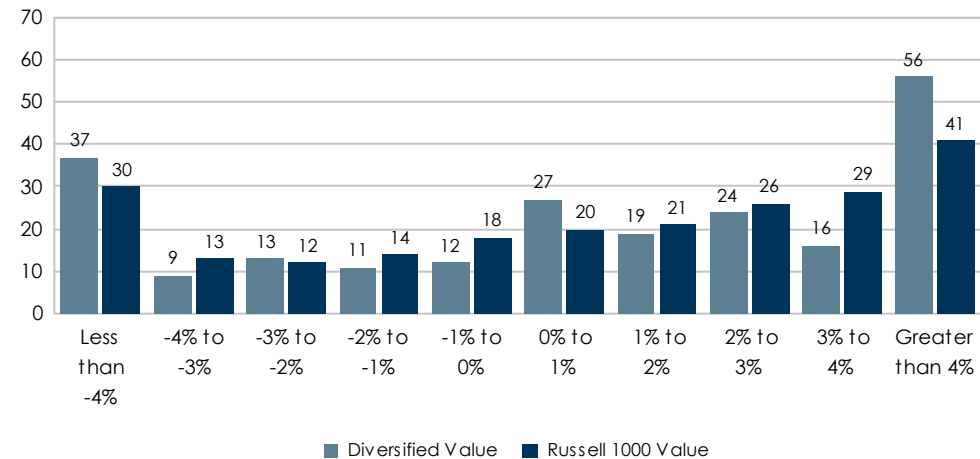
Portfolio Statistics Since Nov 2006

	Diversified Value	Russell 1000 Value
Return (%)	7.88	7.52
Standard Deviation (%)	20.33	16.12
Sharpe Ratio	0.32	0.38

Benchmark Relative Statistics

Beta	1.20
R Squared (%)	91.20
Alpha (%)	-0.64
Tracking Error (%)	6.88
Batting Average (%)	54.91
Up Capture (%)	117.78
Down Capture (%)	113.45

Return Histogram Since Nov 2006

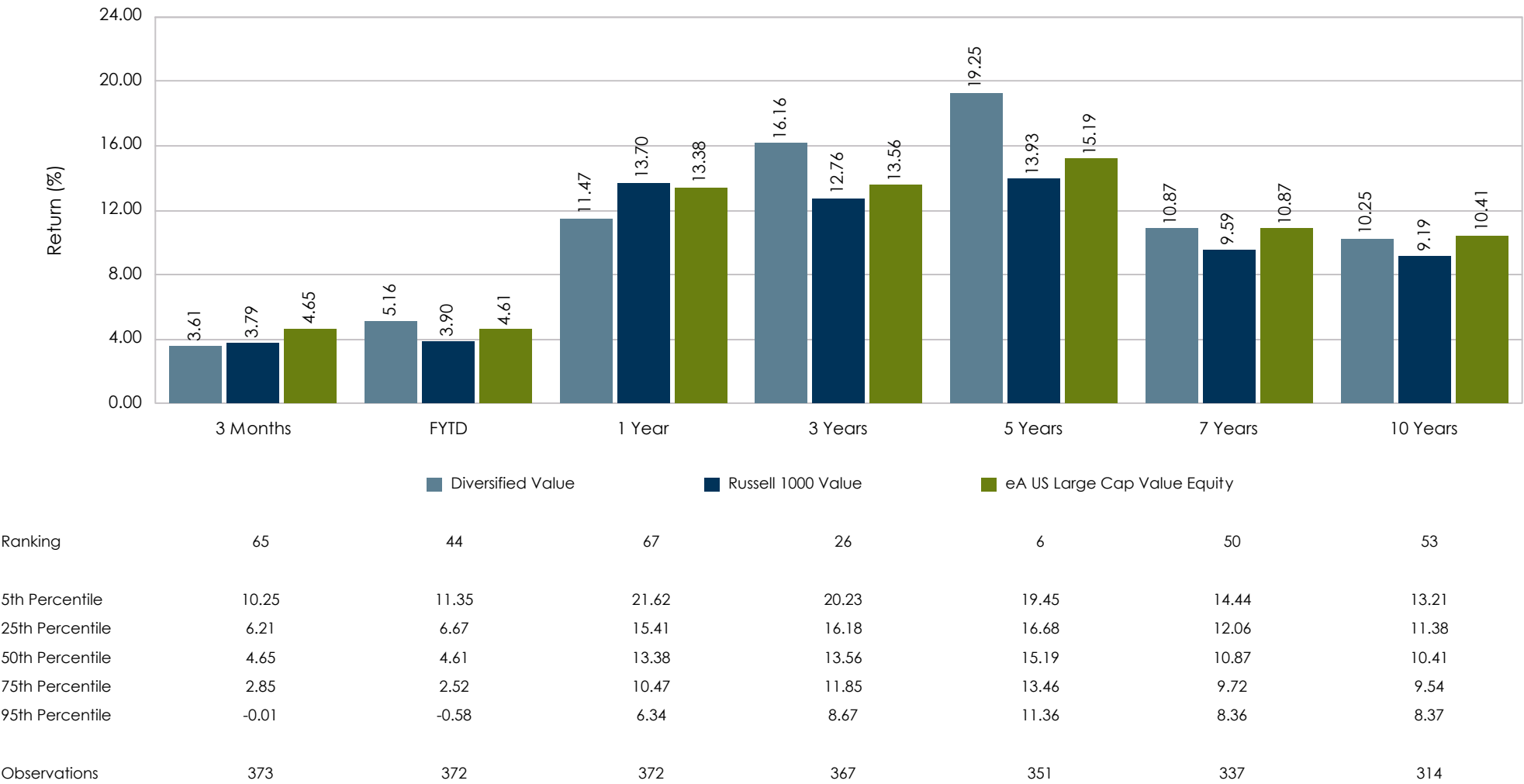


Return Analysis Since Nov 2006

	Diversified Value	Russell 1000 Value
Number of Months	224	224
Highest Monthly Return (%)	20.73	13.45
Lowest Monthly Return (%)	-24.98	-17.31
Number of Positive Months	142	137
Number of Negative Months	82	87
% of Positive Months	63.39	61.16

Hotchkis & Wiley Diversified Value

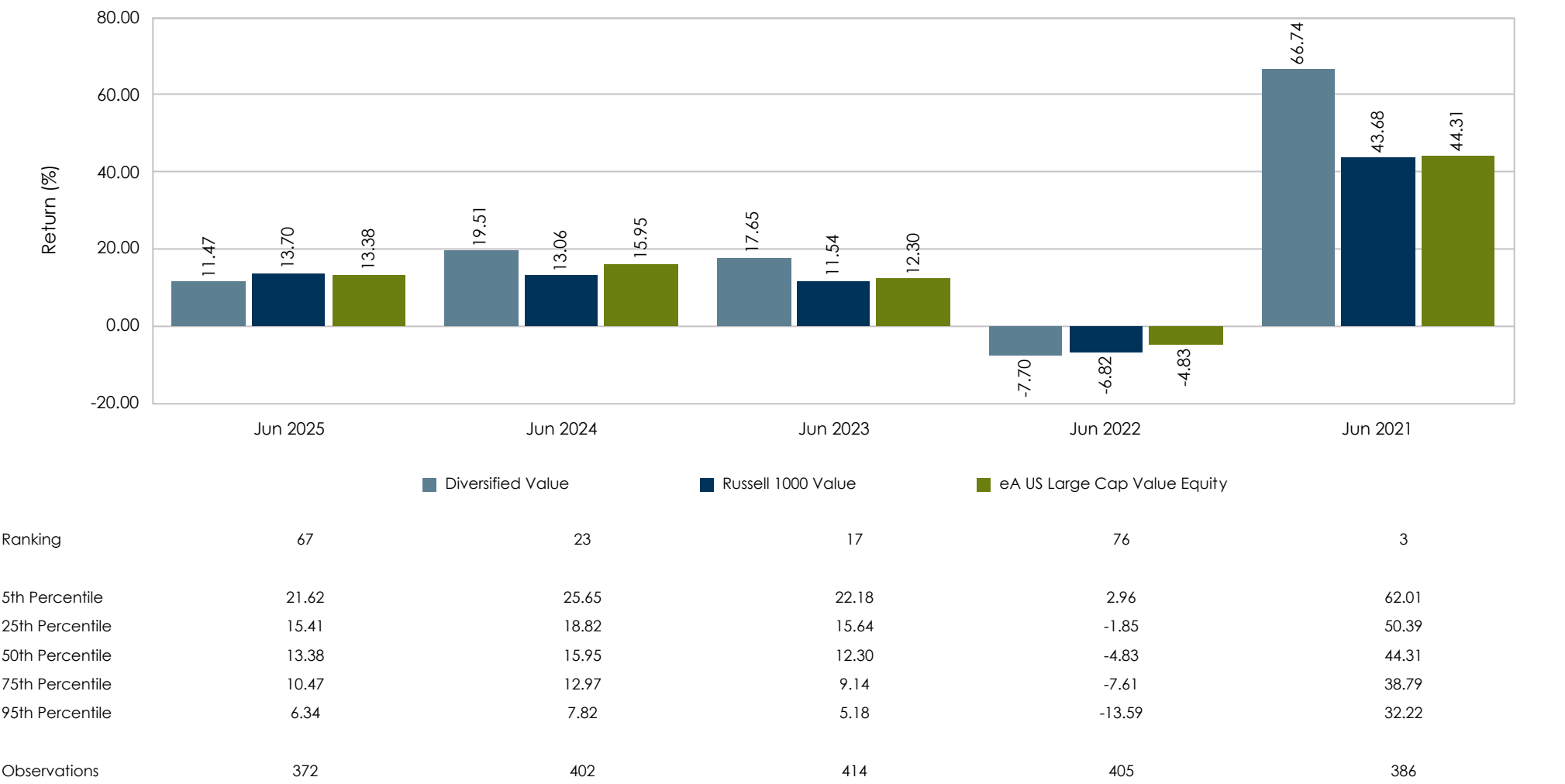
For the Periods Ending June 30, 2025



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Hotchkis & Wiley Diversified Value

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Hotchkis & Wiley Diversified Value

For the Periods Ending June 30, 2025

Portfolio Sector Allocations	Maximum	Actual Portfolio	Within Guidelines?	Comments
Maximum sector concentration shall be no more than 35% for any sector as defined by the Standard & Poor's GICS.				
Communication Services	35.00%	8.56%	Yes	
Consumer Discretionary	35.00%	6.32%	Yes	
Consumer Staples	35.00%	4.23%	Yes	
Energy	35.00%	10.22%	Yes	
Financials	35.00%	22.51%	Yes	
Health Care	35.00%	14.57%	Yes	
Industrials	35.00%	11.43%	Yes	
Information Technology	35.00%	14.40%	Yes	
Materials	35.00%	2.11%	Yes	
Real Estate	35.00%	0.00%	Yes	
Utilities	35.00%	3.60%	Yes	
Allocation	Max. %	Actual Portfolio	Within Guidelines?	Comments
A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.0%	2.05%	Yes	
The portfolio shall not own more than 5% of the outstanding common stock of any individual corporation.	5.0%	N/A	Yes	
A maximum of 7.5% of the portfolio may be invested in the securities of an individual corporation.	7.5%	4.95%	Yes	Largest Position Noted
A maximum of 10% of the portfolio, valued at market, may be invested in convertible issues (must have rating of Baa/BBB or better).	10.0%	0.00%	Yes	
A maximum of 5% of the portfolio, valued at market, may be invested in any one convertible issuer.	5.0%	0.00%	Yes	
A maximum of 20% of the portfolio, valued at cost, may be invested in common stocks of corporations that are organized under the laws of any country other than the United States and traded on the NYSE, AMEX, or NASDAQ.	20.0%	16.62%	Yes	

FMIvT Diversified SMID Cap Equity Portfolio

For the Periods Ending June 30, 2025

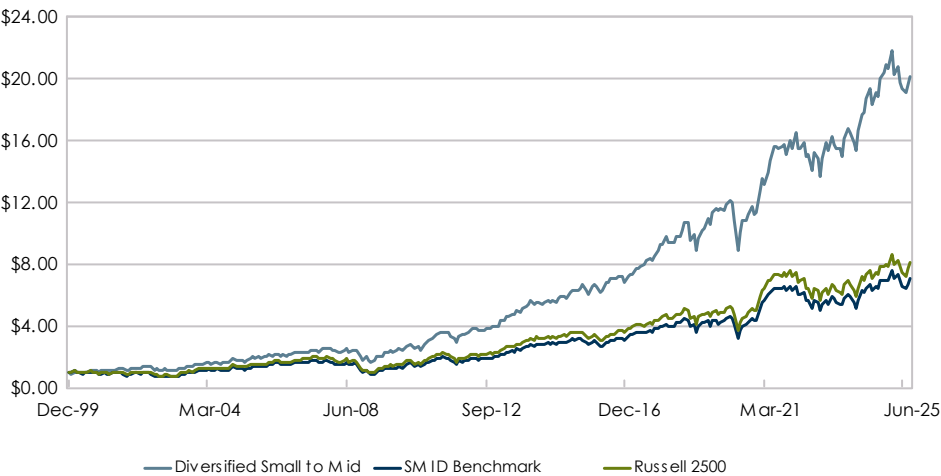
Portfolio Description	Portfolio Information
▪ Strategy Small to Mid (SMID) (Strategy change in 2010) ▪ Manager Atlanta Capital Management Company ▪ Vehicle Separately Managed Account ▪ Benchmark A blend of Russell 2500 and Russell 2000 ▪ Performance Inception Date January 2000 ▪ Fees Manager Fee - 45 bps; Admin Fee - 14.5 bps ▪ Total Expenses Approximately 62 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in small to mid cap core style common stocks of companies domiciled in the US or traded on the New York Stock Exchange. ▪ Outperform a blended index of the Russell 2500 beginning June 1, 2010 and the Russell 2000 prior to that, over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ Stock values fluctuate in response to the activities of individual companies, the general market and economic conditions. Shares of the Portfolio are neither insured nor guaranteed by any US Government agency, including the FDIC.			
		FYTD	1 Year
	Beginning Market Value	220,449	197,189
	Net Additions	-1,978	559
	Return on Investment	-8,252	12,470
	Income	1,667	2,153
	Gain/Loss	-9,919	10,317
	Ending Market Value	210,219	210,219

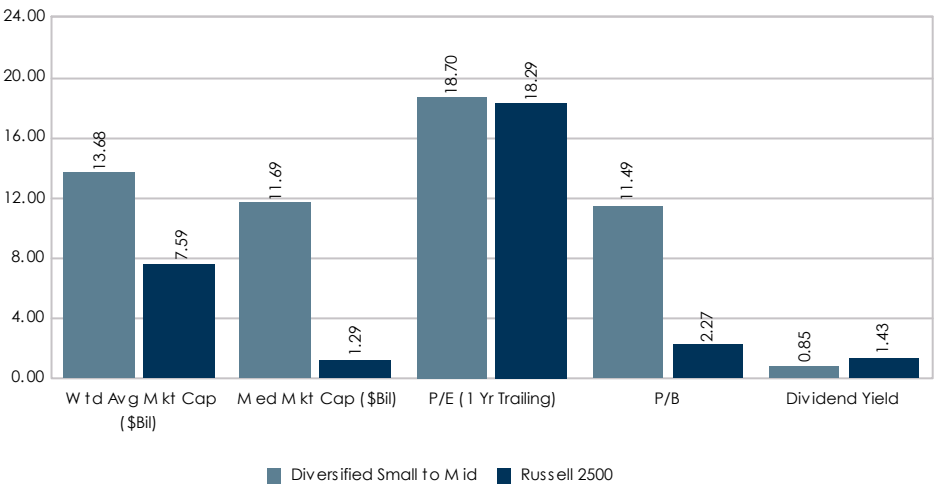
FMLvT Diversified SMID Cap Equity Portfolio

For the Periods Ending June 30, 2025

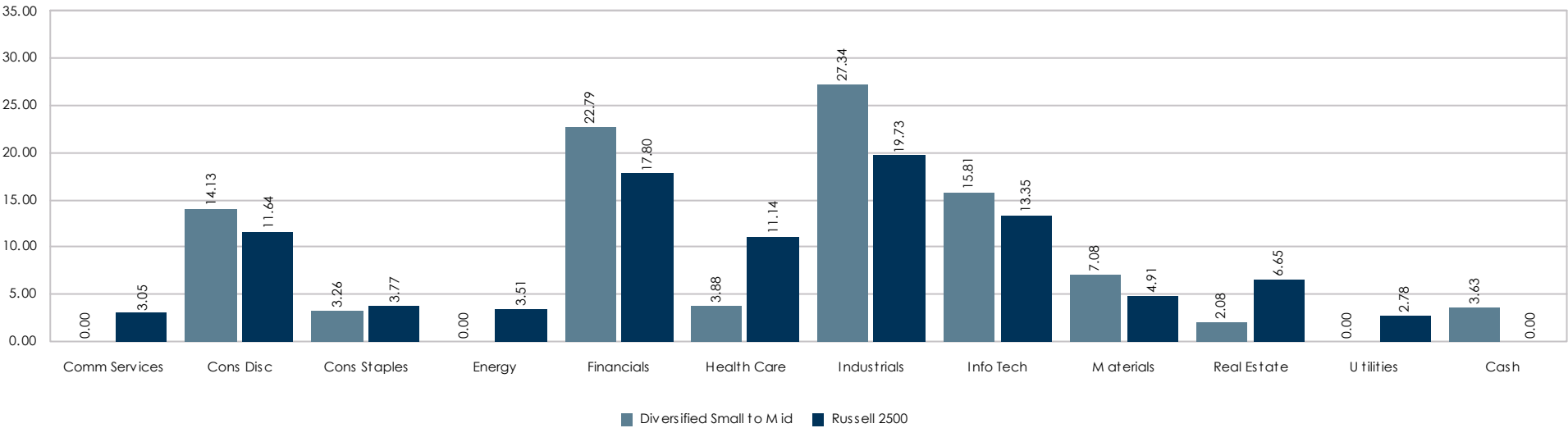
Growth of a Dollar



Characteristics



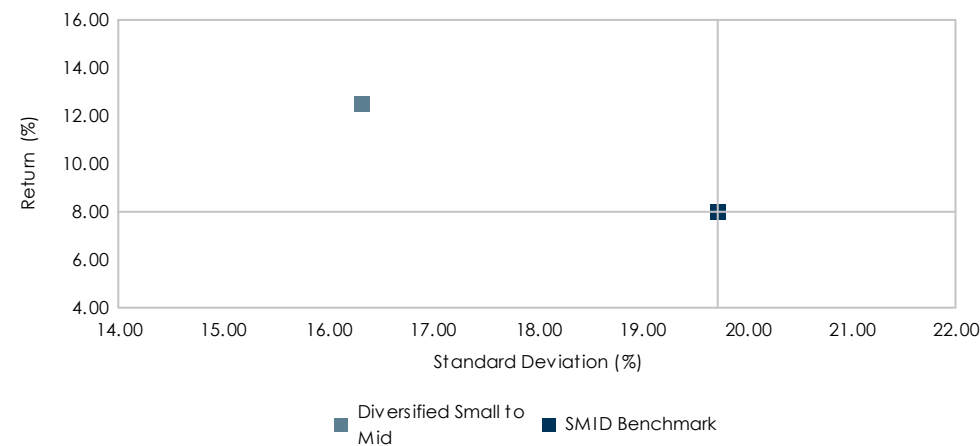
Sector Allocation



FMLvT Diversified SMID Cap Equity Portfolio

For the Periods Ending June 30, 2025

Risk / Return Since Jan 2000



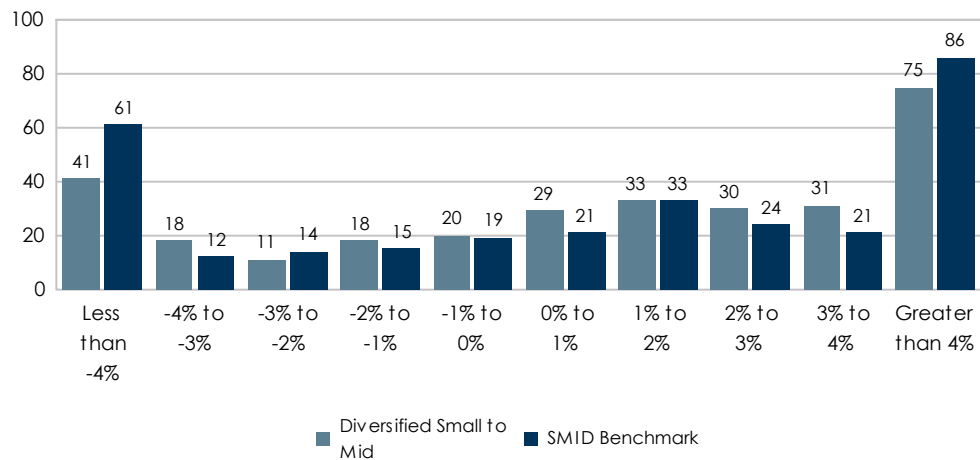
Portfolio Statistics Since Jan 2000

	Diversified Small to Mid	SMID Benchmark
Return (%)	12.48	7.99
Standard Deviation (%)	16.32	19.73
Sharpe Ratio	0.65	0.31

Benchmark Relative Statistics

Beta	0.76
R Squared (%)	85.40
Alpha (%)	5.92
Tracking Error (%)	7.78
Batting Average (%)	52.94
Up Capture (%)	84.59
Down Capture (%)	72.09

Return Histogram Since Jan 2000

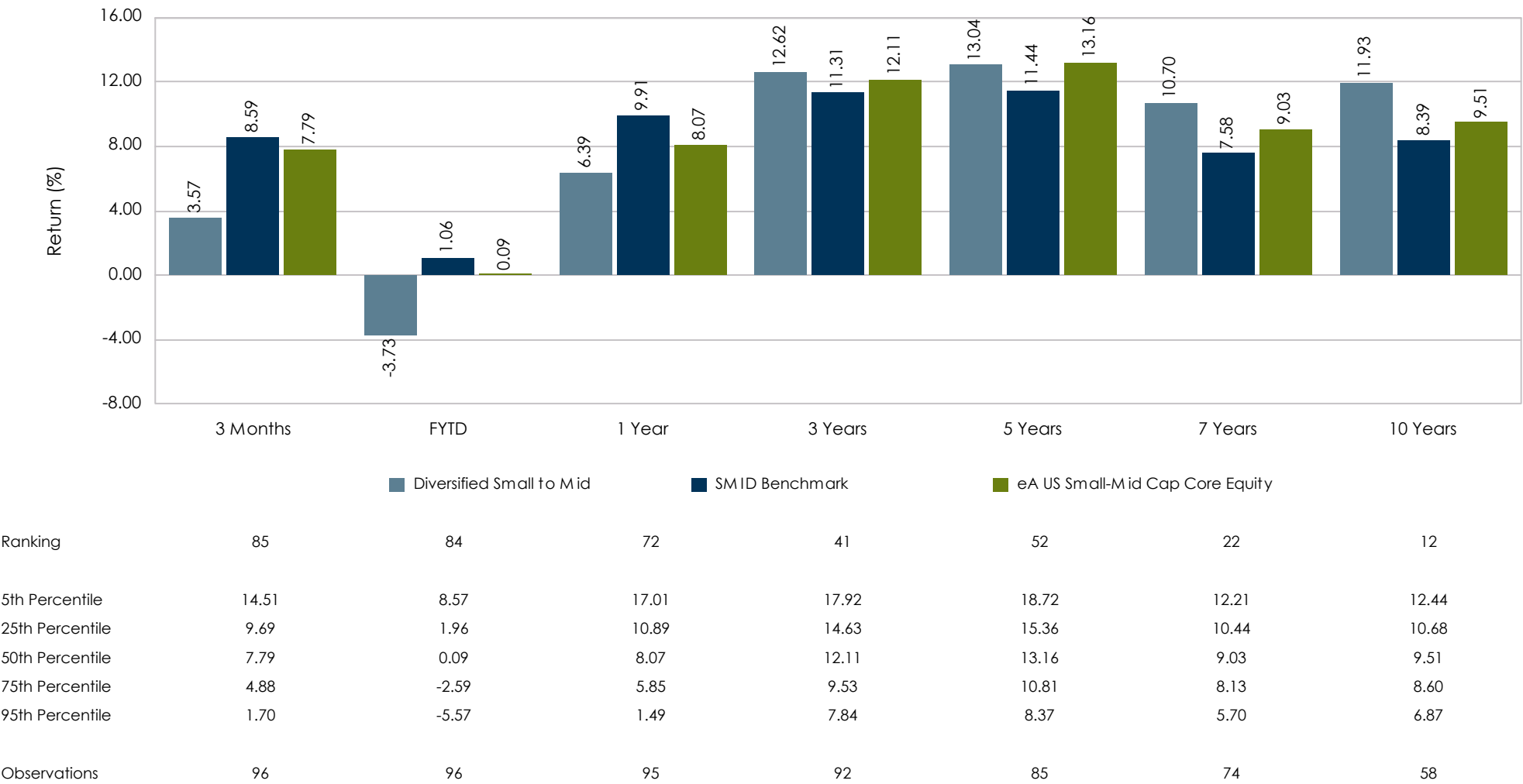


Return Analysis Since Jan 2000

	Diversified Small to Mid	SMID Benchmark
Number of Months	306	306
Highest Monthly Return (%)	15.00	16.51
Lowest Monthly Return (%)	-17.49	-21.70
Number of Positive Months	198	185
Number of Negative Months	108	121
% of Positive Months	64.71	60.46

FMLt Diversified SMID Cap Equity Portfolio

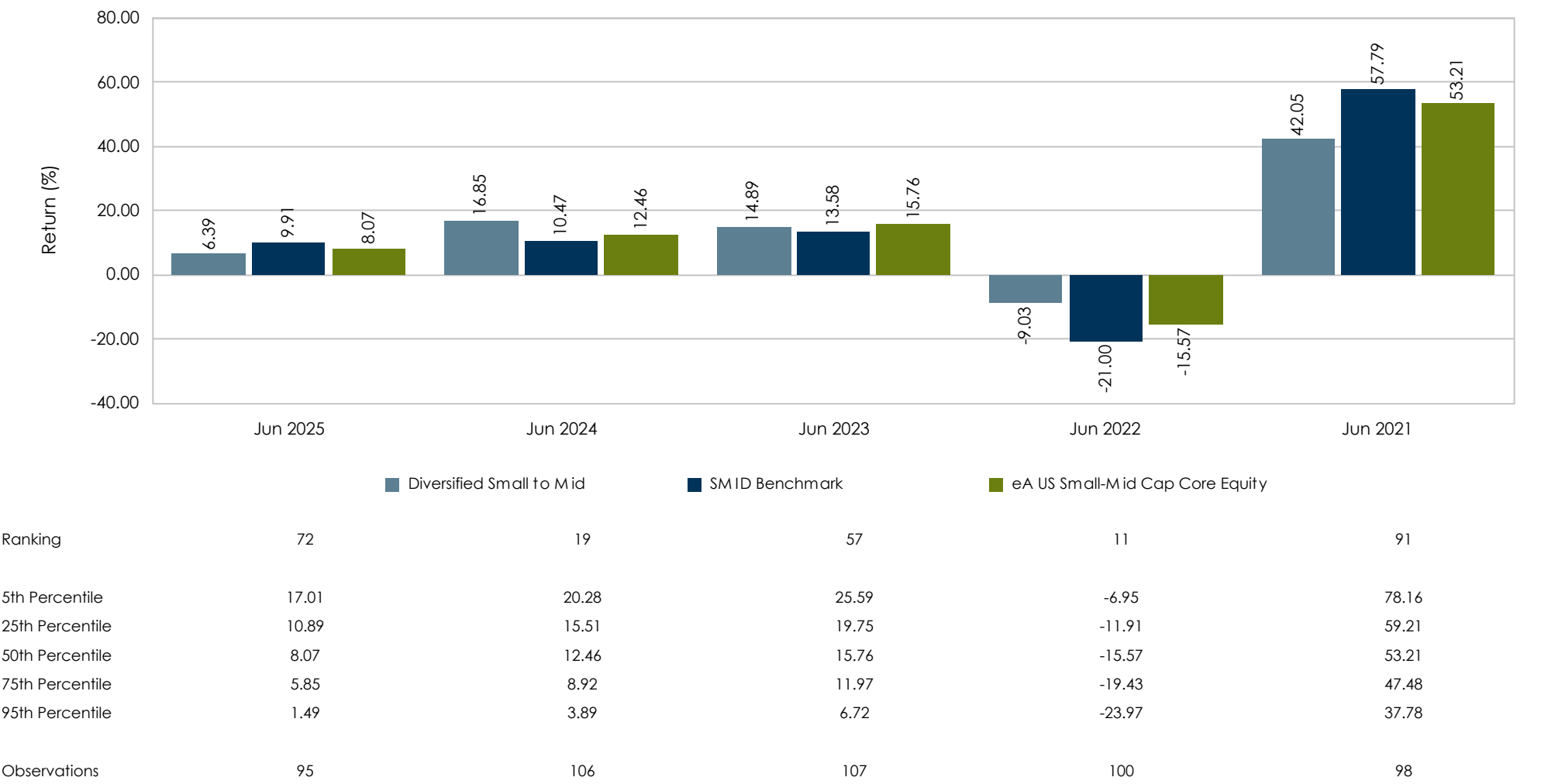
For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Diversified SMID Cap Equity Portfolio

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Diversified Small to Mid (SMID) Cap Equity Portfolio

For the Periods Ending June 30, 2025

Portfolio Sector Allocations	Maximum	Actual Portfolio	Within Guidelines?	Comments
Maximum sector concentration shall be no more than 30% in any one sector				
Communication Services	30.00%	0.00%	Yes	
Consumer Discretionary	30.00%	14.13%	Yes	
Consumer Staples	30.00%	3.26%	Yes	
Energy	30.00%	0.00%	Yes	
Financials	30.00%	22.79%	Yes	
Health Care	30.00%	3.88%	Yes	
Industrials	30.00%	27.34%	Yes	
Information Technology	30.00%	15.81%	Yes	
Materials	30.00%	7.08%	Yes	
Real Estate	30.00%	2.08%	Yes	
Utilities	30.00%	0.00%	Yes	
Allocation	Max. %	Actual Portfolio	Within Guidelines?	Comments
A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.00%	3.63%	Yes	
A maximum of 5% of the portfolio may be invested in the securities of an individual corporation.	5.00%	4.52%	Yes	Largest Position Noted
A maximum of 10% of the portfolio, valued at market, may be invested in convertible issues (must have rating of Baa/BBB or better).	10.00%	0.00%	Yes	
A maximum of 5% of the portfolio, valued at market, may be invested in any one convertible issuer.	5.00%	0.00%	Yes	
A maximum of 10% of the portfolio, valued at cost, may be invested in common stocks of corporations that are organized under the laws of any country other than the United States and traded on the NYSE, AMEX, or NASDAQ.	10.00%	0.00%	Yes	

FMIVT International Equity Portfolio

For the Periods Ending June 30, 2025

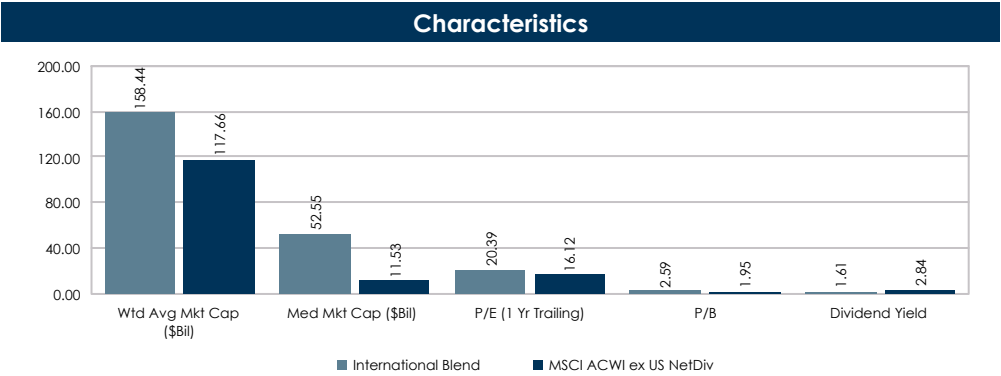
Portfolio Description	Portfolio Information
▪ Strategy International Equity ▪ Manager Ninety One Asset Management and Allspring Global Investments ▪ Vehicle Non-Mutual Commingled ▪ Benchmark MSCI ACWI ex US ▪ Performance Inception Date June 2005 (Manager changes April 2011, October 2014 & October 2017) ▪ Fees Manager Fee - 43 bps; Admin Fee - 14.5 bps ▪ Total Expenses Approximately 59 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in developed and emerging markets outside the US. Maintains approximately equal weightings to both growth and value securities through a systematic rebalancing process. ▪ Outperform the MSCI ACWI ex US NetDiv over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ Stock values fluctuate in response to the activities of individual companies, the general market and economic conditions. Investments in foreign securities generally pose greater risk than domestic securities.			
		FYTD	1 Year
	Beginning Market Value	232,932	221,997
	Net Additions	3,937	6,609
	Return on Investment	40,007	48,271
	Ending Market Value	276,876	276,876

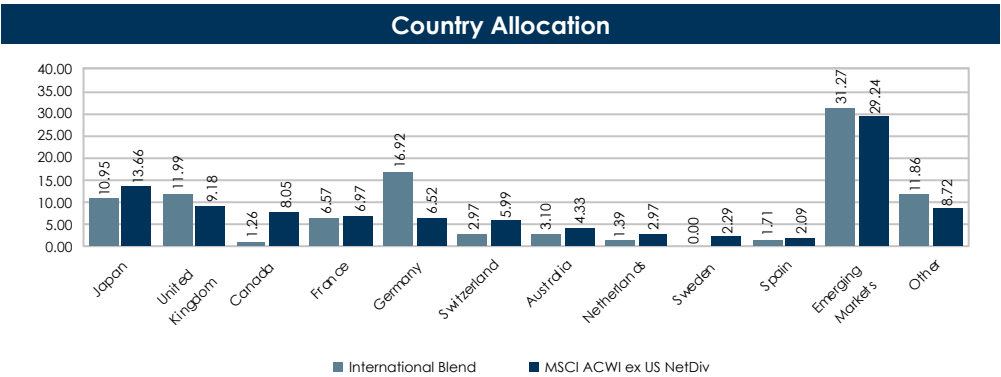
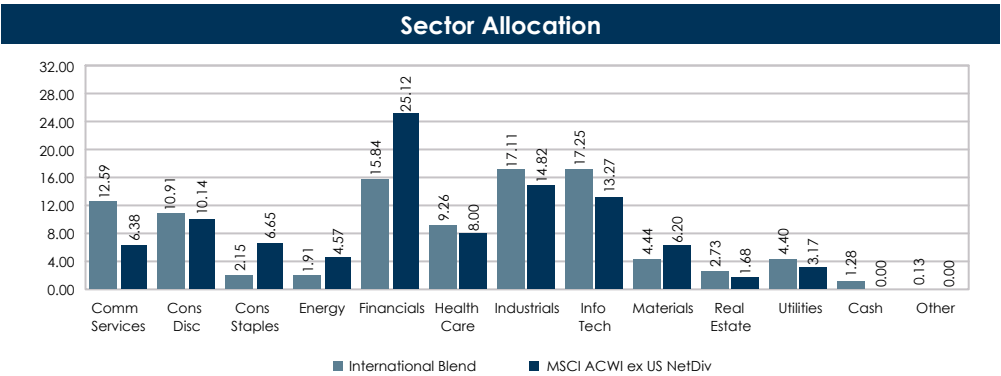
FMlvt International Equity Portfolio

For the Periods Ending June 30, 2025

Manager Allocation		
Name	Market Value (\$000s)	Allocation (%)
Total International Blend	276,876	100.00
Ninety One International Equity Fund	256,588	92.67
Allspring EM Large/Mid Cap Eq	20,288	7.33



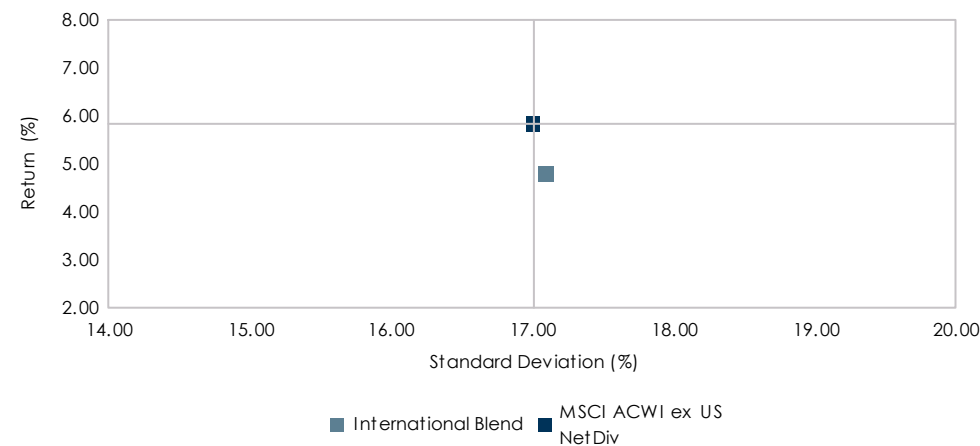
Dollar Growth Summary (\$000s)		
	FYTD	1 Year
Beginning Market Value	232,932	221,997
Net Additions	3,937	6,609
Return on Investment	40,007	48,271
Ending Market Value	276,876	276,876



FMIVT International Equity Portfolio

For the Periods Ending June 30, 2025

Risk / Return Since Jul 2005



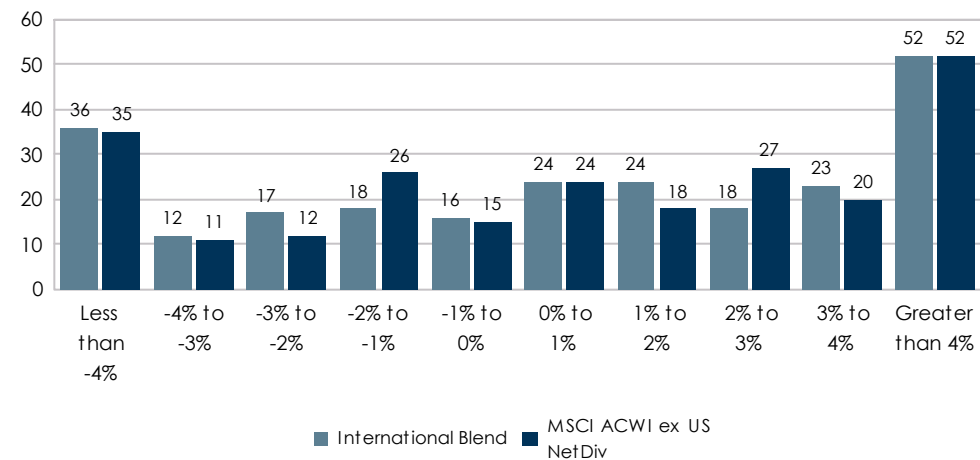
Portfolio Statistics Since Jul 2005

	International Blend	MSCI ACWI ex US NetDiv
Return (%)	4.81	5.83
Standard Deviation (%)	17.10	17.00
Sharpe Ratio	0.19	0.25

Benchmark Relative Statistics

Beta	0.98
R Squared (%)	94.72
Alpha (%)	-0.80
Tracking Error (%)	3.95
Batting Average (%)	48.33
Up Capture (%)	96.27
Down Capture (%)	100.78

Return Histogram Since Jul 2005

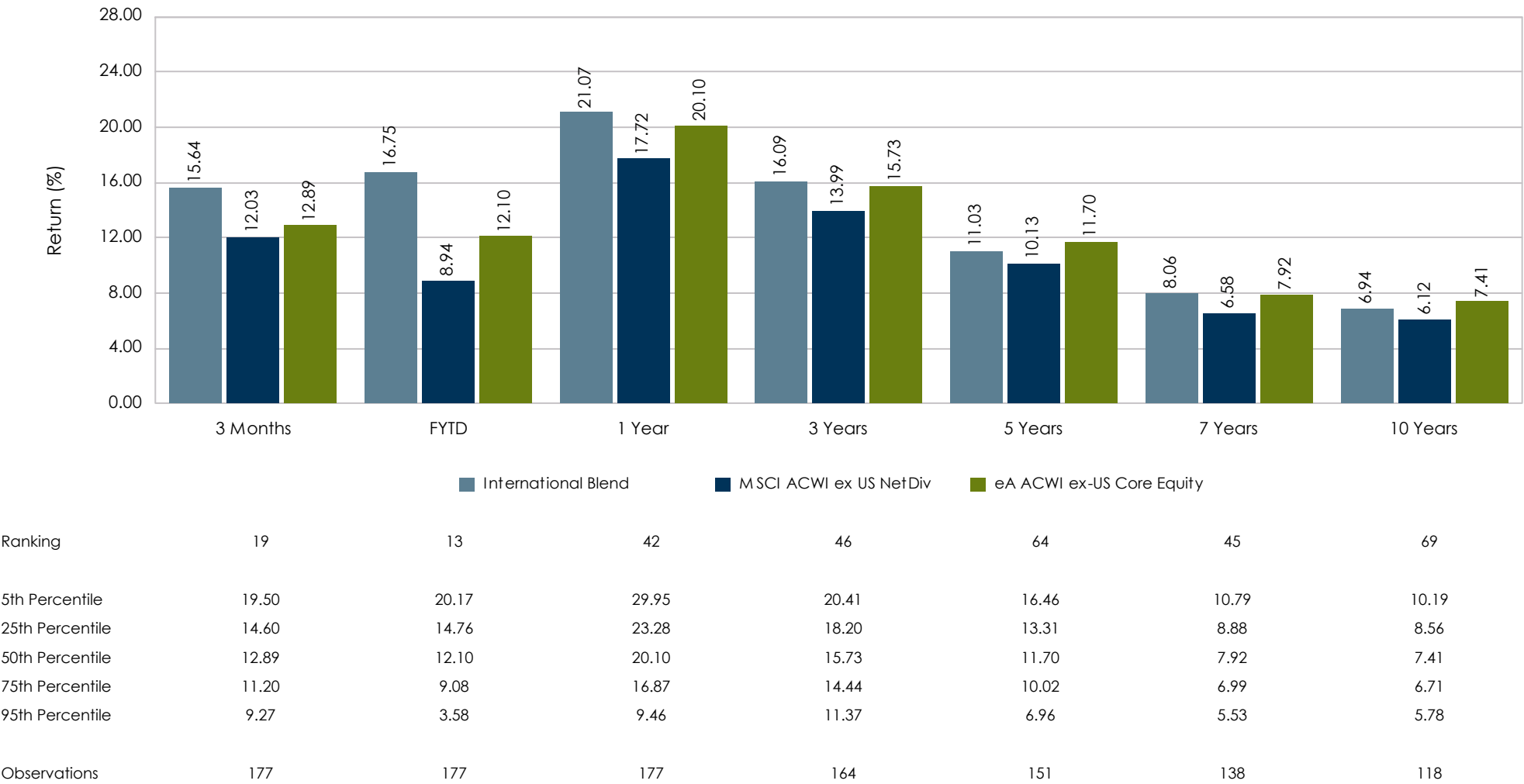


Return Analysis Since Jul 2005

	International Blend	MSCI ACWI ex US NetDiv
Number of Months	240	240
Highest Monthly Return (%)	12.03	13.63
Lowest Monthly Return (%)	-21.48	-22.02
Number of Positive Months	141	141
Number of Negative Months	99	99
% of Positive Months	58.75	58.75

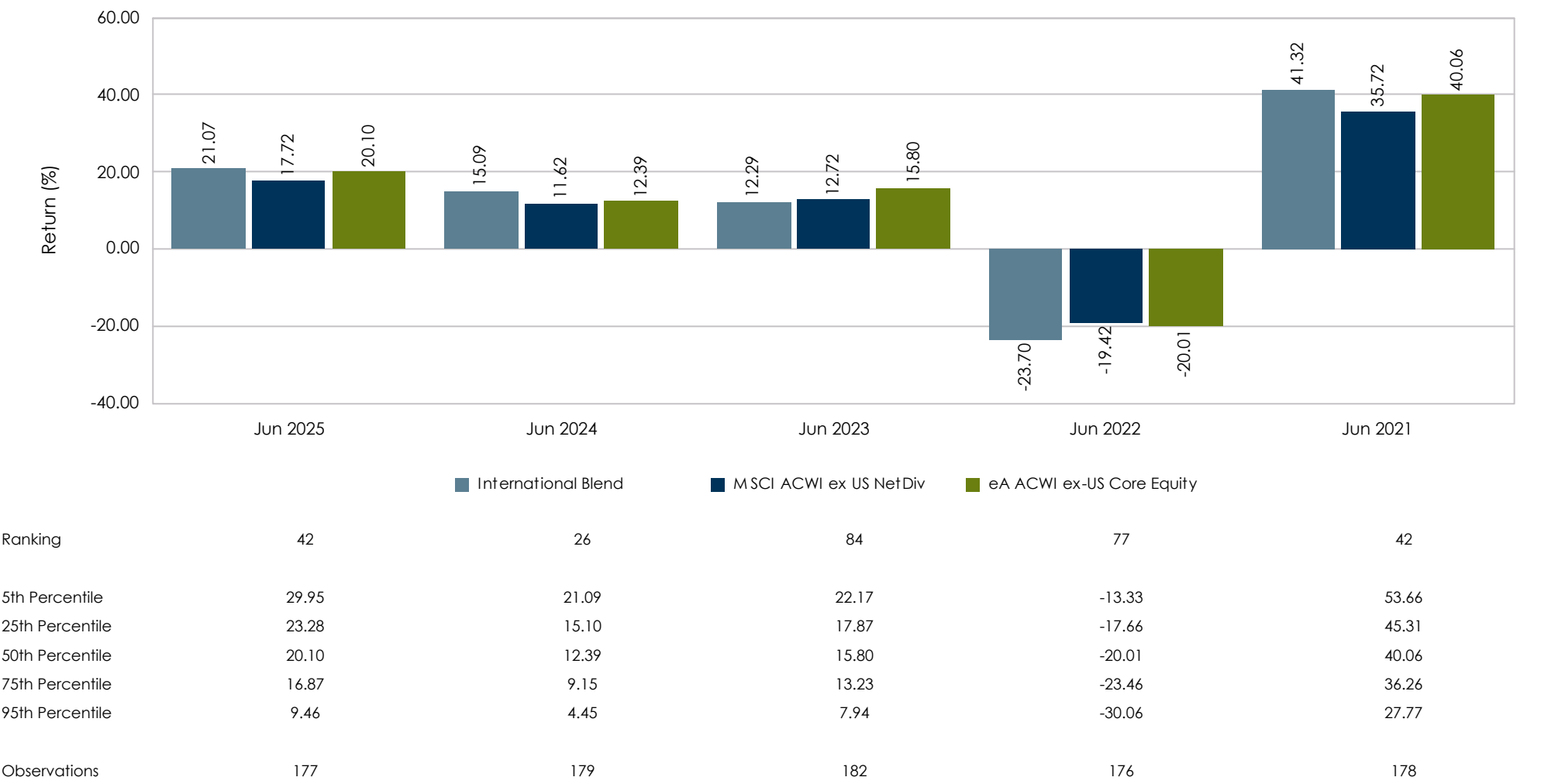
FMIvT International Equity Portfolio

For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT International Equity Portfolio
For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines**International Equity Portfolio***For the Periods Ending June 30, 2025*

Manager Allocations	Target %	Range%	Actual Portfolio	Within Guidelines?	Comments
Ninety One International Equity Fund	90.00%	80% - 100%	92.67%	Yes	
Allspring EM Large/Mid Cap Eq Fund	10.00%	0% - 20%	7.33%	Yes	
Allocation	Max. %		Actual Portfolio	Within Guidelines?	Comments
A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.0%		1.28%	Yes	

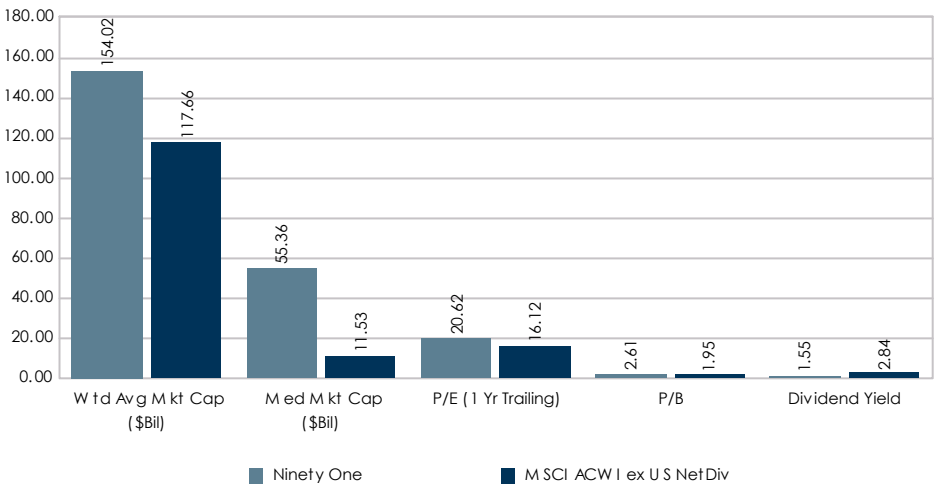
Ninety One International Equity Fund

For the Periods Ending June 30, 2025

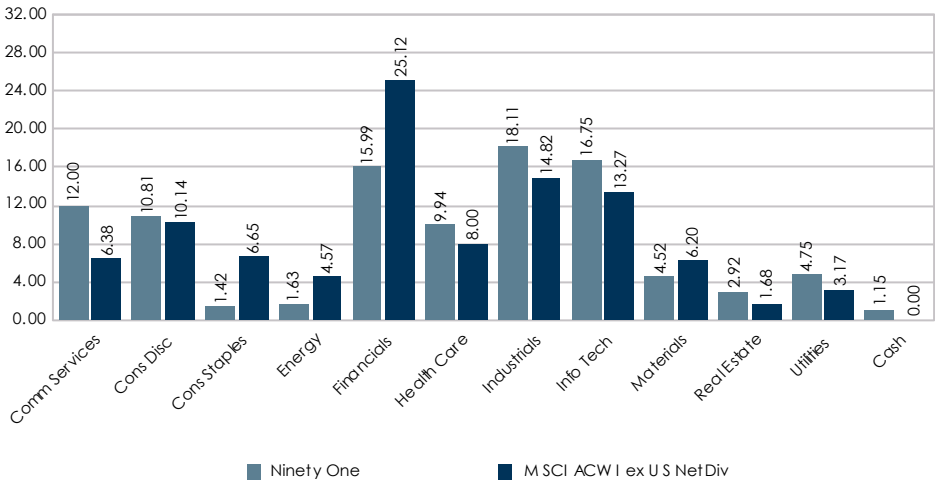
Growth of a Dollar



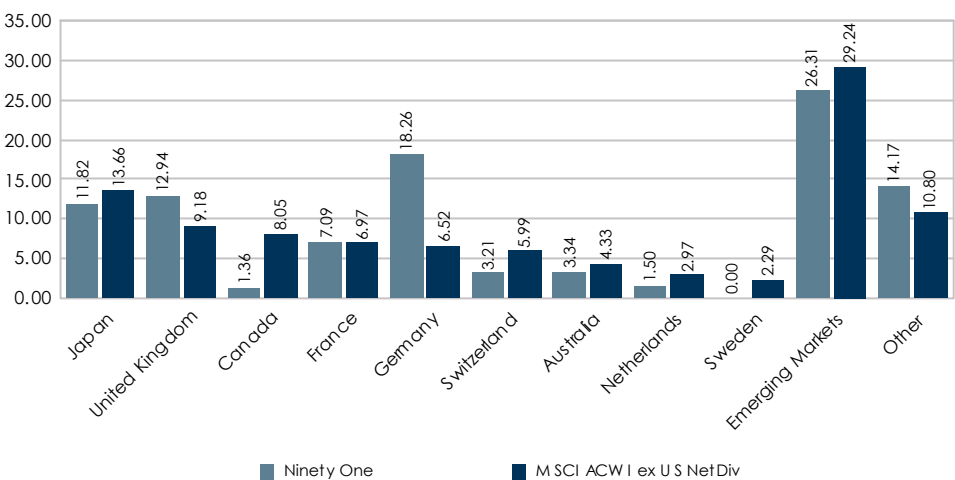
Characteristics



Sector Allocation



Country Allocation

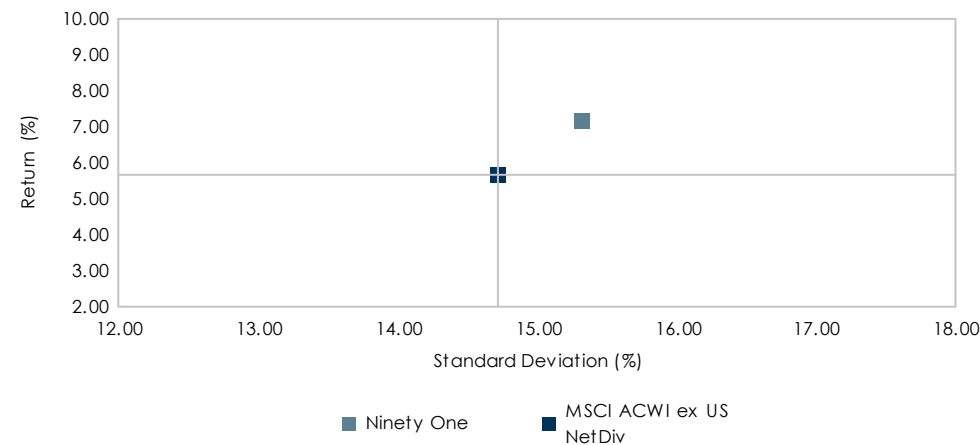


Characteristic and allocation charts represents data of the Ninety-One International Equity (Non-Mutual Commingled).

Ninety One International Equity Fund

For the Periods Ending June 30, 2025

Risk / Return Since Oct 2014



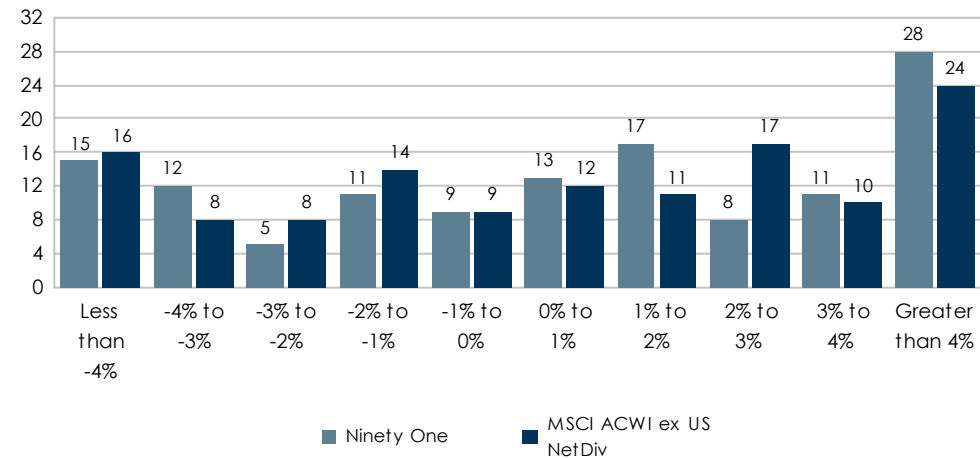
Portfolio Statistics Since Oct 2014

	Ninety One	MSCI ACWI ex US NetDiv
Return (%)	7.15	5.68
Standard Deviation (%)	15.31	14.71
Sharpe Ratio	0.35	0.26

Benchmark Relative Statistics

Beta	1.00
R Squared (%)	92.36
Alpha (%)	1.48
Tracking Error (%)	4.23
Batting Average (%)	55.81
Up Capture (%)	103.56
Down Capture (%)	96.67

Return Histogram Since Oct 2014

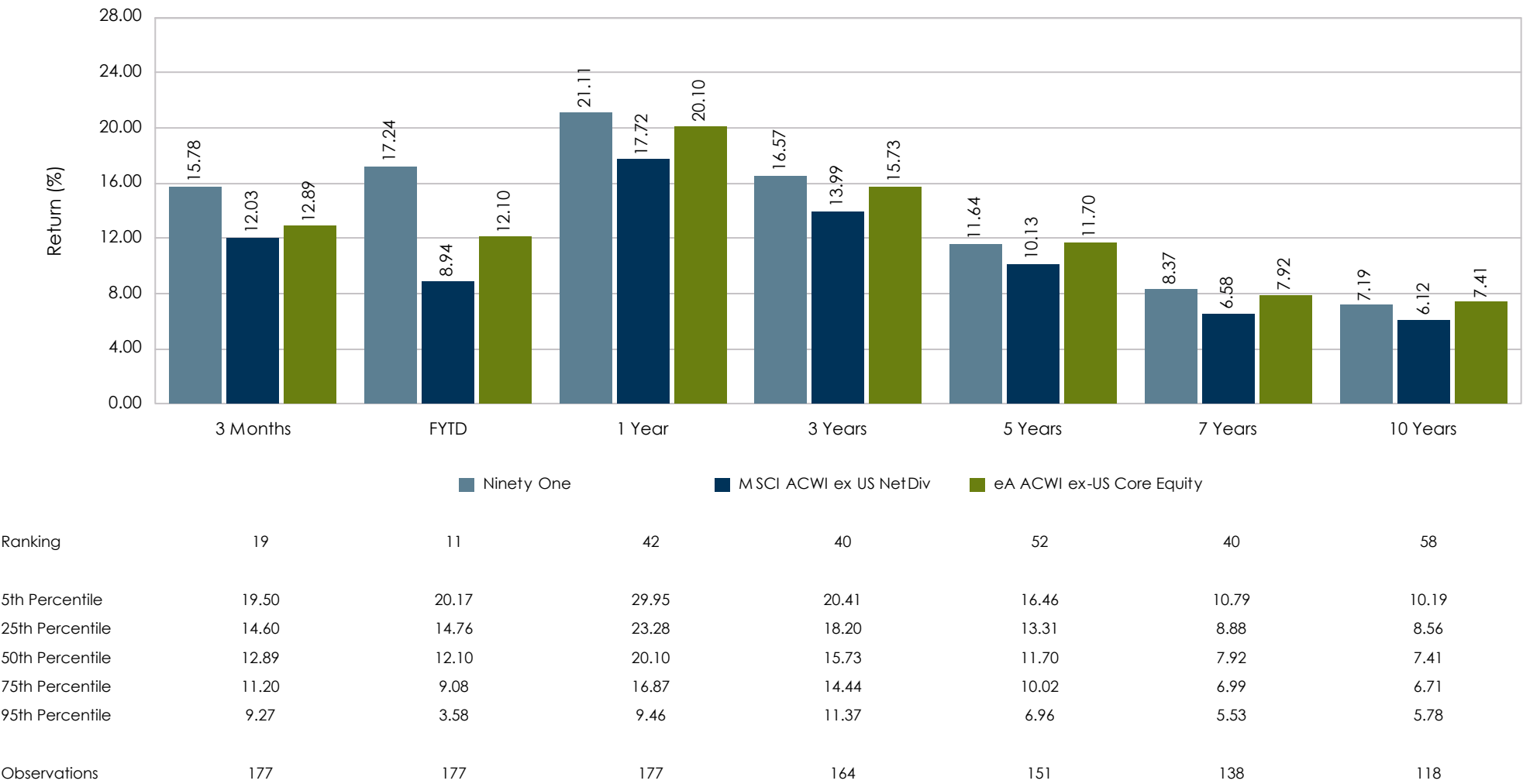


Return Analysis Since Oct 2014

	Ninety One	MSCI ACWI ex US NetDiv
Number of Months	129	129
Highest Monthly Return (%)	12.16	13.45
Lowest Monthly Return (%)	-16.65	-14.48
Number of Positive Months	77	74
Number of Negative Months	52	55
% of Positive Months	59.69	57.36

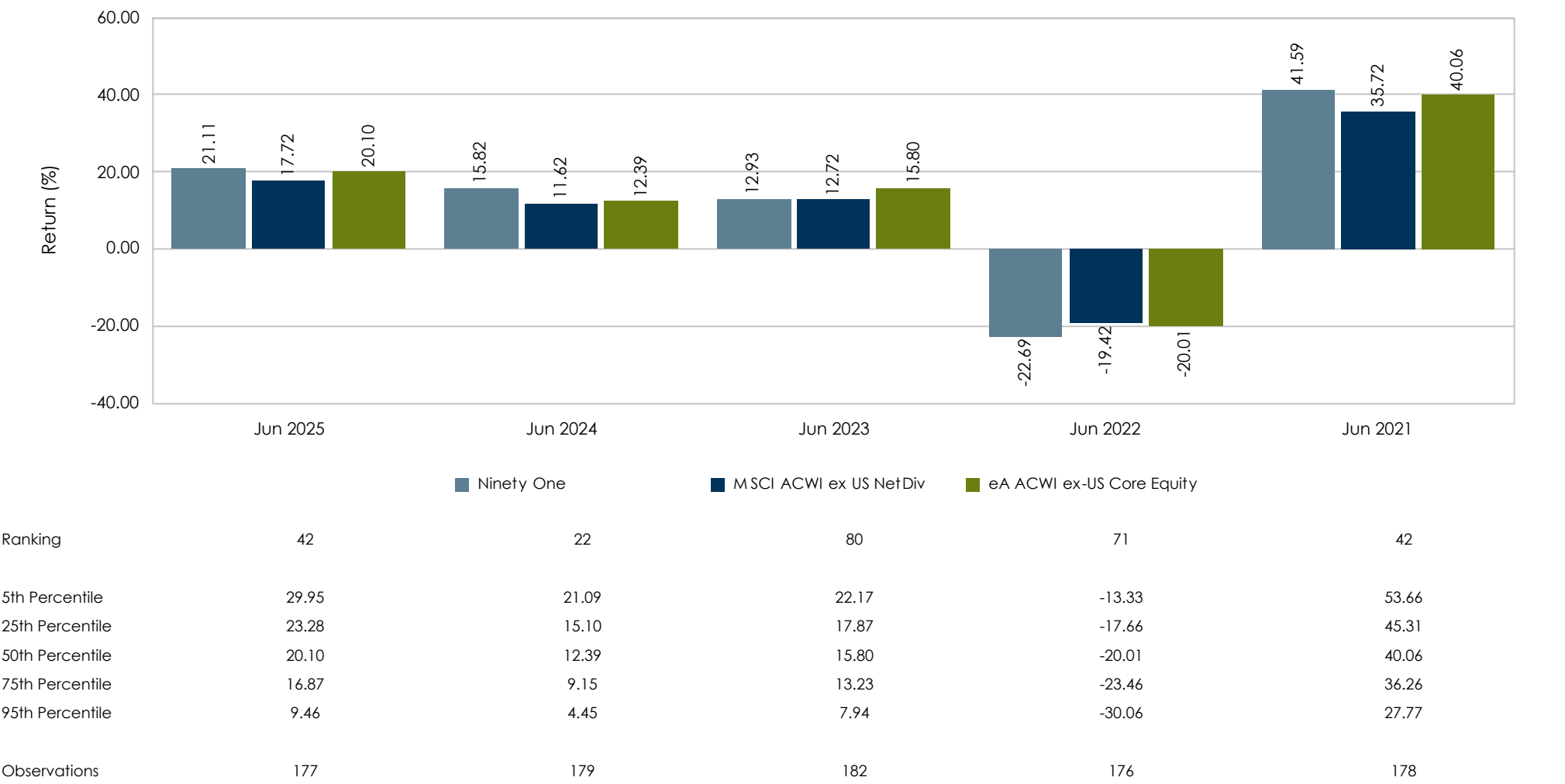
Ninety One International Equity Fund

For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Ninety One International Equity Fund
For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

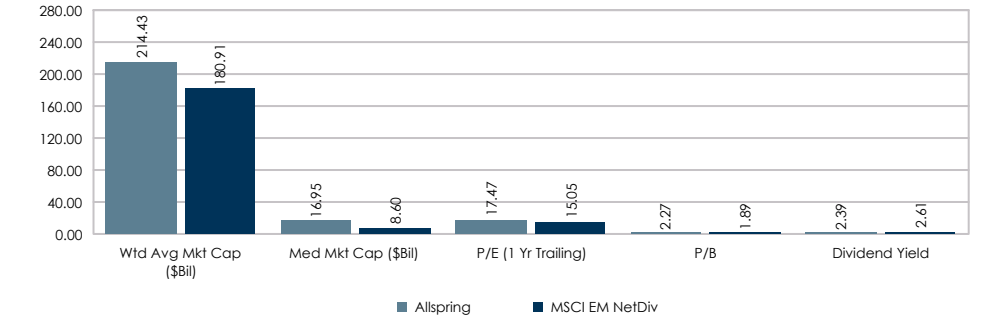
Allspring EM Large/Mid Cap Eq

For the Periods Ending June 30, 2025

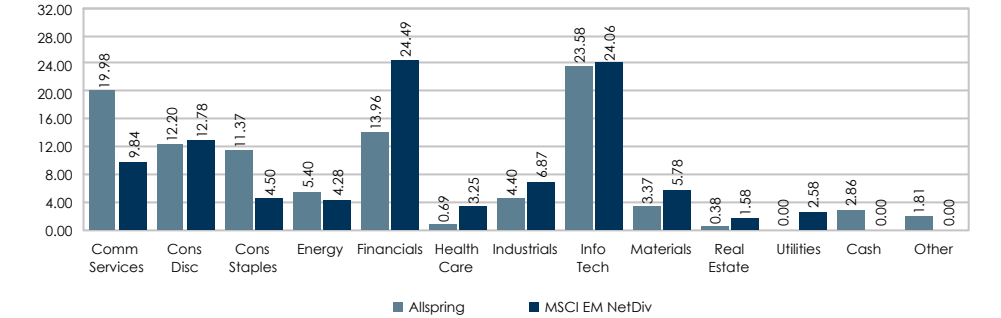
Account Description

- **Strategy** Emerging Markets Equity
- **Vehicle** Non-Mutual Commingled
- **Benchmark** MSCI EM NetDiv
- **Performance Inception Date** November 2017

Characteristics



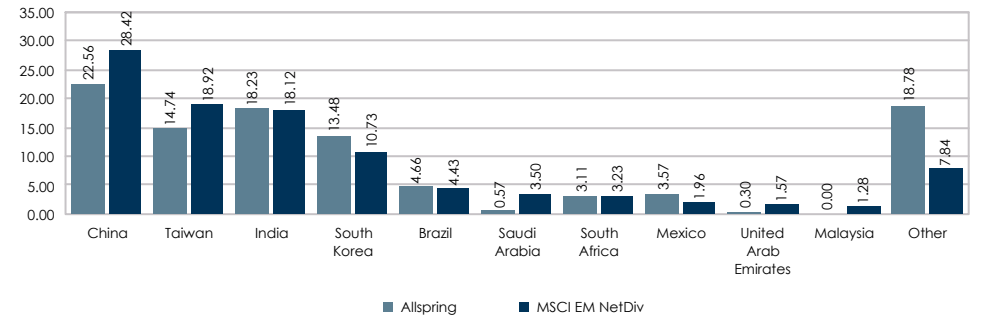
Sector Allocation



Dollar Growth Summary (\$000s)

	FYTD	1 Year
Beginning Market Value	18,312	16,851
Net Additions	-4	-5
Return on Investment	1,980	3,443
Ending Market Value	20,288	20,288

Country Allocation

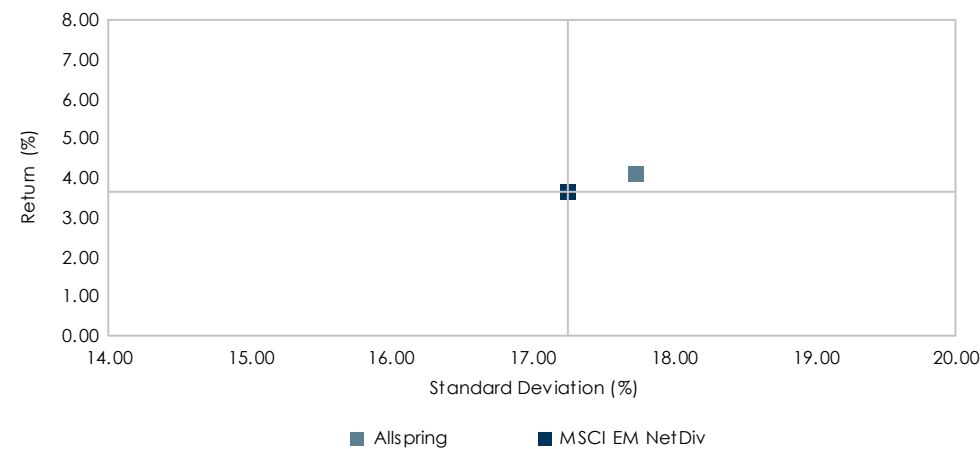


Characteristic and allocation charts represents data of the Allspring Emerging Markets Large/Mid Cap Fund (Non-Mutual Commingled).

Allspring EM Large/Mid Cap Eq

For the Periods Ending June 30, 2025

Risk / Return Since Nov 2017



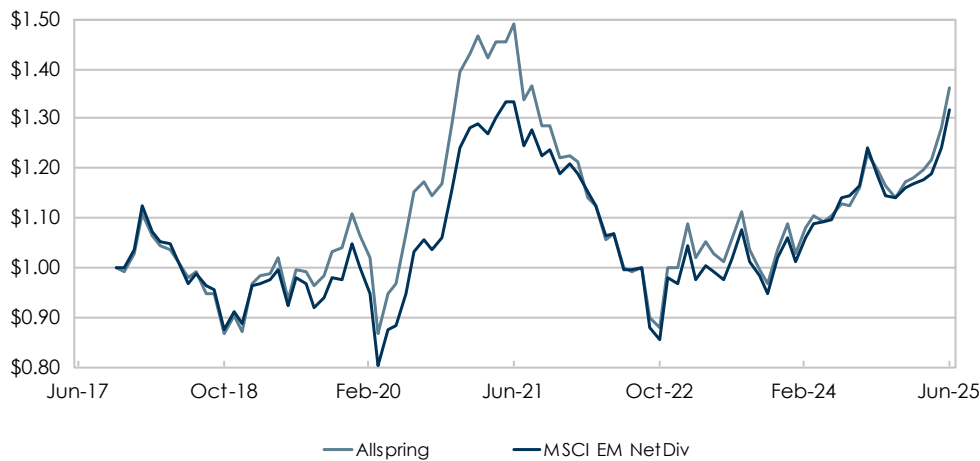
Portfolio Statistics Since Nov 2017

	Allspring	MSCI EM NetDiv
Return (%)	4.11	3.65
Standard Deviation (%)	17.73	17.25
Sharpe Ratio	0.09	0.07

Benchmark Relative Statistics

Beta	1.00
R Squared (%)	94.89
Alpha (%)	0.52
Tracking Error (%)	4.01
Batting Average (%)	55.43
Up Capture (%)	103.69
Down Capture (%)	101.08

Growth of a Dollar Since Nov 2017

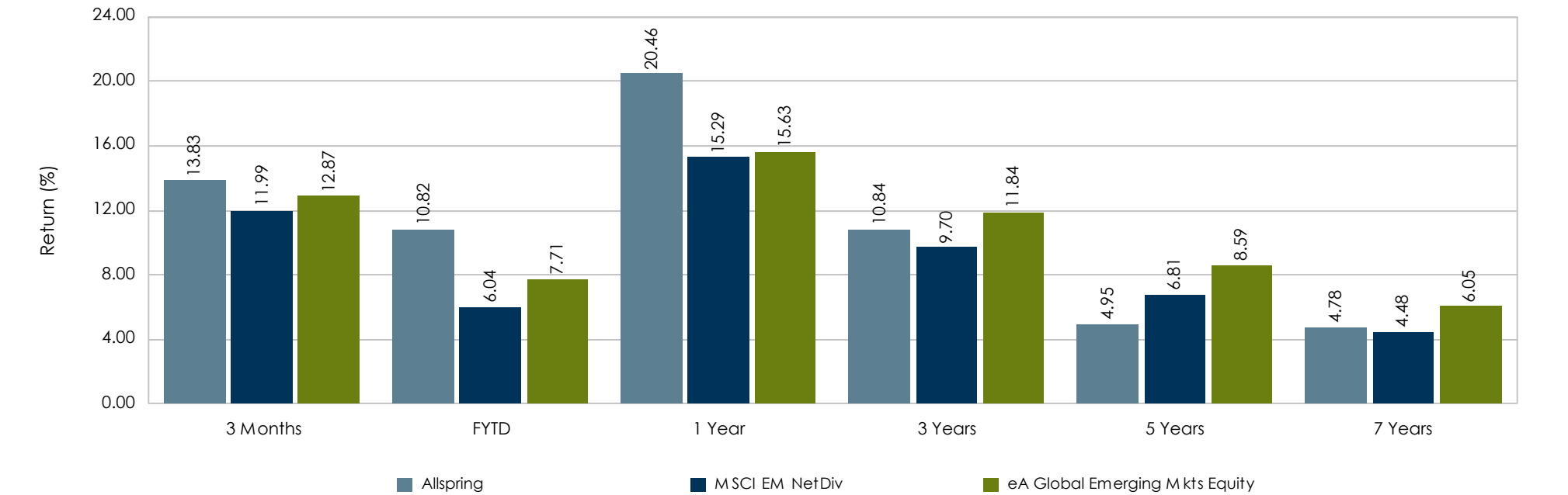


Return Analysis Since Nov 2017

	Allspring	MSCI EM NetDiv
Number of Months	92	92
Highest Monthly Return (%)	14.02	14.83
Lowest Monthly Return (%)	-14.87	-15.40
Number of Positive Months	50	52
Number of Negative Months	42	40
% of Positive Months	54.35	56.52

Allspring EM Large/Mid Cap Eq

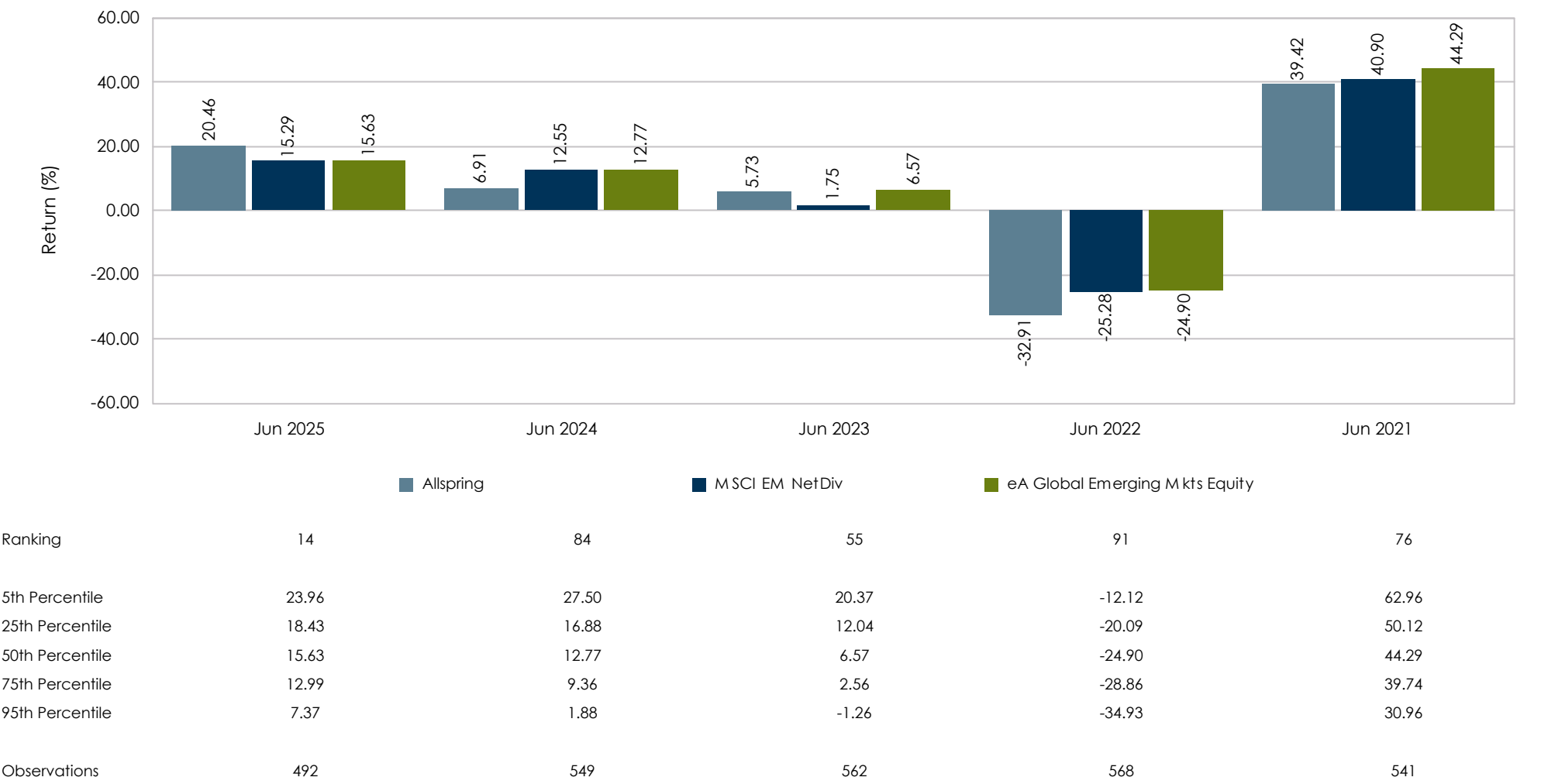
For the Periods Ending June 30, 2025



Ranking	34	20	14	58	91	75
5th Percentile	18.86	14.87	23.96	19.77	16.61	10.66
25th Percentile	14.49	10.21	18.43	14.70	11.75	7.58
50th Percentile	12.87	7.71	15.63	11.84	8.59	6.05
75th Percentile	11.54	5.60	12.99	9.53	6.57	4.77
95th Percentile	8.59	0.94	7.37	6.86	3.94	3.29
Observations	493	493	492	469	424	380

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Allspring EM Large/Mid Cap Eq
For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Core Real Estate Portfolio

For the Periods Ending June 30, 2025

Portfolio Description	Portfolio Information
■ Strategy Core Real Estate ■ Manager Morgan Stanley Real Estate Advisor, Inc. ■ Vehicle Non-Mutual Commingled ■ Benchmark NFI ODCE Net Index ■ Performance Inception Date April 2018 ■ Fees Manager Fees - 124 bps; Admin Fees - 14.5 bps ■ Total Expenses Approximately 141 bps	■ Minimum initial investment \$50,000 ■ Minimum subsequent investments \$5,000 ■ Minimum redemption \$5,000 or Member's entire remaining account balance if the Member's balance falls below \$50,000 ■ The Portfolio is open once a quarter, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ■ The Portfolio is valued on the last business day of the calendar quarter. ■ The Administrator must have advance written notification of Member contributions or redemptions 90 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
■ Invests in real estate properties diversified by type and location. ■ Outperform the NFI ODCE Net index on an annual basis.		FYTD	1 Year
	Beginning Market Value	162,937	162,648
	Net Additions	-20,380	-21,020
	Return on Investment	4,261	5,192
	Ending Market Value	146,819	146,819

FMIvT Core Real Estate Portfolio

For the Periods Ending June 30, 2025

Account Description

- **Strategy** Core Real Estate
- **Vehicle** Non-Mutual Commingled
- **Benchmark** NFI ODCE Net
- **Performance Inception Date** April 2018

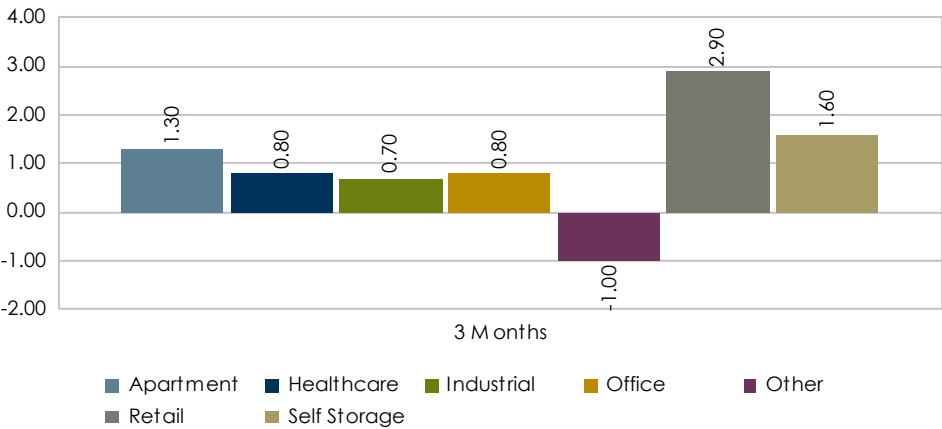
Fund Information

■ Gross Market Value	\$41,339,000,000
■ Net Market Value	\$30,460,000,000
■ Cash Balance of Fund	\$30,460,000
■ # of Properties	517
■ # of Participants	481

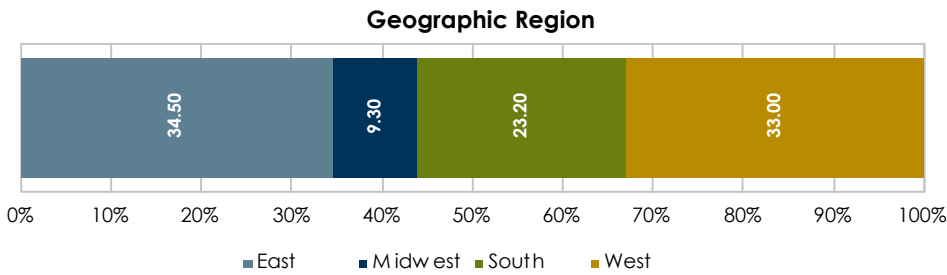
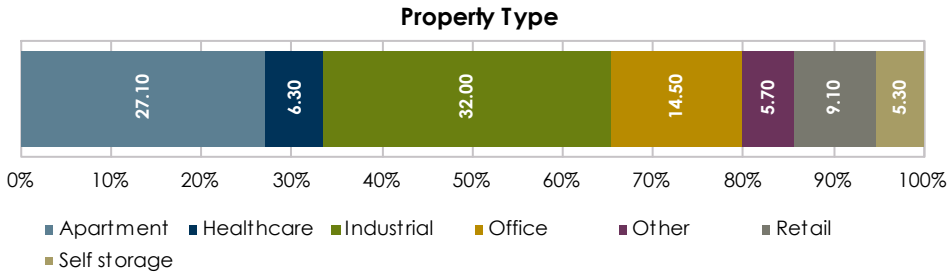
Performance Goals

- Invests in real estate properties diversified by type and location.
- Outperform the NFI ODCE Net index on an annual basis.

Returns by Property Type (%)



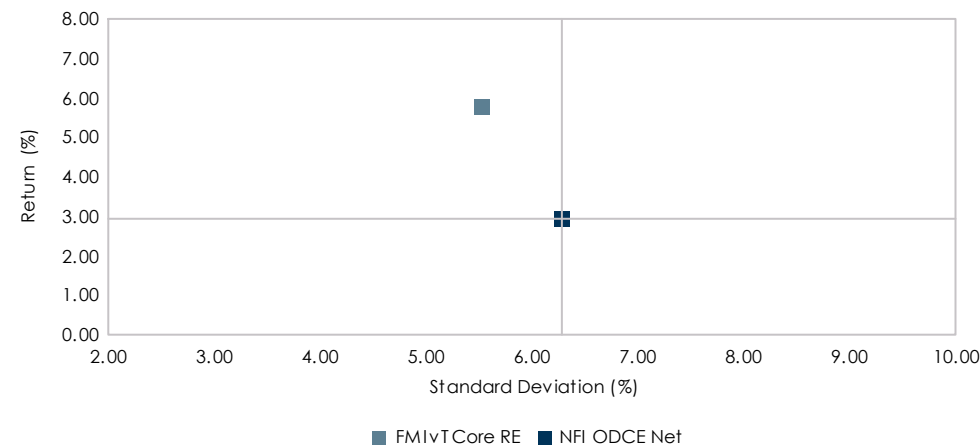
Allocations



FMIvT Core Real Estate Portfolio

For the Periods Ending June 30, 2025

Risk / Return Since Apr 2018



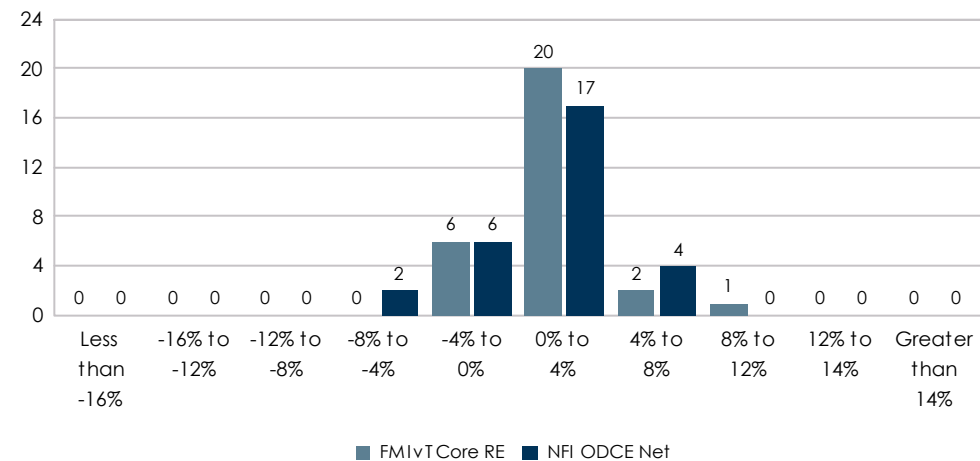
Portfolio Statistics Since Apr 2018

	FMIvT Core RE	NFI ODCE Net
Return (%)	5.79	2.93
Standard Deviation (%)	5.52	6.27
Sharpe Ratio	0.59	0.07

Benchmark Relative Statistics

Beta	0.84
R Squared (%)	91.50
Alpha (%)	0.80
Tracking Error (%)	1.89
Batting Average (%)	79.31
Up Capture (%)	116.31
Down Capture (%)	47.81

Return Histogram Since Apr 2018

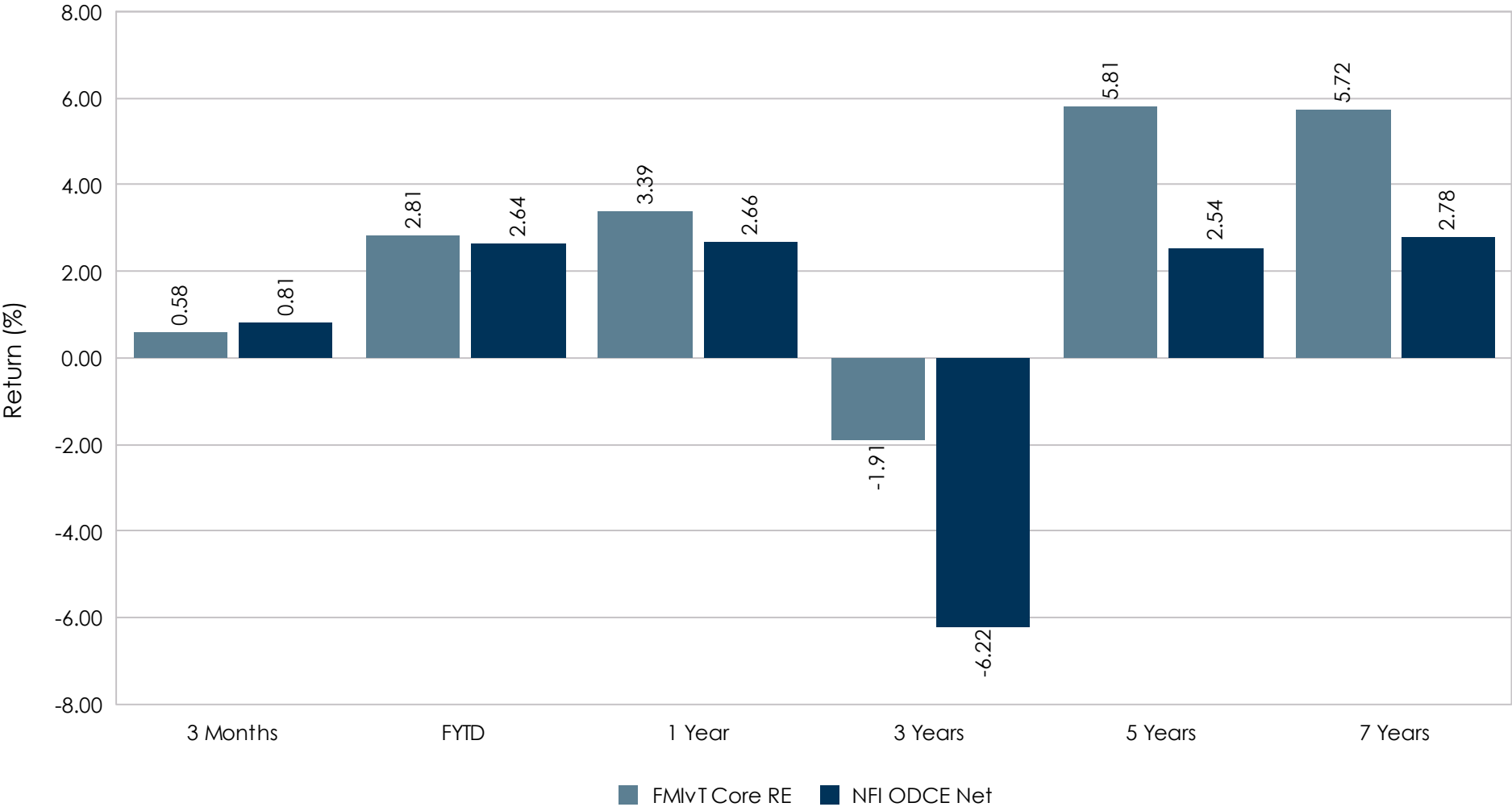


Return Analysis Since Apr 2018

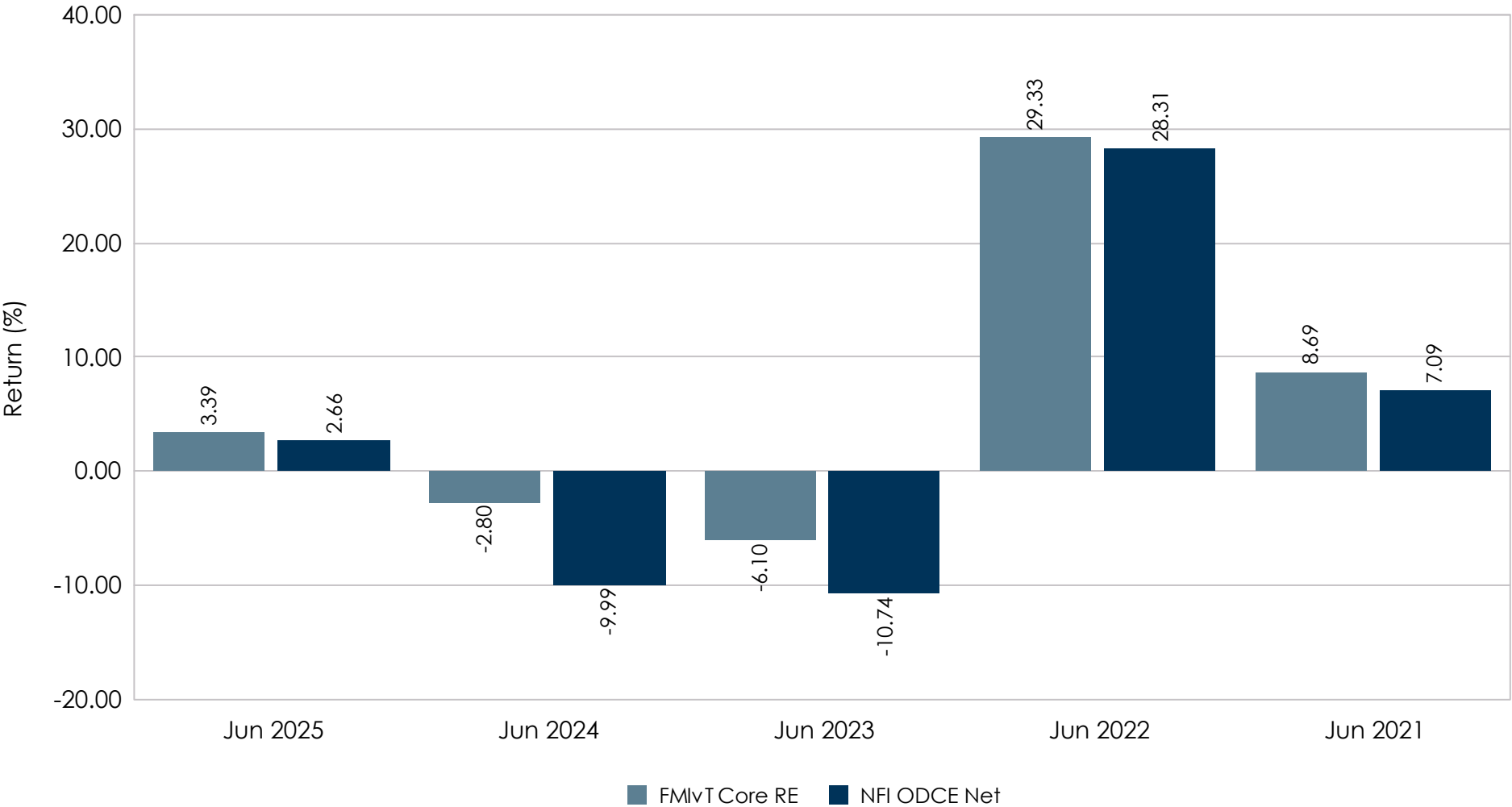
	FMIvT Core RE	NFI ODCE Net
Number of Quarters	29	29
Highest Quarterly Return (%)	9.83	7.66
Lowest Quarterly Return (%)	-3.48	-5.17
Number of Positive Quarters	23	21
Number of Negative Quarters	6	8
% of Positive Quarters	79.31	72.41

FMIvT Core Real Estate Portfolio

For the Periods Ending June 30, 2025



FMIvT Core Real Estate Portfolio
For the One Year Periods Ending June



Plan Information for Quarter Ending

June 30, 2025



Wauchula General

Beginning Balance	\$24,663,881.86	Cash	\$1,176,052.10	4.5%
Contributions	\$199,629.50	Broad Market HQ Bond Fund	\$3,658,828.75	14.0%
Earnings	\$1,603,339.54	Core Plus Fixed Income	\$3,632,694.25	13.9%
Distributions	(\$308,250.14)	Diversified Large Cap	\$6,350,681.32	24.3%
Expenses	(\$24,109.72)	Diversified Small to Mid Cap	\$3,266,811.38	12.5%
Other	\$0.00	International Equity	\$5,880,260.48	22.5%
Ending Balance	<u>\$26,134,491.04</u>	Core Real Estate	\$2,169,162.76	8.3%

301 S. Bronough Street
P.O. Box 1757
Tallahassee, FL 32302
(800) 342 - 8112

Wauchula General

Plan Account Statement for 04/01/2025 to 06/30/2025

Beginning Balance	Contributions	Earnings/(Losses)	Distributions	Fees / Req. / Exp.	Other	Ending Balance
\$24,663,881.86	\$199,629.50	\$1,603,339.54	(\$308,250.14)	(\$24,109.72)	\$0.00	\$26,134,491.04

Transaction Detail

Contributions

Contribution Detail							Rollover Detail					
<u>Date</u>	<u>Payroll</u> <u>Ending</u>	<u>Employer</u>	<u>EE Pre-Tax</u>	<u>EE After-</u> <u>Tax</u>	<u>State Excise</u>	<u>Subtotal</u>	<u>Date</u>	<u>Participant</u>	<u>EE Pre-</u> <u>Tax</u> <u>Rollover</u>	<u>EE After</u> <u>Tax</u> <u>Rollover</u>	<u>Total</u>	
04/04/2025	03/28/2025	\$0.00	\$14,738.11	\$0.00	\$0.00	\$14,738.11	Total				\$0.00	
04/04/2025	03/28/2025	\$16,447.70	\$0.00	\$0.00	\$0.00	\$16,447.70						
04/17/2025	04/11/2025	\$0.00	\$15,020.15	\$0.00	\$0.00	\$15,020.15						
04/17/2025	04/11/2025	\$16,762.44	\$0.00	\$0.00	\$0.00	\$16,762.44						
04/22/2025	04/17/2025	\$0.00	\$58.05	\$0.00	\$0.00	\$58.05						
04/22/2025	04/17/2025	\$64.80	\$0.00	\$0.00	\$0.00	\$64.80						
05/06/2025	04/25/2025	\$0.00	\$15,695.04	\$0.00	\$0.00	\$15,695.04						
05/06/2025	04/25/2025	\$12,383.35	\$0.00	\$0.00	\$0.00	\$12,383.35						
05/19/2025	05/09/2025	\$0.00	\$15,420.50	\$0.00	\$0.00	\$15,420.50						
05/19/2025	05/09/2025	\$12,166.78	\$0.00	\$0.00	\$0.00	\$12,166.78						
06/02/2025	05/23/2025	\$0.00	\$14,948.95	\$0.00	\$0.00	\$14,948.95						
06/02/2025	05/23/2025	\$11,794.67	\$0.00	\$0.00	\$0.00	\$11,794.67						
06/16/2025	06/06/2025	\$0.00	\$15,385.34	\$0.00	\$0.00	\$15,385.34						
06/16/2025	06/06/2025	\$12,139.01	\$0.00	\$0.00	\$0.00	\$12,139.01						
06/26/2025	06/20/2025	\$0.00	\$14,871.22	\$0.00	\$0.00	\$14,871.22						
06/26/2025	06/20/2025	\$11,733.39	\$0.00	\$0.00	\$0.00	\$11,733.39						
Total						\$199,629.50						

Fees, Requisitions and Expenses

Date	Req. Num	Description	Amount
04/01/2025	R-2025-Qtrly2-065	VENDOR: FMPTF/ DETAIL: 03/31/2025 Quarterly Fees	(\$10,234.72)
04/30/2025	R-2025-04-00351	VENDOR: FMPTF/ DETAIL: Invoice Number 316-0425, Actuarial valuation and individual benefit statements as of October 1, 2024.	(\$13,875.00)
Total			(\$24,109.72)

Other

Date	Description	Amount
Total		\$0.00

Earnings / (Losses)

Date	Amount
04/30/2025	\$144,649.47
05/31/2025	\$734,876.77
06/30/2025	\$723,813.30
Total	\$1,603,339.54

Distributions

Lump Sum Detail				Recurring Payment Detail		
Date	Participant	Type	Amount	Date	Participant	Amount

301 S. Bronough Street
P.O. Box 1757
Tallahassee, FL 32302
(800) 342 - 8112

Wauchula General

Plan Account Statement for 04/01/2025 to 06/30/2025

05/09/2025	Brandon Ball	Lump Sum	(\$27,171.26)	04/01/2025	Aguilar , Jeannie	(\$2,220.06)
05/09/2025	Joshua Eason	Lump Sum	(\$8,637.04)	04/01/2025	Allen, Stanley	(\$1,097.14)
06/20/2025	Anthony King	Lump Sum	(\$392.28)	04/01/2025	Atchley, Terry	(\$3,720.78)
06/06/2025	Mary Norwood	Lump Sum	(\$25,000.00)	04/01/2025	Beattie , Maria	(\$673.50)
Total			(\$61,200.58)	04/01/2025	Braddock, James A.	(\$2,324.54)
				04/01/2025	Brown, Mavis	(\$100.00)
				04/01/2025	Brown, Randall	(\$1,321.77)
				04/01/2025	Burton , Jean	(\$112.95)
				04/01/2025	Carlton, Freddie	(\$778.26)
				04/01/2025	Chestnut, Sandra L.	(\$2,179.33)
				04/01/2025	Cogburn, Shirley	(\$100.00)
				04/01/2025	Conerly, Jerry	(\$100.00)
				04/01/2025	Dulanski Jr, John C	(\$918.65)
				04/01/2025	Dupree, Suzanne	(\$100.00)
				04/01/2025	Ehrenkauffer, Domitila	(\$8,965.11)
				04/01/2025	Ellis, Donnie	(\$1,701.88)
				04/01/2025	Flippin, Michael	(\$617.95)
				04/01/2025	Gibbs, Susan K.	(\$1,647.76)
				04/01/2025	Gibney, John	(\$1,250.16)
				04/01/2025	Grimes, Fayree	(\$100.00)
				04/01/2025	Ham, Mathew	(\$621.33)
				04/01/2025	Harris, Thomas R.	(\$2,832.80)
				04/01/2025	Harsh, Victoria L.	(\$2,193.39)
				04/01/2025	Hartley, James	(\$1,819.05)
				04/01/2025	Heine, Michael	(\$4,876.43)
				04/01/2025	Johnson, Billy	(\$1,715.41)
				04/01/2025	Kilpatrick, Donald	(\$1,768.46)
				04/01/2025	Lake, Dennis	(\$2,613.00)
				04/01/2025	Limoges, Kyle	(\$728.68)
				04/01/2025	Maddox, Andrew	(\$5,086.29)
				04/01/2025	McClellan , Beverly Smith	(\$2,773.02)
				04/01/2025	Minear, James	(\$1,749.58)
				04/01/2025	Morris, Alfred	(\$3,622.32)
				04/01/2025	Morris, Robert W.	(\$4,955.53)
				04/01/2025	Norwood, Charles	(\$100.00)
				04/01/2025	Osteen, Claude	(\$3,700.85)
				04/01/2025	Osteen, Kenneth	(\$3,100.14)
				04/01/2025	Outley , Bessie	(\$1,654.49)
				04/01/2025	Pearson, Conrad	(\$733.92)
				04/01/2025	Pearson, Tammy	(\$1,036.14)
				04/01/2025	Quackenbush, Bernard	(\$883.18)
				04/01/2025	Russell , Mary Sue	(\$934.86)
				04/01/2025	Snyder, Virginia	(\$2,368.45)
				04/01/2025	Stanford, Margie	(\$672.30)
				04/01/2025	Svendsen, Theresa A	(\$2,795.22)
				04/01/2025	Willis, Mark A.	(\$1,003.00)
				05/01/2025	Aguilar , Jeannie	(\$2,220.06)
				05/01/2025	Allen, Stanley	(\$1,097.14)
				05/01/2025	Atchley, Terry	(\$3,720.78)
				05/01/2025	Beattie , Maria	(\$673.50)
				05/01/2025	Braddock, James A.	(\$2,324.54)
				05/01/2025	Brown, Mavis	(\$100.00)
				05/01/2025	Brown, Randall	(\$1,321.77)
				05/01/2025	Burton , Jean	

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Wauchula General

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05/01/2025	Carlton, Freddie	(\$778.26)
05/01/2025	Chestnut, Sandra L.	(\$2,179.33)
05/01/2025	Cogburn, Shirley	(\$100.00)
05/01/2025	Conerly, Jerry	(\$100.00)
05/01/2025	Dulanski Jr, John C	(\$918.65)
05/01/2025	Dupree, Suzanne	(\$100.00)
05/01/2025	Ehrenkaufner, Domitila	(\$2,988.37)
05/01/2025	Ellis, Donnie	(\$1,701.88)
05/01/2025	Flippin, Michael	(\$617.95)
05/01/2025	Gibbs, Susan K.	(\$1,647.76)
05/01/2025	Gibney, John	(\$1,250.16)
05/01/2025	Grimes, Fayree	(\$100.00)
05/01/2025	Ham, Mathew	(\$621.33)
05/01/2025	Harris, Thomas R.	(\$2,832.80)
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05/01/2025	Limoges, Kyle	(\$728.68)
05/01/2025	Maddox, Andrew	(\$5,086.29)
05/01/2025	McClellan , Beverly Smith	(\$2,773.02)
05/01/2025	Minear, James	(\$1,749.58)
05/01/2025	Morris, Alfred	(\$3,622.32)
05/01/2025	Morris, Robert W.	(\$4,955.53)
05/01/2025	Norwood, Charles	(\$100.00)
05/01/2025	Osteen, Claude	(\$3,700.85)
05/01/2025	Osteen, Kenneth	(\$3,100.14)
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05/01/2025	Stanford, Margie	(\$672.30)
05/01/2025	Svendsen, Theresa A	(\$2,795.22)
05/01/2025	Willis, Mark A.	(\$1,003.00)
06/01/2025	Aguilar , Jeannie	(\$2,220.06)
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06/01/2025	Atchley, Terry	(\$3,720.78)
06/01/2025	Beattie , Maria	(\$673.50)
06/01/2025	Braddock, James A.	(\$2,324.54)
06/01/2025	Brown, Mavis	(\$100.00)
06/01/2025	Brown, Randall	(\$1,321.77)
06/01/2025	Burton , Jean	(\$112.95)
06/01/2025	Carlton, Freddie	(\$778.26)
06/01/2025	Chestnut, Sandra L.	(\$2,179.33)
06/01/2025	Cogburn, Shirley	(\$100.00)
06/01/2025	Conerly, Jerry	(\$100.00)
06/01/2025	Dulanski Jr, John C	(\$918.65)
06/01/2025	Dupree, Suzanne	(\$100.00)
06/01/2025	Ehrenkaufner, Domitila	(\$2,988.37)
06/01/2025	Ellis, Donnie	(\$1,701.88)

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06/01/2025	Grimes, Fayree	(\$100.00)
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06/01/2025	Pearson, Tammy	(\$1,036.14)
06/01/2025	Quackenbush, Bernard	(\$883.18)
06/01/2025	Russell , Mary Sue	(\$934.86)
06/01/2025	Snyder, Virginia	(\$2,368.45)
06/01/2025	Stanford, Margie	(\$672.30)
06/01/2025	Svendsen, Theresa A	(\$2,795.22)
06/01/2025	Willis, Mark A.	(\$1,003.00)
Total		(\$247,049.56)

Florida Municipal Pension Trust Fund – DB 60% Equity Allocation

Executive Summary

As of June 30, 2025

DB 60% Equity Allocation

- The US Fed held its benchmark rate steady at a range of 4.25% - 4.50%, but a few Fed officials have started to express support for a cut as long as inflation shows minimal response from tariff pressures. The deadline for the 90-day tariff pause looms in July, and while markets seem to have grown accustomed to higher tariffs, a widespread return to “Liberation Day” levels would be an unwelcome development. US equities rebounded in the second quarter as the S&P 500 reached a new all-time high. Non-US equity markets continued their YTD outperformance as a weaker dollar provided a tailwind. Core real estate returns maintained momentum with a 4th consecutive quarter of positive returns. However, the return is comprised almost entirely of income as price appreciation remains flat. The 60% Equity Allocation slightly trailed the Target Index in the second quarter, up 6.5% versus up 6.9%.
- This allocation has earned an 10.9% return over the past year, and has outpaced the performance of the Target Index over the past 5 years (up 8.5% vs. up 8.0%).
- Over the past 10 years, this allocation is up 7.1% on average annually. While this performance is slightly behind the target index (up 7.4%) the risk-controlled nature of many of the underlying strategies are designed to provide downside protection should the markets continue to moderate or decline.

FMLvT Broad Market High Quality Bond Fund

- The Broad Market High Quality Bond Fund outpaced the Bloomberg US Aggregate A+ Index in the second quarter (up 1.4% vs up 1.1%), and ranked in the top 31st percentile of its peer group of US core fixed income managers. The Fund has continued to benefit from its exposure to the ABS sector and security selection within the MBS sector. Over the past 3 years, the Fund has achieved over 40 basis points of excess return on average annually relative to the benchmark.
- The portfolio's conservative risk profile and high quality bias are in line with the objectives for this fund. This bias has rewarded investors in the form of a more favorable relative risk-adjusted return comparison over the long-term.

FMLvT Core Plus Fixed Income Fund

- The Core Plus Fixed Income Fund trailed the Bloomberg Multiverse in the second quarter, up 2.8% vs. up 4.6%, as the underweight to non-US markets slowed performance. The fund benefited from an overweight to the belly of the yield curve, notably the 5-year portion. Strong security selection within the Financials and industrial sectors continues to move the Fund forward. The fund has outpaced the benchmark by nearly 100 basis points over the past year and ranks in the top 32nd percentile of its peer group of global unconstrained fixed income managers.
- In the 10 years since inception, the Core Plus Fixed Income Fund has posted absolute returns of 2.5% on average annually, ahead of the benchmark (up 1.4%).

FMLvT Diversified Large Cap Equity Portfolio

- The fund is allocated 60% to the SSgA S&P 500 Fund, and 20% each to the Hotchkis & Wiley Diversified Value Fund and the Atlanta Capital High Quality Growth Fund. This fund provides investors with exposure to core, value, and growth opportunities within the US large cap equity marketplace. The SSgA S&P 500 Fund replaced Intech in the fourth quarter 2023.
- U.S. equities bounced back from the first quarter struggles with the S&P 500 reaching a new all-time high as investors became increasingly optimistic for trade deals. The underweight to the information technology and consumer discretionary sectors, and thus, being underweight to the Magnificent 7, continues to be a headwind as the Diversified Large Cap Equity Portfolio trailed the Russell 1000, up 8.3% vs. up 11.1%.
- The Diversified Large Cap Equity portfolio has achieved a 15.5% return on average annually over the past 5 years.

Florida Municipal Pension Trust Fund – DB 60% Equity Allocation
Executive Summary
As of June 30, 2025

FMIvT Diversified Small to Mid Cap Equity Fund

- The Diversified Small to Mid Cap Equity Fund trailed the benchmark in the second quarter, up 3.6% vs. up 8.6%, as lower quality factors like high beta, high valuation, and companies with negative earnings outperformed. While markets have become more optimistic, economic factors like growing budget deficits, unsettled tariff policy and persistent inflation remain real concerns. Despite the difficulties facing the asset class, the Fund outpaced the benchmark by 160 basis points over the past 5 years.
- This strategy has generated very strong results over the past 10 years, rising 11.9% on average annually compared with 8.4% for the benchmark. Furthermore, the fund ranked in the top 12th percentile of its peer group, with a more modest risk profile and very strong risk-adjusted returns.

FMIvT International Equity Portfolio

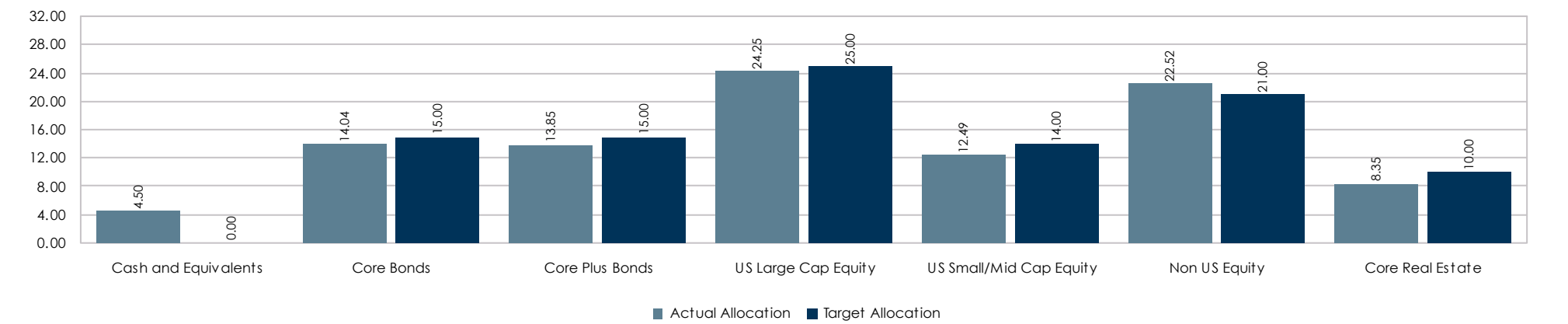
- The FMIvT International Equity Portfolio's momentum continued in the second quarter with the fund rising 15.6% vs. up 12.0% for the MSCI ACWI ex US – Net benchmark, and ranking in the top 19th percentile of its peer group universe. Non-US equity markets outperformed their US counterparts as a weaker dollar provided a tailwind. Stock picking in industrials and IT, as well as in Germany and Switzerland, drove performance the most in the quarter. The fund has outpaced the benchmark by over 330 basis points over the past year (up 21.1% vs. up 17.7%). The portfolio has outperformed the benchmark over all longer term time periods.
- This strategy is intended to provide strong diversification across the broad spectrum of equity markets outside the US, with exposure to both developed and emerging markets.

FMIvT Core Real Estate Portfolio

- In early 2023, a \$50 million redemption was submitted in order to rebalance the portfolio with the proceeds scheduled to be paid out over several quarters. This will reduce the total commitment to \$100 million once all the proceeds are received.
- Core real estate returns maintained momentum with a fourth consecutive quarter of positive returns. However, the return is comprised almost entirely of income as price appreciation remains flat. While rising 3.4% over the trailing one year, the FMIvT Core Real Estate portfolio significantly outperformed the benchmark (up 2.7%). Commercial real estate seems to have stabilized overall even as office vacancy rates remain elevated. A resumption of Fed rate cutting could act as a catalyst for transaction volume and price appreciation.
- The portfolio has outperformed the NFI ODCE Net benchmark over the past 5 years and has achieved nearly 300 basis points of excess return over the benchmark over the past 7 years.

Total Portfolio

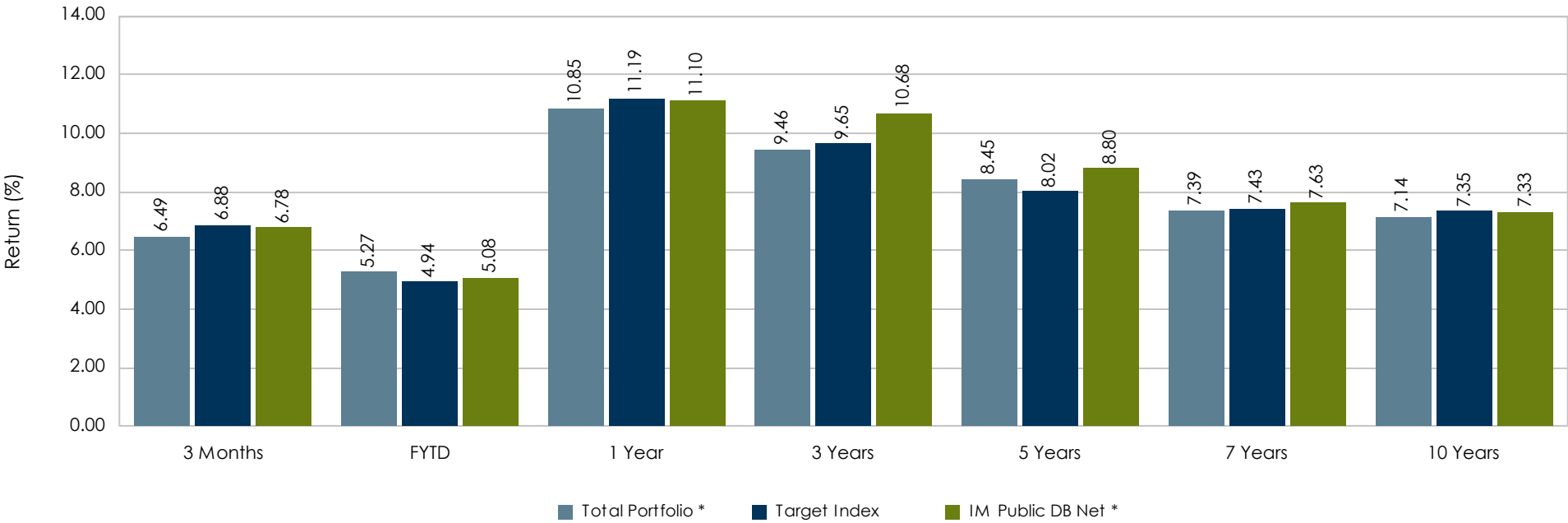
For the Period Ending June 30, 2025



	Market Value (\$000s)	Actual Allocation (%)	Target Allocation (%)	Over/Under Target (%)
Total Portfolio	642,109	100.00	100.00	
Cash and Equivalents	28,888	4.50	0.00	4.50
Fixed Income	179,116	27.89	30.00	-2.11
Core Bonds	90,162	14.04	15.00	-0.96
Core Plus Bonds	88,954	13.85	15.00	-1.15
Equity	380,498	59.26	60.00	-0.74
US Equity	235,924	36.74	39.00	-2.26
US Large Cap Equity	155,730	24.25	25.00	-0.75
US Small/Mid Cap Equity	80,193	12.49	14.00	-1.51
Non US Equity	144,574	22.52	21.00	1.52
Core Real Estate	53,607	8.35	10.00	-1.65

Total Portfolio

For the Periods Ending June 30, 2025

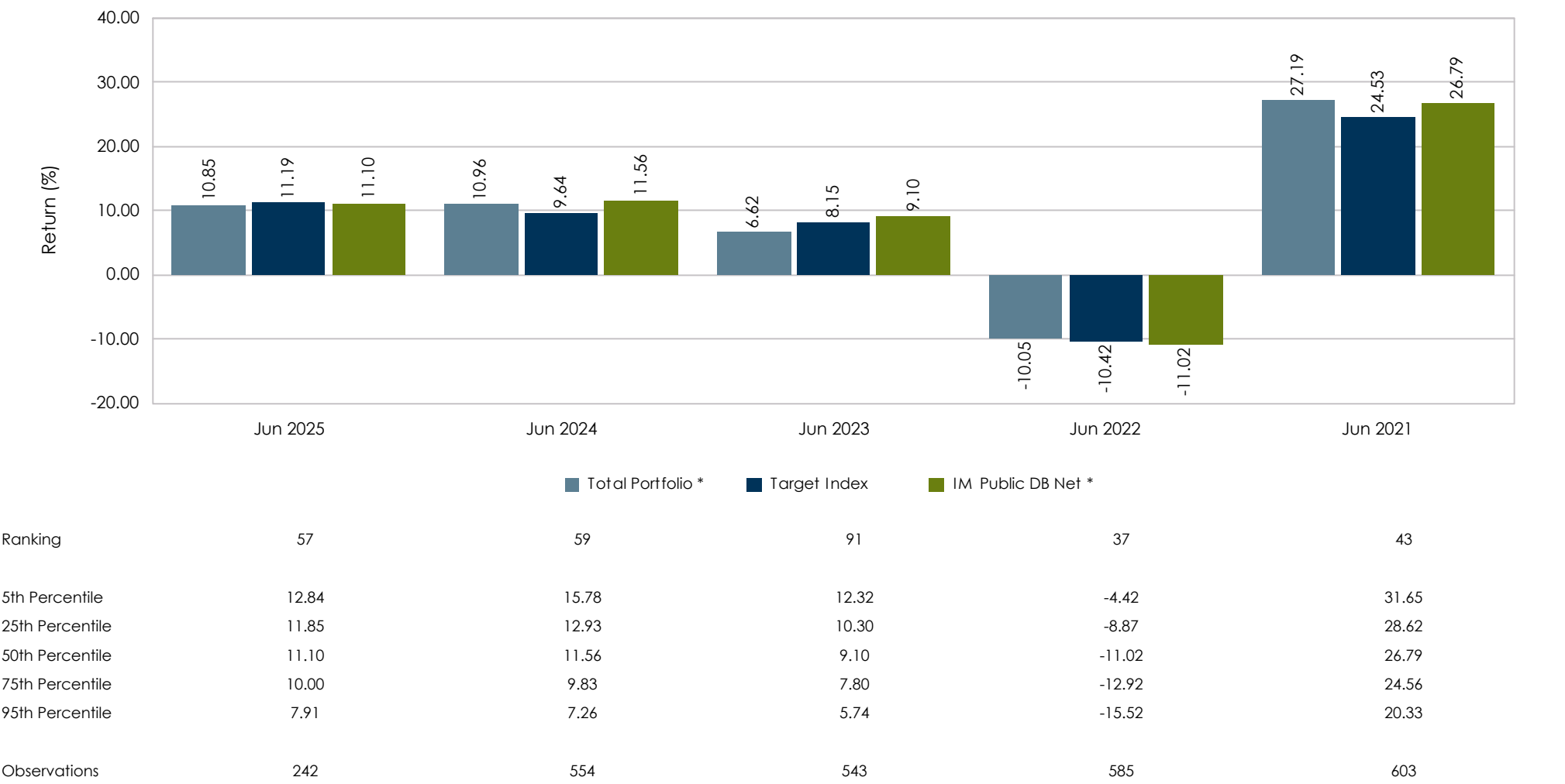


Ranking	60	41	57	74	63	61	61
5th Percentile	8.29	6.86	12.84	12.88	10.57	9.11	8.68
25th Percentile	7.40	5.86	11.85	11.36	9.54	8.20	7.85
50th Percentile	6.78	5.08	11.10	10.68	8.80	7.63	7.33
75th Percentile	5.97	4.29	10.00	9.38	8.08	6.77	6.69
95th Percentile	3.89	2.71	7.91	7.35	6.42	5.75	5.38
Observations	243	242	242	228	217	200	170

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

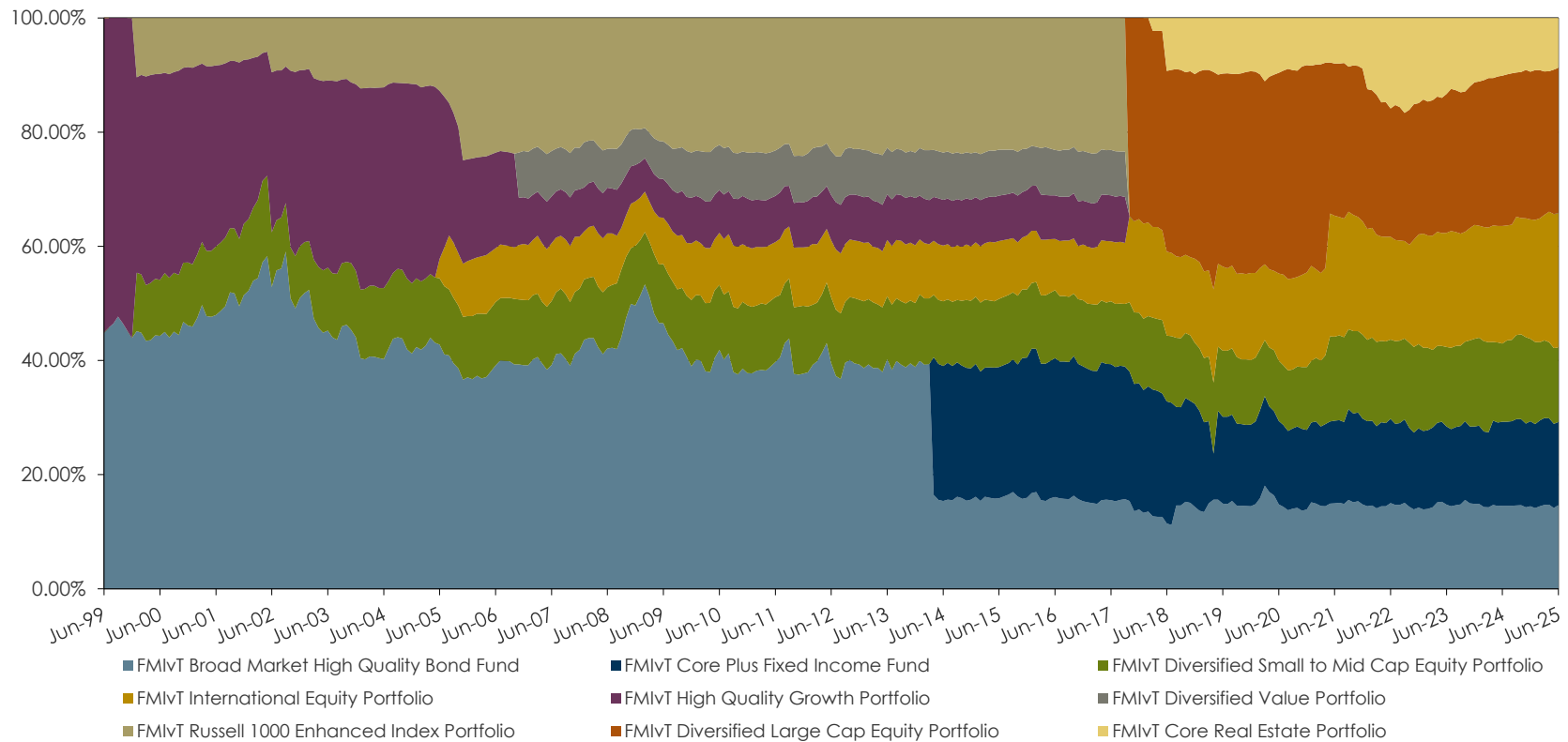
Total Portfolio

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Total Portfolio Historical Manager Allocation



January 1998: Initial allocation to Broad Market HQ Bond and HQ Growth Equity only.

January 2000: Added exposure to Small Cap markets and passive Large Cap.

February 2004: Increased equity portfolio exposure through reduction in the Broad Market HQ Bond Fund.

May 2005: Added International exposure; increased the Large Core allocation to reduce the Fund's growth bias.

November 2006: Added Large Cap Value allocation to balance the style exposure.

April 2014: Added Core Plus Fixed Income.

October 2017: FMIvT Diversified Large Cap Equity Portfolio was created, which combines the large cap core, value, and growth portfolios.

March 2018: Added Core Real Estate Portfolio.

Performance vs. Objectives

For the Periods Ending June 30, 2025

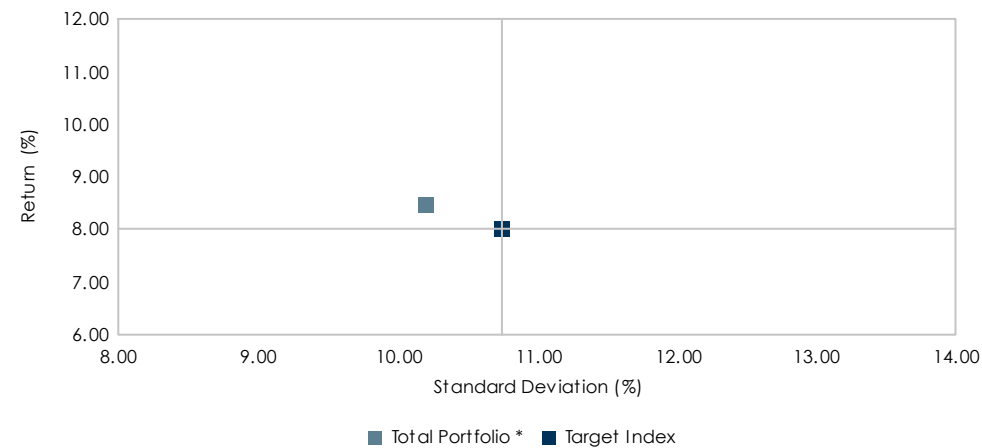
	Benchmark (%)	Rank	Total Portfolio (%)	Rank	Objective Met?	Benchmark (%)	Rank	Total Portfolio (%)	Rank	Objective Met?
	5 Years					10 Years				
■ The Total Portfolio's annualized total return should exceed the total return of the Target Index.	8.02		8.45 *		Yes	7.35		7.14 *		No
■ The Total Portfolio's annualized total return should rank at median or above when compared to the IM Public DB Net universe.	8.80 *	50th	8.45 *	63rd	No	7.33 *	50th	7.14 *	61st	No

Performance and Statistics are calculated using monthly return data. * Indicates net of fee data.
Target Index: Effective April 2021, the index consists of 30.00% Bloomberg US Aggregate, 25.00% S&P 500, 14.00% Russell 2500, 21.00% MSCI ACWI ex US NetDiv, 10.00% NFI ODCE Net.
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Total Portfolio

For the Periods Ending June 30, 2025

5 Year Risk / Return



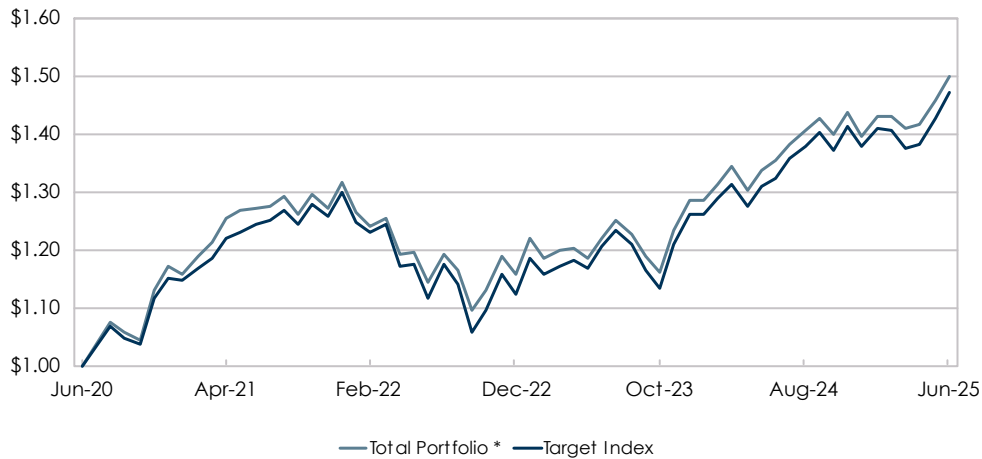
5 Year Portfolio Statistics

	Total Portfolio *	Target Index
Return (%)	8.45	8.02
Standard Deviation (%)	10.20	10.74
Sharpe Ratio	0.55	0.48

Benchmark Relative Statistics

Beta	0.94
Up Capture (%)	97.60
Down Capture (%)	94.18

5 Year Growth of a Dollar



5 Year Return Analysis

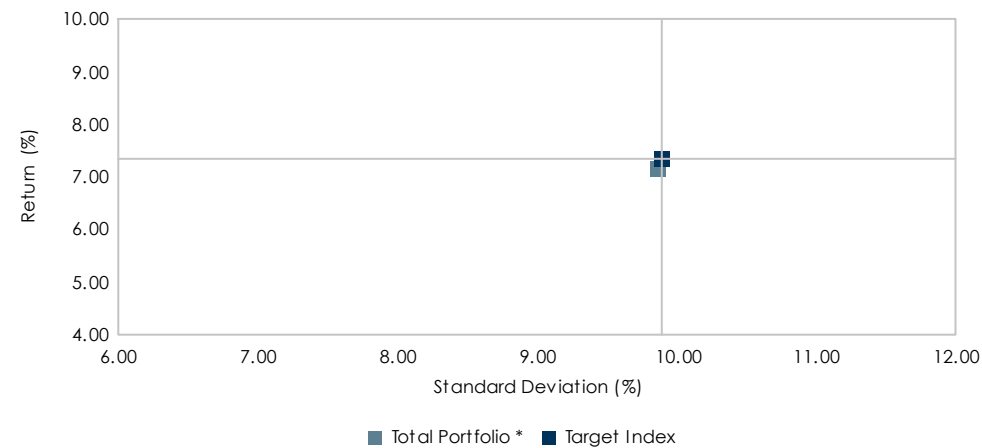
	Total Portfolio *	Target Index
Number of Months	60	60
Highest Monthly Return (%)	8.19	7.83
Lowest Monthly Return (%)	-6.04	-7.00
Number of Positive Months	38	37
Number of Negative Months	22	23
% of Positive Months	63.33	61.67

* Performance is calculated using net of fee returns.
Statistics are calculated using monthly return data.
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Total Portfolio

For the Periods Ending June 30, 2025

10 Year Risk / Return



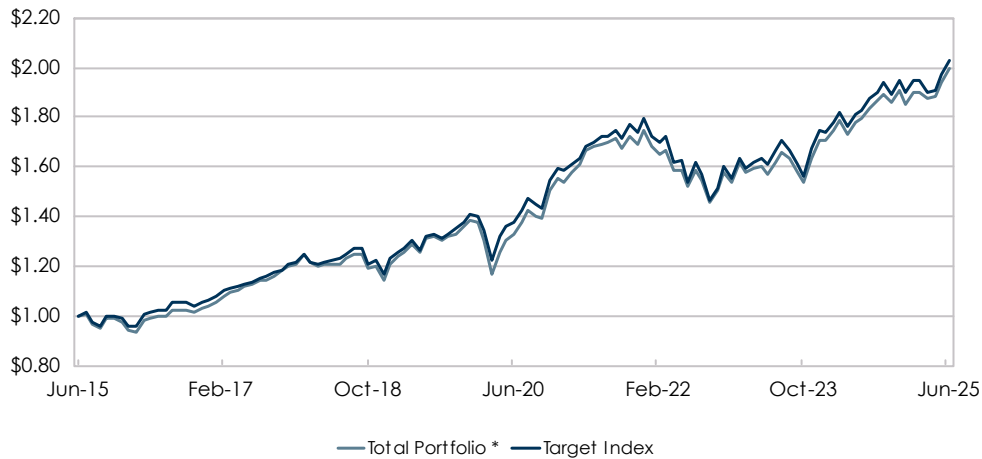
10 Year Portfolio Statistics

	Total Portfolio *	Target Index
Return (%)	7.14	7.35
Standard Deviation (%)	9.87	9.89
Sharpe Ratio	0.53	0.55

Benchmark Relative Statistics

Beta	0.99
Up Capture (%)	98.94
Down Capture (%)	100.22

10 Year Growth of a Dollar



10 Year Return Analysis

	Total Portfolio *	Target Index
Number of Months	120	120
Highest Monthly Return (%)	8.19	7.83
Lowest Monthly Return (%)	-10.21	-8.86
Number of Positive Months	80	83
Number of Negative Months	40	37
% of Positive Months	66.67	69.17

* Performance is calculated using net of fee returns.
Statistics are calculated using monthly return data.
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Rates of Return Summary

For the Periods Ending June 30, 2025

	Market Value (\$000s)	Actual Allocation (%)	3 Months (%)	FYTD (%)	1 Year (%)	3 Years (%)	5 Years (%)	10 Years (%)
Total Portfolio * ¹	642,109	100.00	6.49	5.27	10.85	9.46	8.45	7.14
Target Index ²			6.88	4.94	11.19	9.65	8.02	7.35
Cash and Equivalents	28,888	4.50						
FMPTF Operating	3,966	0.62						
FMPTF Capital City *	24,921	3.88	2.05	7.15	9.03	--	--	--
US T-Bills 90 Day			1.04	3.27	4.68	4.56	2.76	1.98
Fixed Income	179,116	27.89						
Core Bonds								
FMlvt Broad Market High Quality Bond Fund *	90,162	14.04	1.36	1.20	6.28	2.30	-0.70	1.46
Bloomberg US Aggregate A+			1.10	0.76	5.91	2.19	-0.97	1.51
Core Plus Bonds								
FMlvt Core Plus Fixed Income Fund * ³	88,954	13.85	2.71	3.09	9.52	5.41	2.08	1.94
Bloomberg Multiverse			4.55	1.97	9.08	3.10	-0.87	1.36
Equity	380,498	59.26						
US Equity	235,924	36.74						
US Large Cap Equity * ⁴	155,730	24.25	8.22	6.37	12.65	16.57	14.86	11.82
Russell 1000			11.11	9.03	15.66	19.59	16.30	13.35
FMlvt Diversified Large Cap Equity Portfolio *	155,730	24.25	8.21	6.37	12.65	16.58	14.84	--
Russell 1000			11.11	9.03	15.66	19.59	16.30	13.35
US Small/Mid Cap Equity								
FMlvt Diversified SMID Cap Equity Portfolio * ⁵	80,193	12.49	3.42	-4.17	5.75	11.93	12.35	11.24
SMID Benchmark ⁶			8.59	1.06	9.91	11.31	11.44	8.39
Non-US Equity								
FMlvt International Equity Portfolio * ⁷	144,574	22.52	15.46	16.20	20.32	15.36	10.32	6.26
MSCI ACWI ex US NetDiv			12.03	8.94	17.72	13.99	10.13	6.12

FYTD: Fiscal year ending September.

* Net of fee return data.

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Rates of Return Summary

For the Periods Ending June 30, 2025

	Market Value (\$000s)	Actual Allocation (%)	3 Months (%)	FYTD (%)	1 Year (%)	3 Years (%)	5 Years (%)	10 Years (%)
Core Real Estate	53,607	8.35						
FMIvT Core Real Estate Portfolio * ⁸	53,607	8.35	0.25	1.91	2.09	-3.17	4.42	--
<i>NFI ODCE Net</i>			<i>0.81</i>	<i>2.64</i>	<i>2.66</i>	<i>-6.22</i>	<i>2.54</i>	<i>4.42</i>

Notes:

- ¹ Market values and Total Portfolio performance includes all fees and expenses. Beginning July 2008 and ending September 2010, the net of fee performance includes the impact of securities lending activity, which may increase or decrease the total expenses of the portfolio.
- ² Target Index: Effective April 2021, the index consists of 30.00% Bloomberg US Aggregate, 25.00% S&P 500, 14.00% Russell 2500, 21.00% MSCI ACWI ex US NetDiv, 10.00% NFI ODCE Net.
- ³ The performance inception date of the FMIvT Core Plus Fixed Income Fund is 4/1/2014.
- ⁴ Represents the FMPTF Large Cap Equity Composite net of fees returns.
- ⁵ Custom Index consists of the Russell 2500 beginning June 1, 2010 and prior to that the Russell 2000.
- ⁶ SMID Benchmark: Effective June 2010, the index consists of 100.0% Russell 2500.
- ⁷ Allspring EM was added to the portfolio in October 2017. Portfolio renamed and manager changed in October 2014 and April 2011.
- ⁸ The performance inception date of the FMIvT Core Real Estate Portfolio is 4/1/2018.

Florida Municipal Investment Trust
Protecting Florida Investment Act - Quarterly Disclosure
As of June 30, 2025

This Disclosure is intended to provide information with respect to Chapter 175 and 185 Police and Fire Plan's required disclosure of direct or indirect holdings in any "scrutinized companies" as defined in the FSBA PFIA Quarterly Report for Quarter 2 2025.

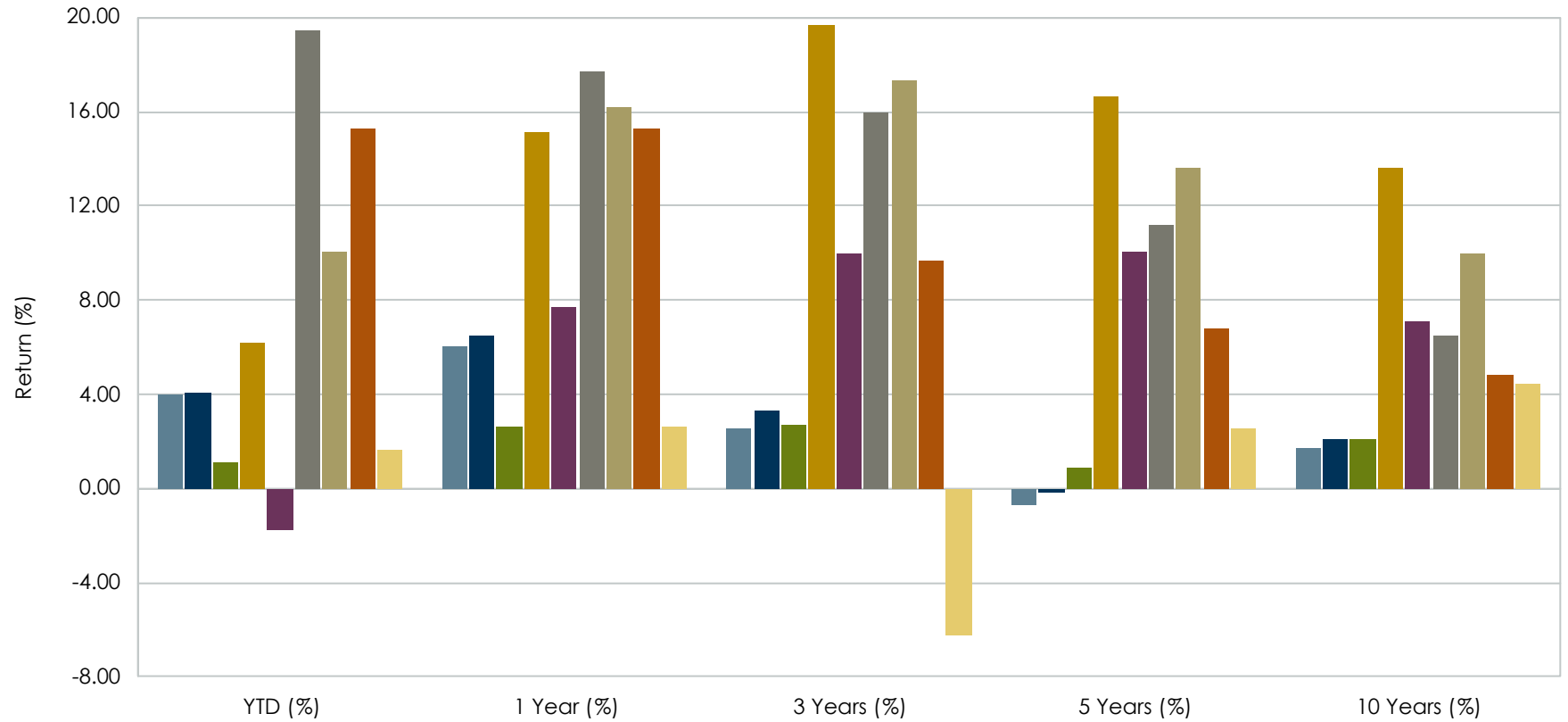
It is important to note that individual Police and Fire Plans have no direct interests in any scrutinized companies. Police and Fire Plans hold an interest in the Florida Municipal Pension Trust Fund. It is also important to note that the Florida Municipal Pension Trust Fund has no direct interests in any scrutinized companies as all of its interests are invested in the Florida Municipal Investment Trust.

The Florida Municipal Investment Trust is the only entity that could possibly have direct interests in any scrutinized companies. ACG has reviewed the **Protecting Florida's Investments Act (PFIA) Quarterly Report-June 10, 2025** that is available on the Florida SBA website. We have reviewed the list of companies appearing in **Tables 1 and 3- Scrutinized Companies with Activities in Sudan and Iran**, and compared these lists to securities of companies held directly by the Florida Municipal Investment Trust. As of 6/30/2025, the Florida Municipal Investment Trust had no direct interest in securities on the above referenced lists.

ACG also requested that investment managers, who manage commingled funds that are owned by the Florida Municipal Investment Trust, review the **Protecting Florida's Investments Act (PFIA) Quarterly Report-June 10, 2025** and disclose whether the Florida Municipal Investment Trust may hold any scrutinized companies indirectly through investment in their respective commingled funds. The FMLvT International Equity Portfolio owns units in the Allspring Emerging Markets Large-Mid Cap Equity Fund. The Allspring Emerging Markets Large-Mid Cap Equity Fund holds **Sberbank of Russia PJSC**, which represents 0.00% of their respective portion of the FMLvT International Equity. All other managers have confirmed that they do not hold any of these securities.

Market Environment

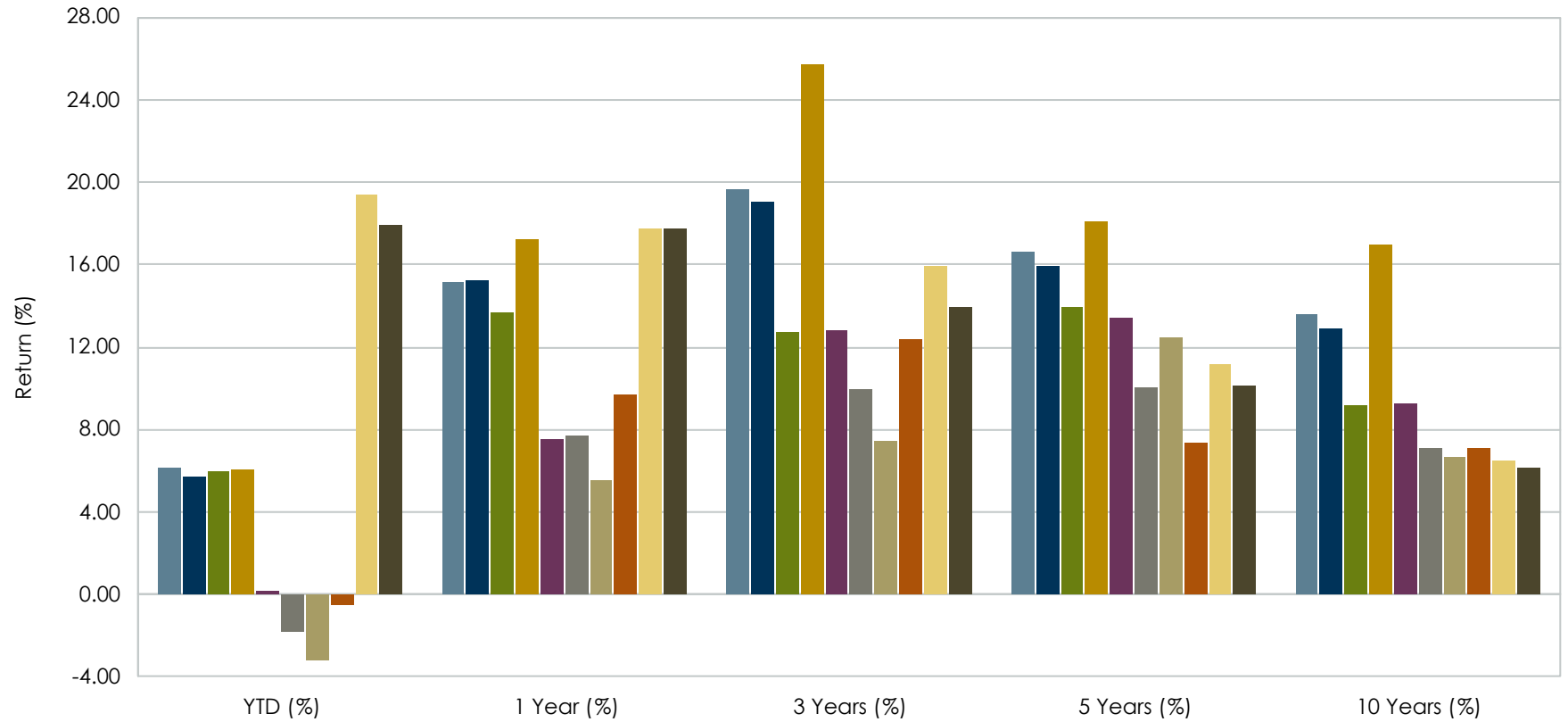
For the Periods Ending June 30, 2025



Bloomberg US Aggregate	4.02	6.08	2.55	-0.73	1.76
Bloomberg Universal	4.10	6.51	3.28	-0.15	2.11
Bloomberg 1-15 Yr Municipal	1.09	2.63	2.70	0.86	2.13
S&P 500	6.20	15.16	19.71	16.64	13.65
Russell 2000	-1.79	7.68	10.00	10.04	7.12
MSCI EAFE NetDiv	19.45	17.73	15.97	11.16	6.51
MSCI ACWI NetDiv	10.05	16.17	17.35	13.65	9.99
MSCI EM NetDiv	15.27	15.29	9.70	6.81	4.81
NFI ODCE Net	1.67	2.66	-6.22	2.54	4.42

Equity Index Returns

For the Periods Ending June 30, 2025

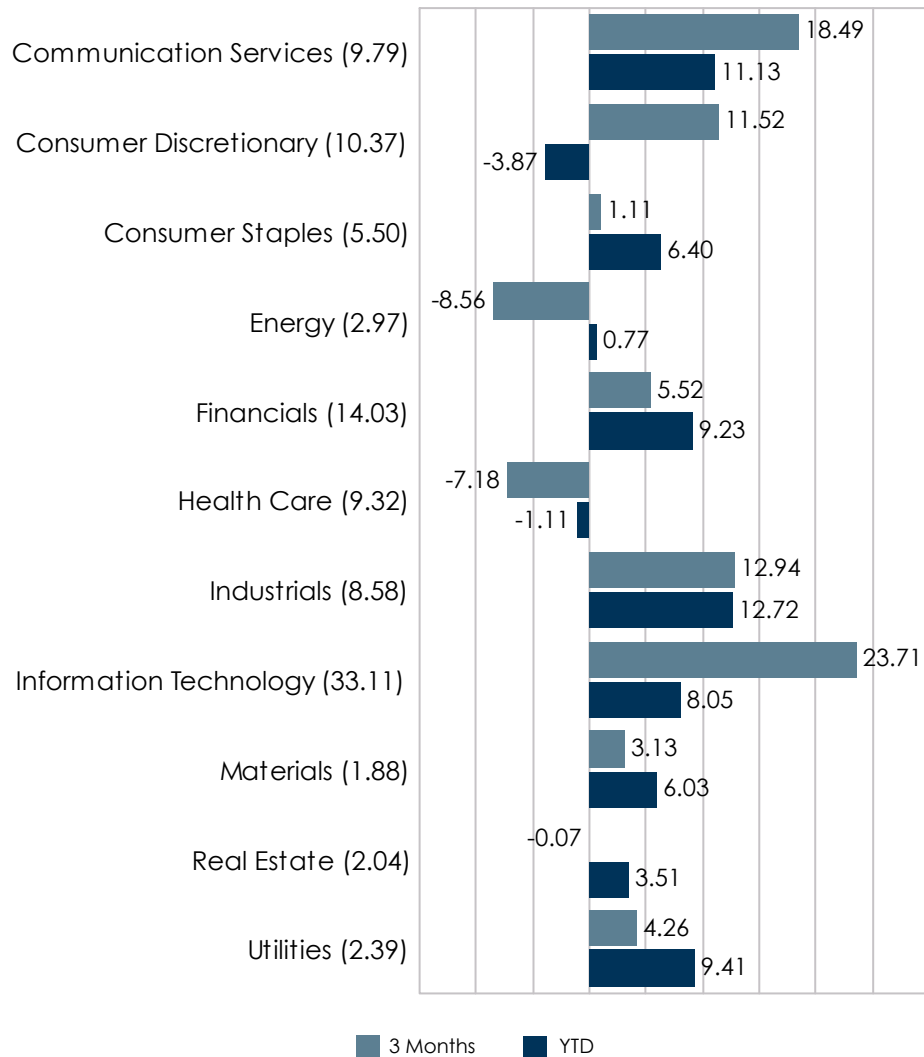


S&P 500	6.20	15.16	19.71	16.64	13.65
Russell 3000	5.75	15.30	19.08	15.96	12.96
Russell 1000 Value	6.00	13.70	12.76	13.93	9.19
Russell 1000 Growth	6.09	17.22	25.76	18.15	17.01
S&P Mid Cap 400	0.20	7.53	12.83	13.44	9.25
Russell 2000	-1.79	7.68	10.00	10.04	7.12
Russell 2000 Value	-3.16	5.54	7.45	12.47	6.72
Russell 2000 Growth	-0.48	9.73	12.38	7.42	7.14
MSCI EAFE NetDiv	19.45	17.73	15.97	11.16	6.51
MSCI ACWI ex US NetDiv	17.90	17.72	13.99	10.13	6.12

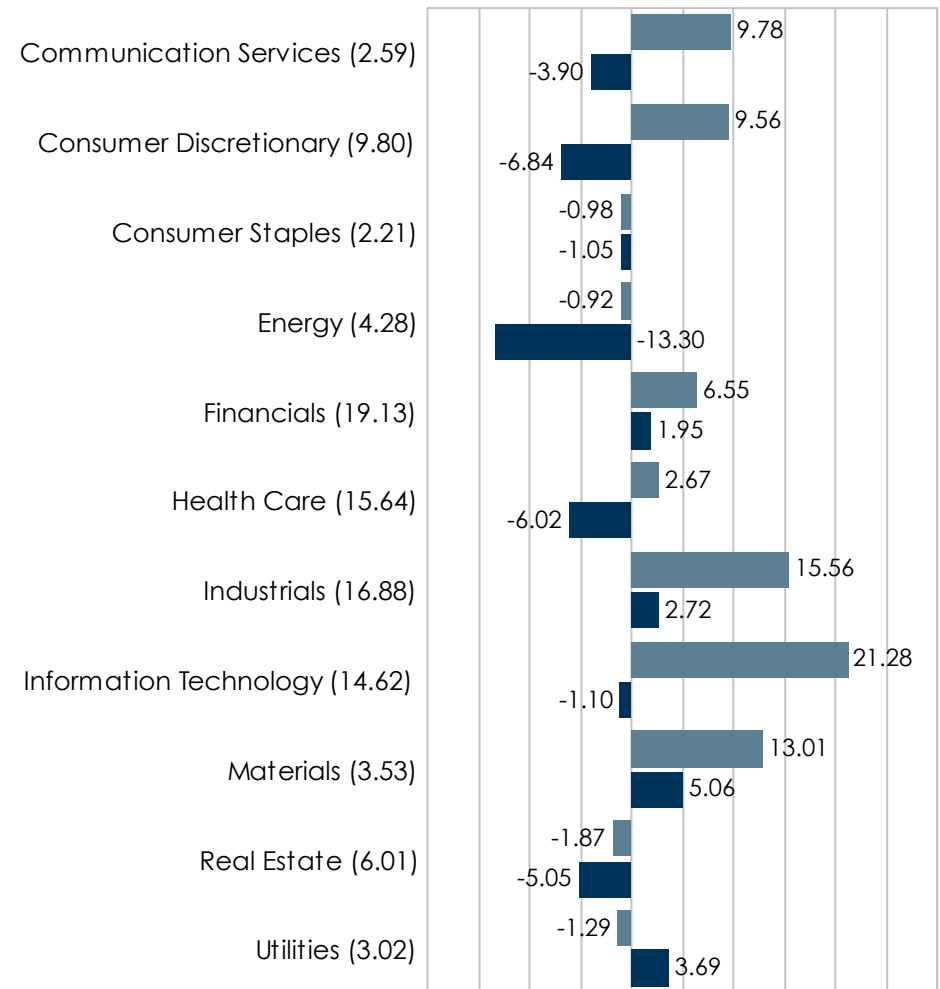
US Markets - Performance Breakdown

For the Periods Ending June 30, 2025

S&P 500 - Sector Returns (%)



Russell 2000 - Sector Returns (%)



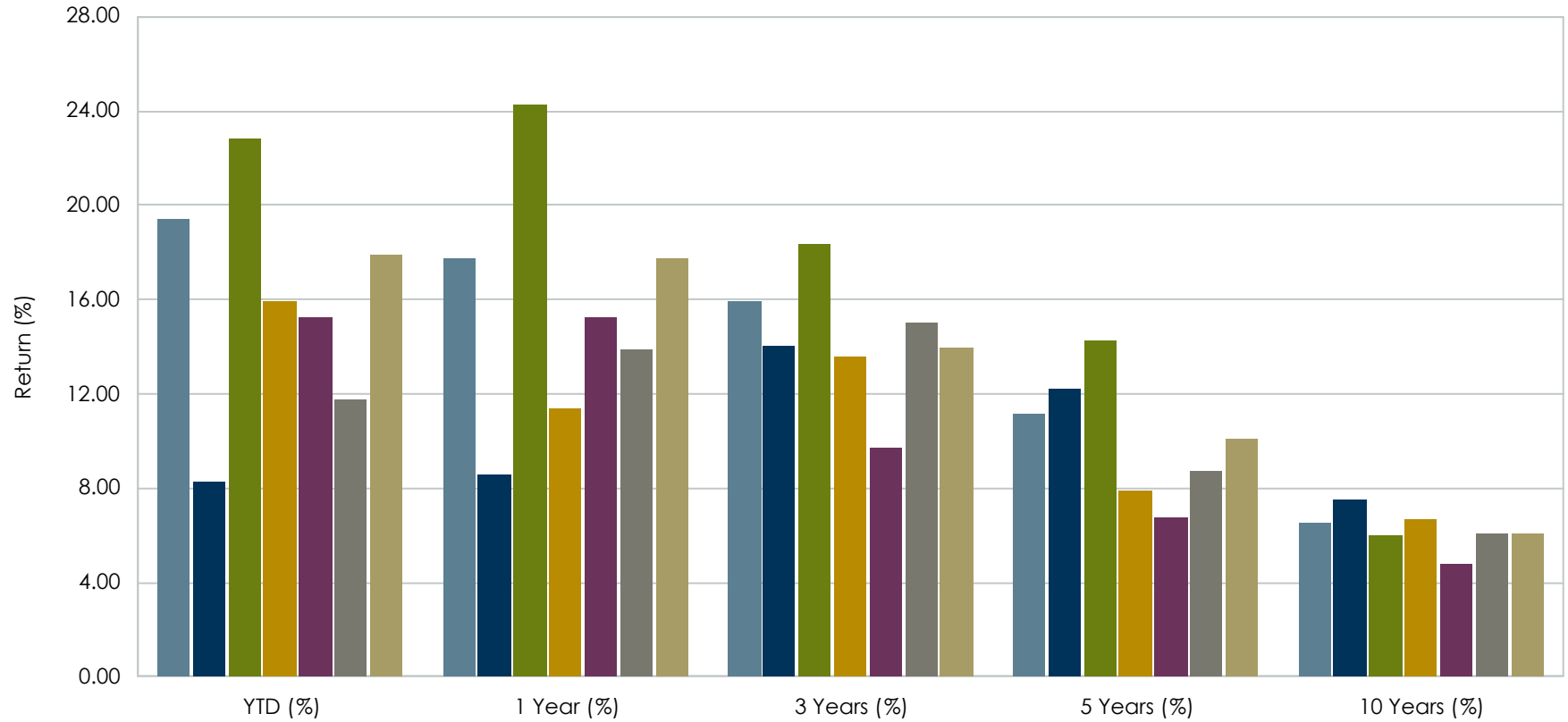
Numbers in parenthesis represent sector weightings of the index. Sector weights may not add to 100% due to rounding or securities that are not assigned to a Global Industry Classification Standard (GICS) sector.

Source: ACG Research, Bloomberg

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Non-US Equity Index Returns

For the Periods Ending June 30, 2025



MSCI EAFE NetDiv	19.45
MSCI EAFE Local Currency	8.26
MSCI EAFE Value NetDiv	22.84
MSCI EAFE Growth NetDiv	15.96
MSCI EM NetDiv	15.27
MSCI Japan NetDiv	11.73
MSCI ACWI ex US NetDiv	17.90

17.73
8.60
24.24
11.39
15.29
13.88
17.72

15.97
14.05
18.38
13.57
9.70
15.03
13.99

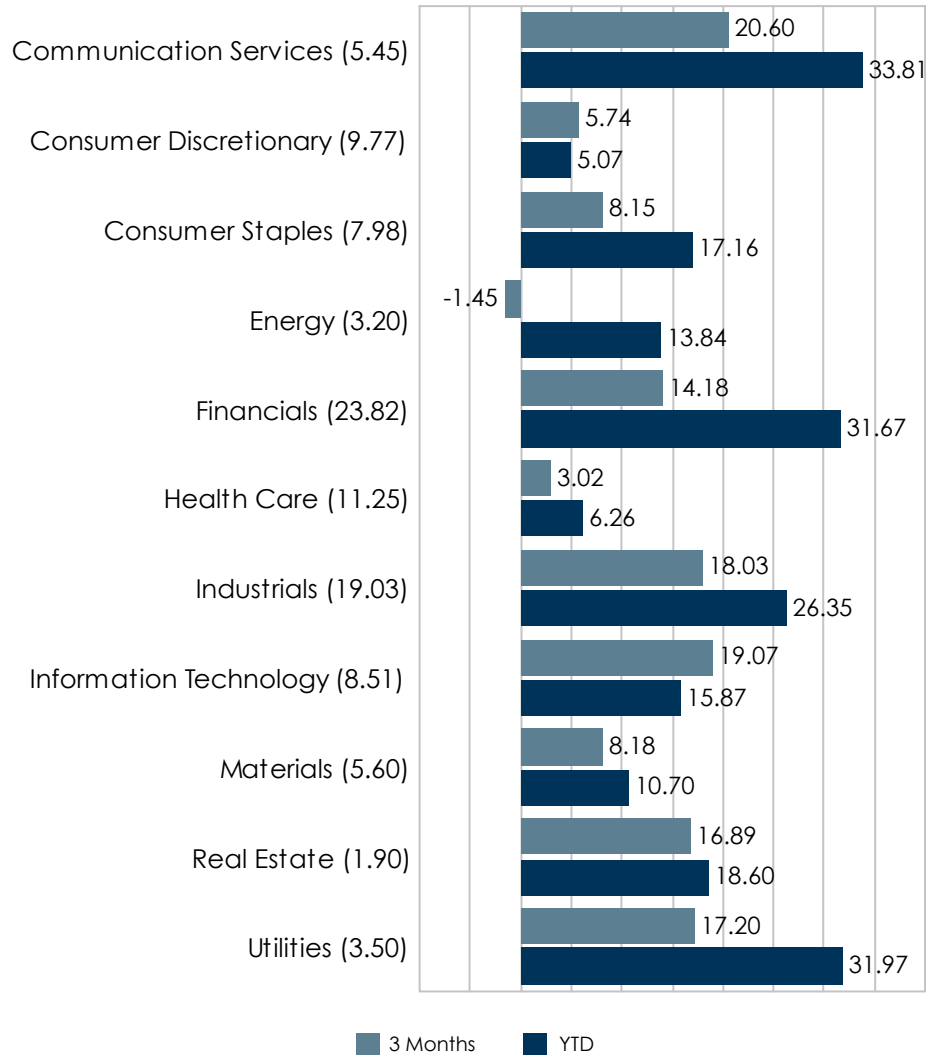
11.16
12.20
14.29
7.90
6.81
8.76
10.13

6.51
7.57
6.05
6.70
4.81
6.07
6.12

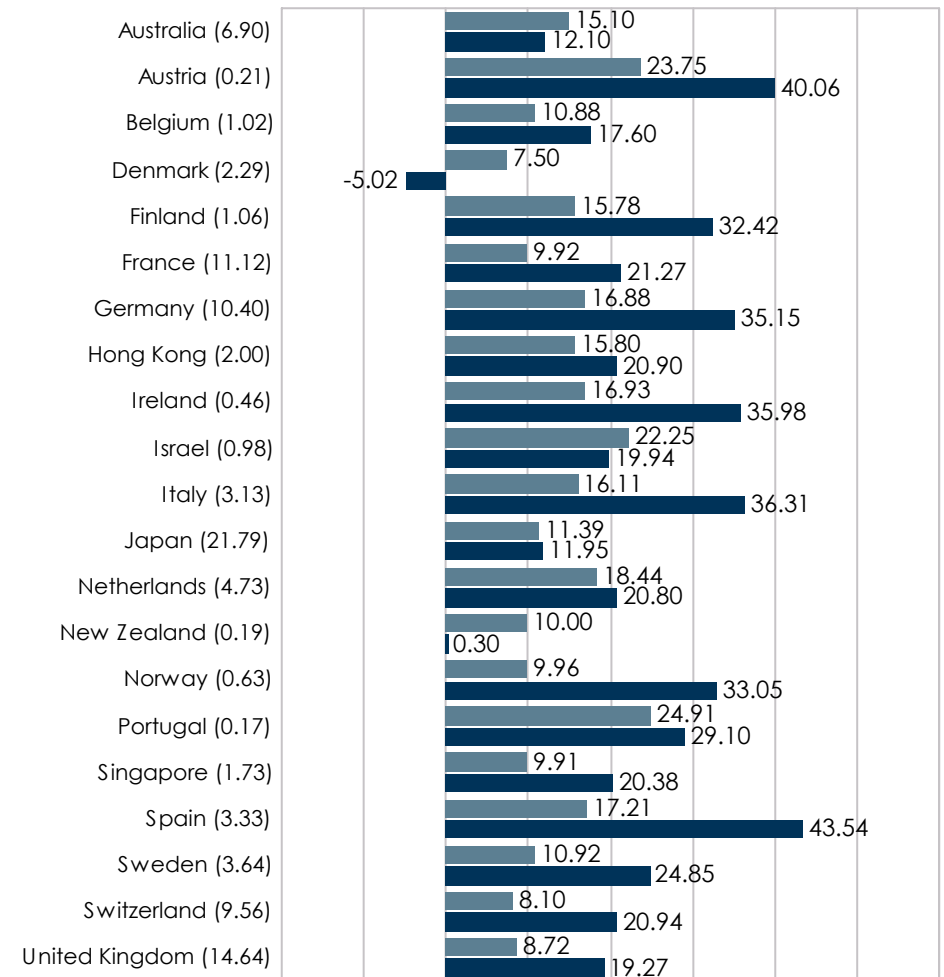
Non-US Equity - Performance Breakdown

For the Periods Ending June 30, 2025

MSCI EAFE - Sector Returns (%)



MSCI EAFE - Country Returns (%)



Numbers in parenthesis represent sector or country weights of the index. Sector or country weights may not add to 100% due to rounding.

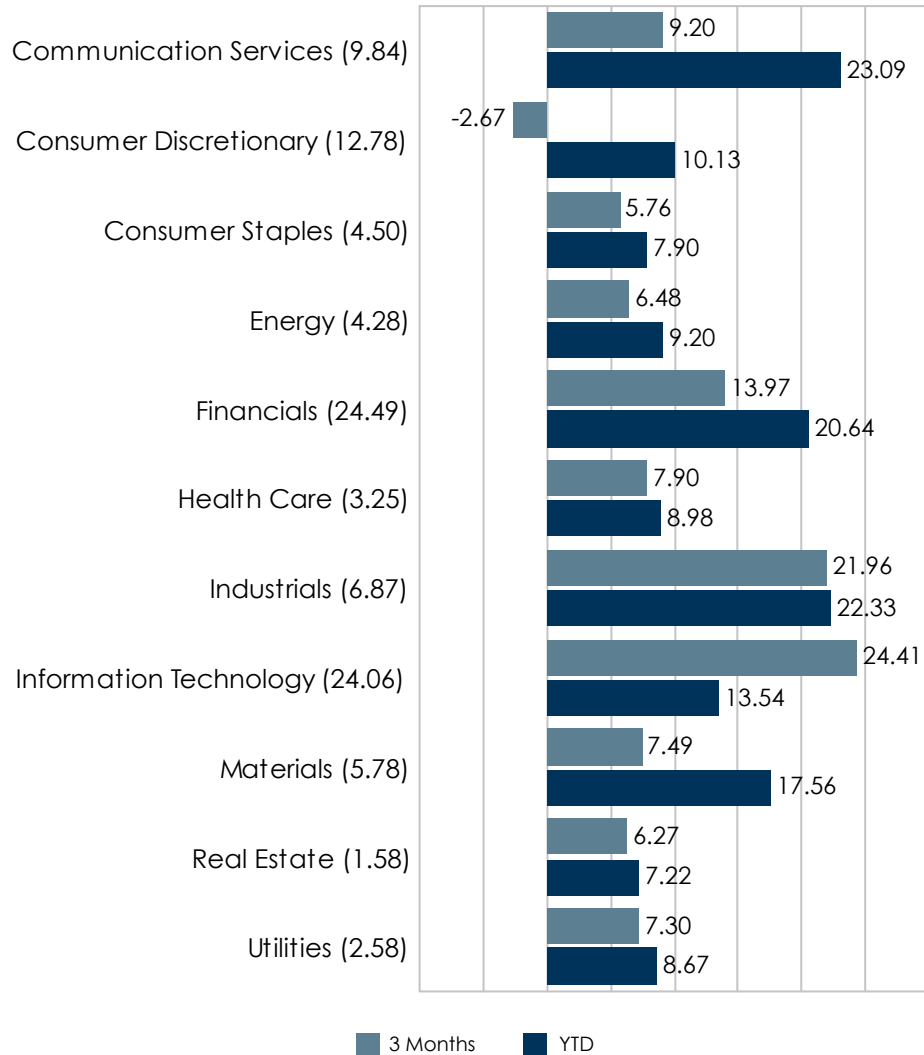
Source: ACG Research, Bloomberg

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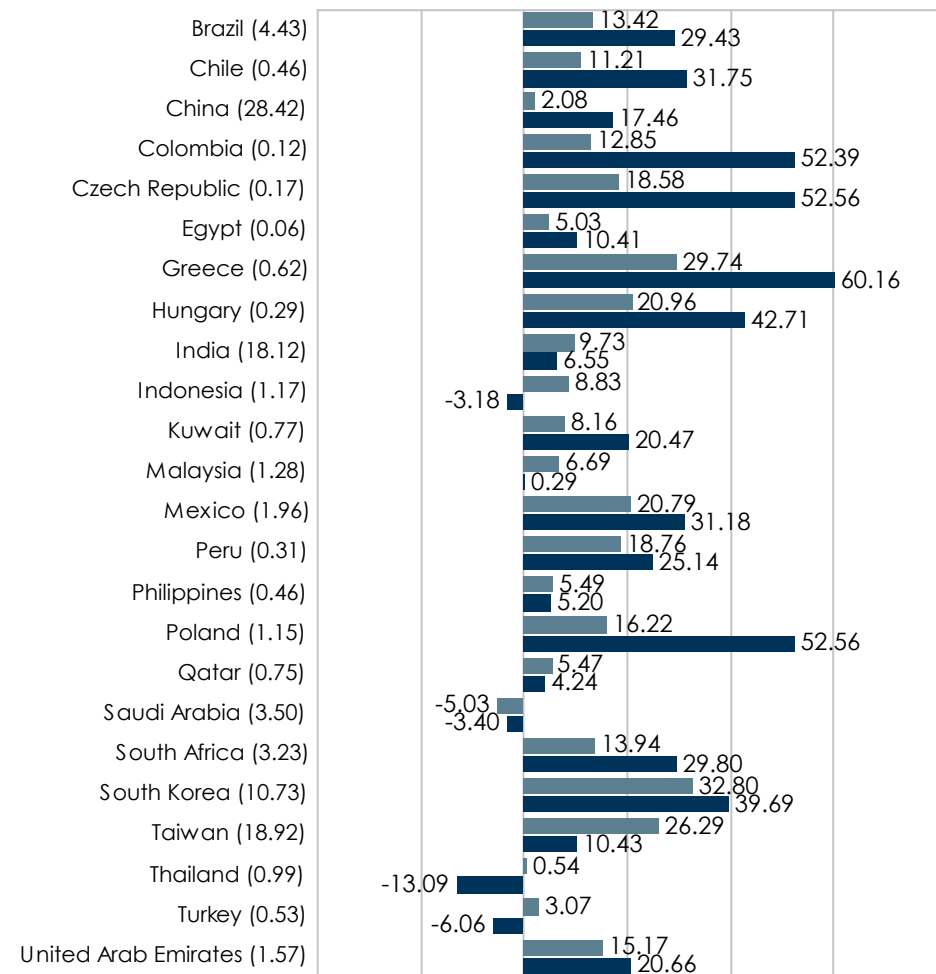
Emerging Markets - Performance Breakdown

For the Periods Ending June 30, 2025

MSCI Emerging Markets - Sector Returns (%)



MSCI Emerging Markets - Country Returns (%)



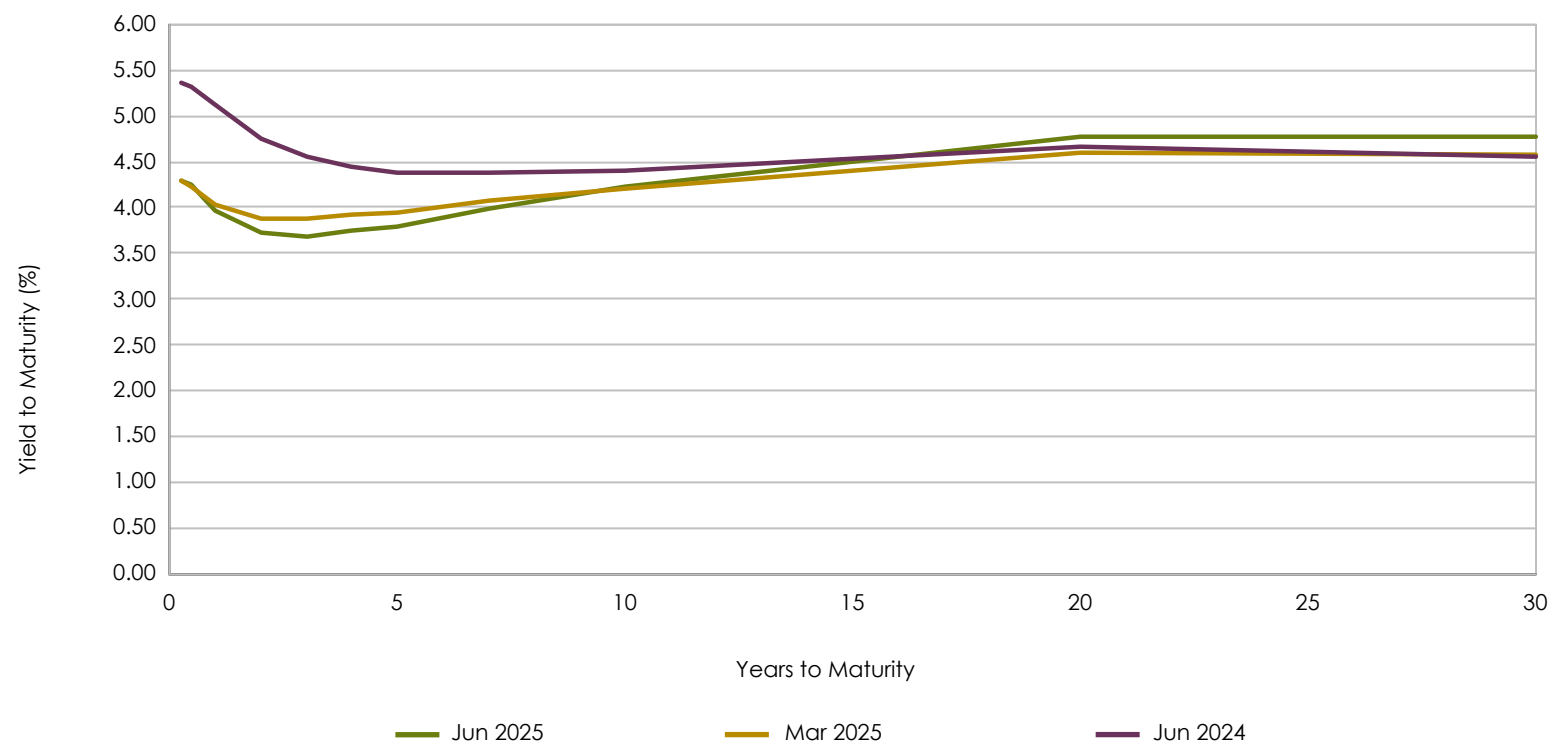
Numbers in parenthesis represent sector or country weights of the index. Sector or country weights may not add to 100% due to rounding.

Source: ACG Research, Bloomberg

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Interest Rate Term Structure

Government Issues - 3 Months to 30 Years Maturity

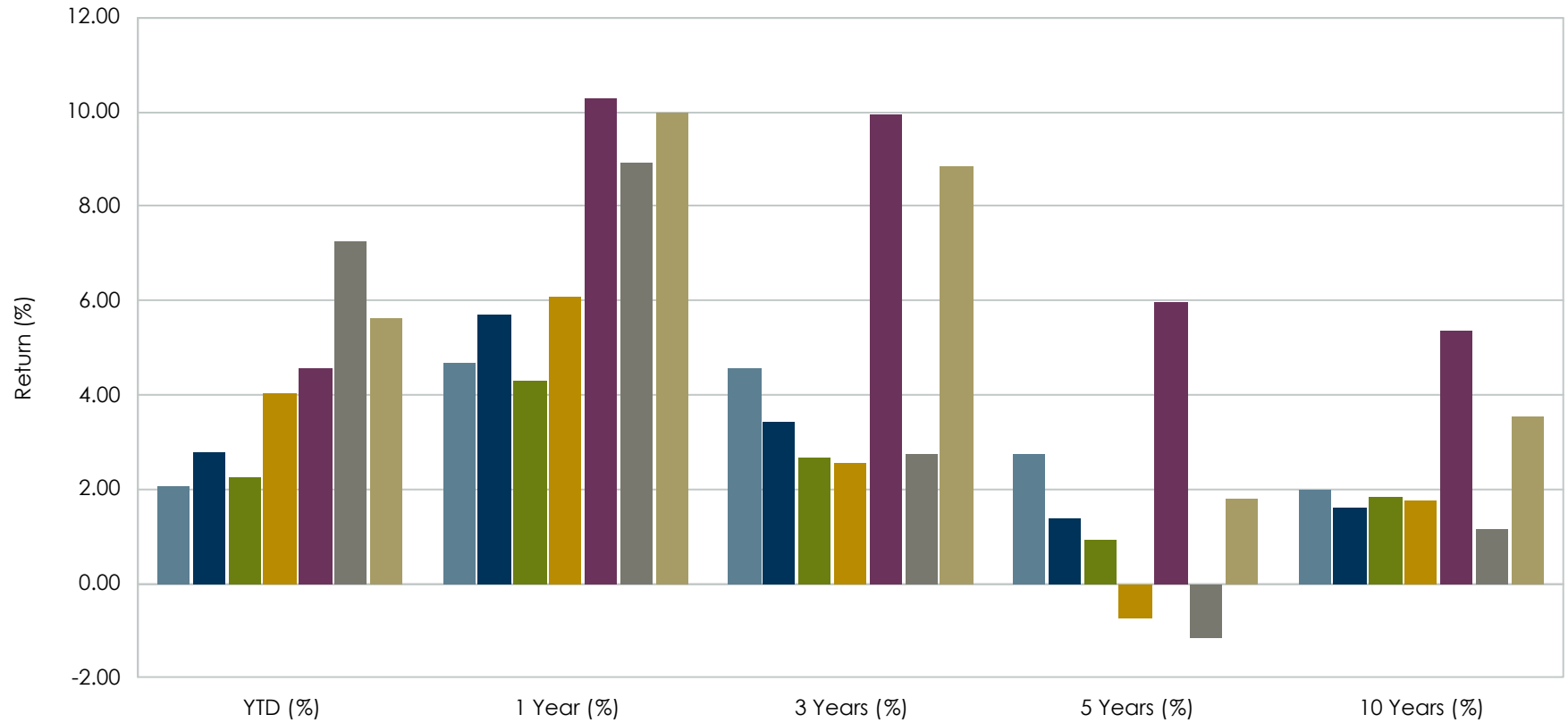


90 Days	4.30	4.30	5.36
180 Days	4.25	4.23	5.33
1 Year	3.97	4.03	5.12
2 Years	3.72	3.89	4.75
3 Years	3.69	3.88	4.55
4 Years	3.75	3.92	4.45
5 Years	3.80	3.95	4.38
7 Years	3.99	4.08	4.37
10 Years	4.23	4.21	4.40
20 Years	4.78	4.60	4.66
30 Years	4.78	4.57	4.56

Source: Bloomberg

Fixed Income Index Returns

For the Periods Ending June 30, 2025



US T-Bills 90 Day	2.07	4.68	4.56	2.76	1.98
ICE BofA 1-3 Yr Treasury	2.79	5.69	3.42	1.37	1.61
Bloomberg 5 Yr Municipal	2.27	4.29	2.66	0.93	1.84
Bloomberg US Aggregate	4.02	6.08	2.55	-0.73	1.76
Bloomberg US Corp High Yield	4.57	10.29	9.93	5.97	5.38
Bloomberg Global Aggregate	7.27	8.91	2.75	-1.16	1.17
JPM EMBI Global Diversified	5.64	9.97	8.86	1.79	3.53

US Fixed Income Market Environment

For the Periods Ending June 30, 2025

Nominal Returns By Sector (%)

	<u>3 Months</u>	<u>YTD</u>	<u>1 Year</u>	<u>3 Years</u>
US Aggregate	1.20	4.02	6.08	2.55
US Treasury	0.84	3.79	5.30	1.53
US Agg: Gov't-Related	1.70	4.37	6.21	3.22
US Corporate IG	1.83	4.18	6.89	4.34
MBS	1.15	4.23	6.52	2.32
CMBS	1.88	4.49	7.73	3.84
ABS	1.38	2.93	6.32	4.31
US Corp High Yield	3.53	4.57	10.28	9.93

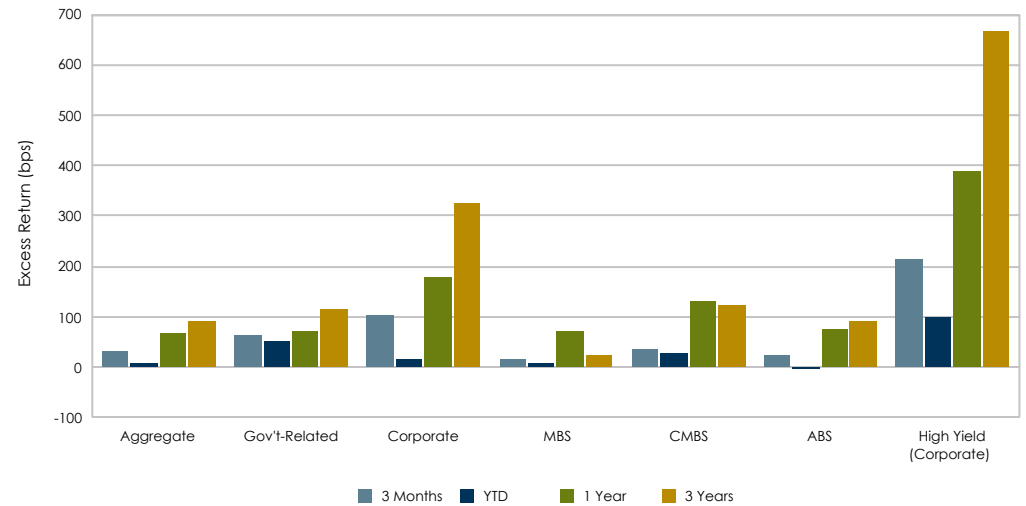
Nominal Returns by Quality (%)

	<u>3 Months</u>	<u>YTD</u>	<u>1 Year</u>	<u>3 Years</u>
AAA	1.61	4.00	6.61	2.61
AA	0.97	3.94	5.75	2.45
A	1.79	4.23	6.67	3.76
BAA	1.99	4.32	7.30	5.12
BA	3.44	4.98	8.91	8.85
B	3.62	4.39	9.47	9.96
CAA	4.01	3.56	16.71	12.65

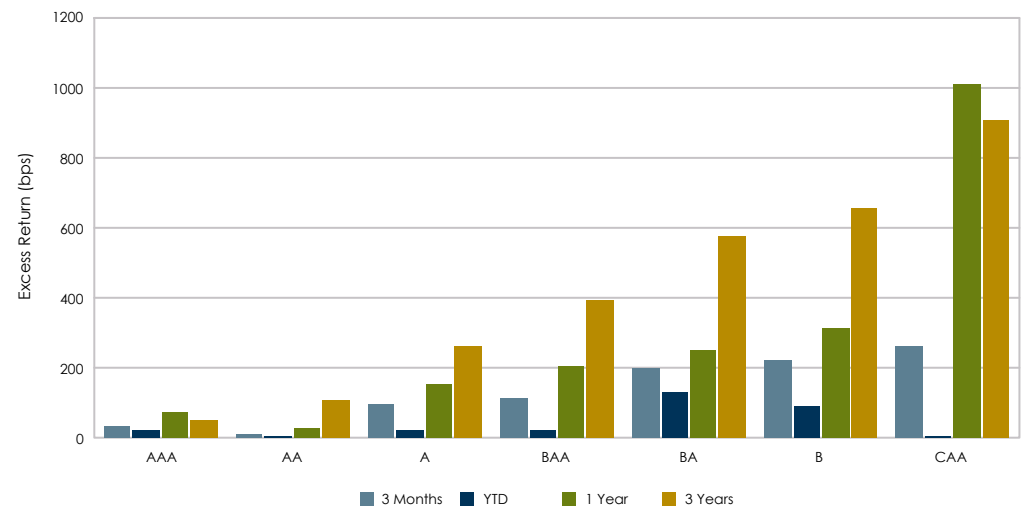
Nominal Returns by Maturity (%)

	<u>3 Months</u>	<u>YTD</u>	<u>1 Year</u>	<u>3 Years</u>
1-3 Yr.	1.26	2.91	5.94	3.77
3-5 Yr.	1.79	4.42	7.12	3.67
5-7 Yr.	1.83	4.96	7.17	3.13
7-10 Yr.	1.38	4.55	6.44	2.13
10+ Yr.	-0.12	3.28	3.25	-0.59

Excess Returns by Sector



Excess Returns by Quality



Source: Bloomberg

Excess returns are relative to the duration-neutral Treasury.

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FMIvT Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

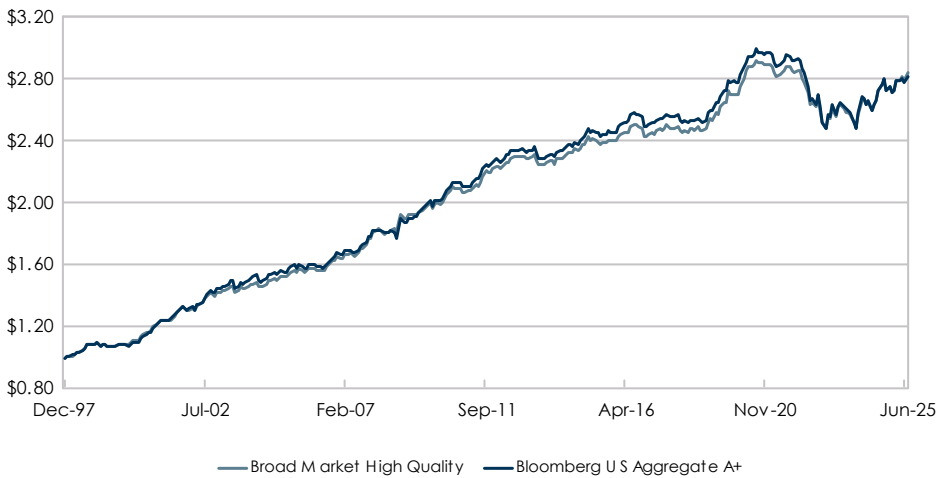
Portfolio Description	Portfolio Information
▪ Strategy Expanded High Quality Fixed Income ▪ Manager Atlanta Capital Management Company ▪ Vehicle Separately Managed Account ▪ Benchmark Barclays Aggregate A+ ▪ Performance Inception Date January 1998 ▪ Fees Manager Fees - 15 bps; Admin Fees - 14.5 bps ▪ Total Expenses Approximately 32 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in Government and high quality securities while maintaining an average maturity of approximately eight and one-half years. ▪ Outperform the Bloomberg US Aggregate A+ over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ The Portfolio is subject to interest rate, credit and liquidity risk, which may cause a loss of principal. Neither the Fund nor its yield is guaranteed by the US Government.			
		FYTD	1 Year
	Beginning Market Value	168,451	160,628
	Net Additions	8,692	8,344
	Return on Investment	2,671	10,842
	Income	4,930	6,493
	Gain/Loss	-2,259	4,349
	Ending Market Value	179,814	179,814

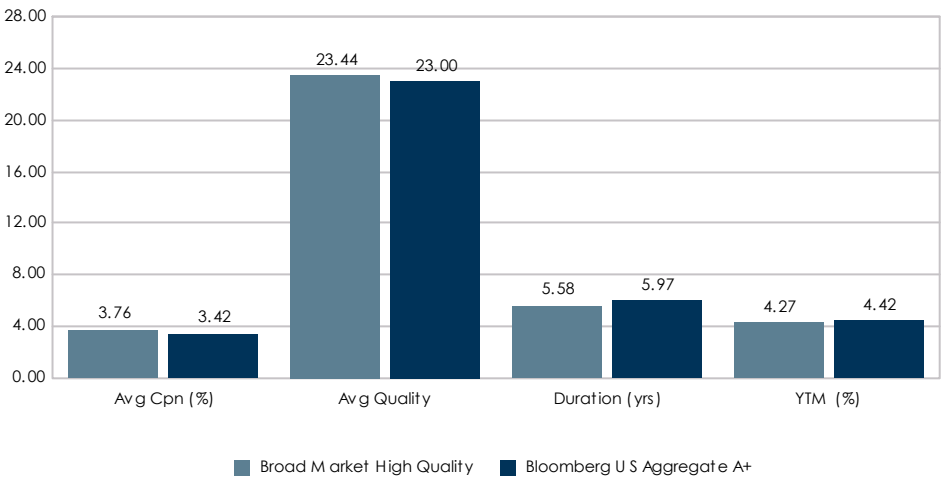
FMIvT Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

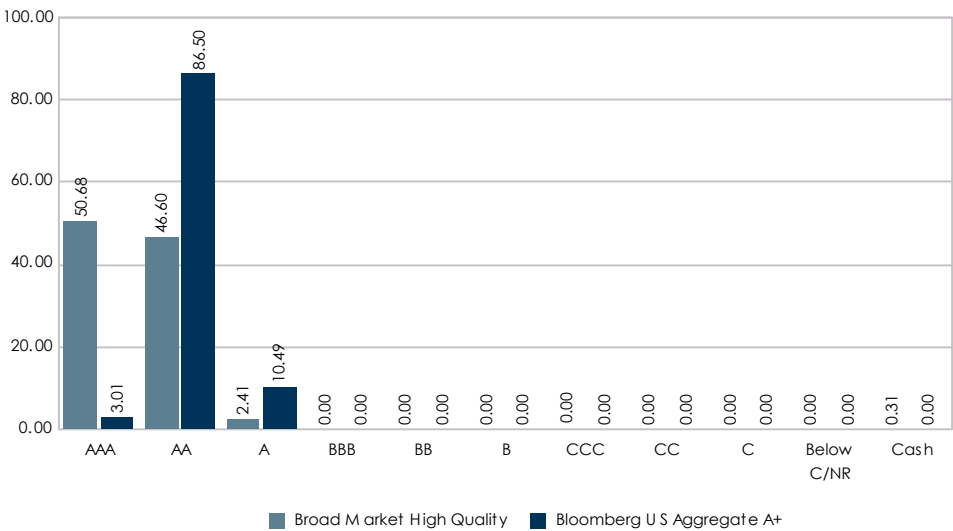
Growth of a Dollar



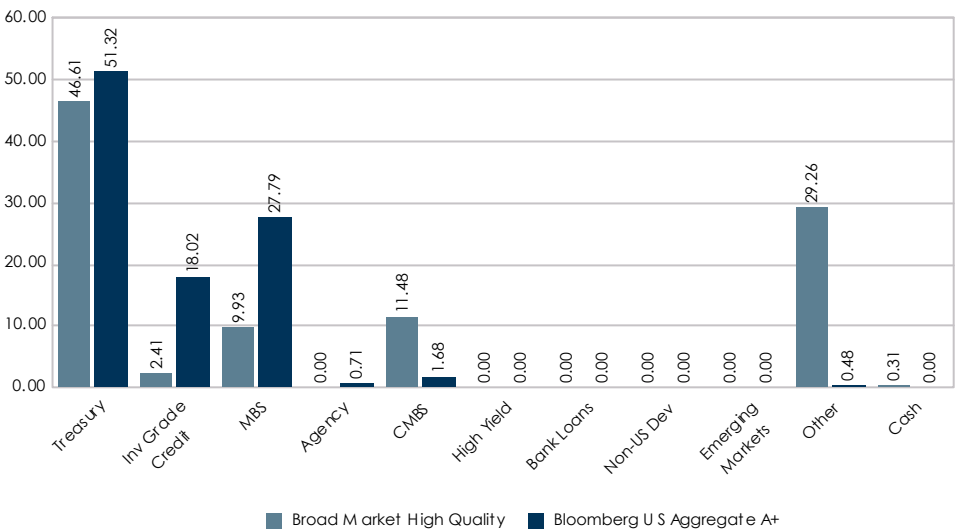
Characteristics



Quality Allocation



Sector Allocation

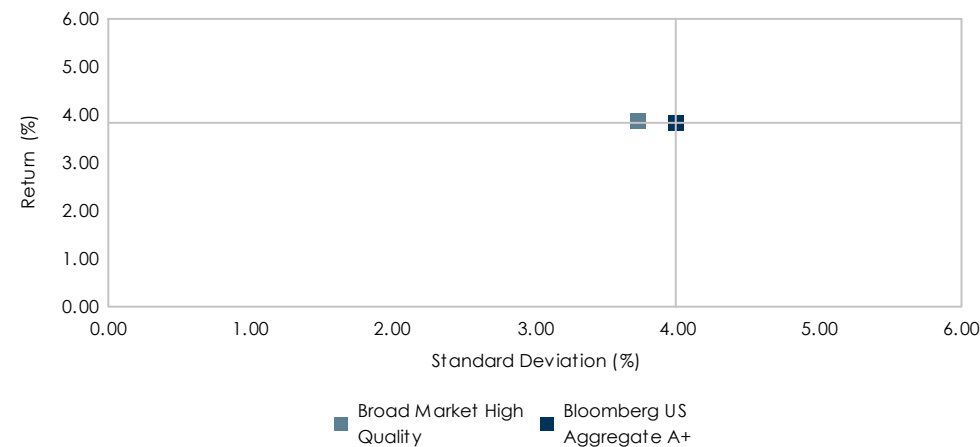


The Other sector consists of ABS, CMO, Convertibles, Municipals, Private Placements/144

FMIvT Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

Risk / Return Since Jan 1998



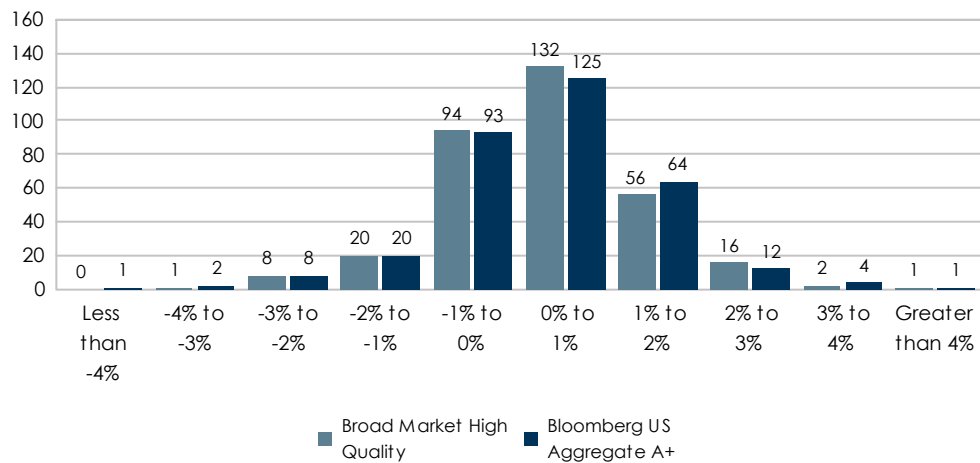
Portfolio Statistics Since Jan 1998

	Broad Market High Quality	Bloomberg US Aggregate A+
Return (%)	3.86	3.84
Standard Deviation (%)	3.72	3.99
Sharpe Ratio	0.49	0.46

Benchmark Relative Statistics

Beta	0.91
R Squared (%)	95.31
Alpha (%)	0.36
Tracking Error (%)	0.88
Batting Average (%)	49.70
Up Capture (%)	94.35
Down Capture (%)	88.78

Return Histogram Since Jan 1998

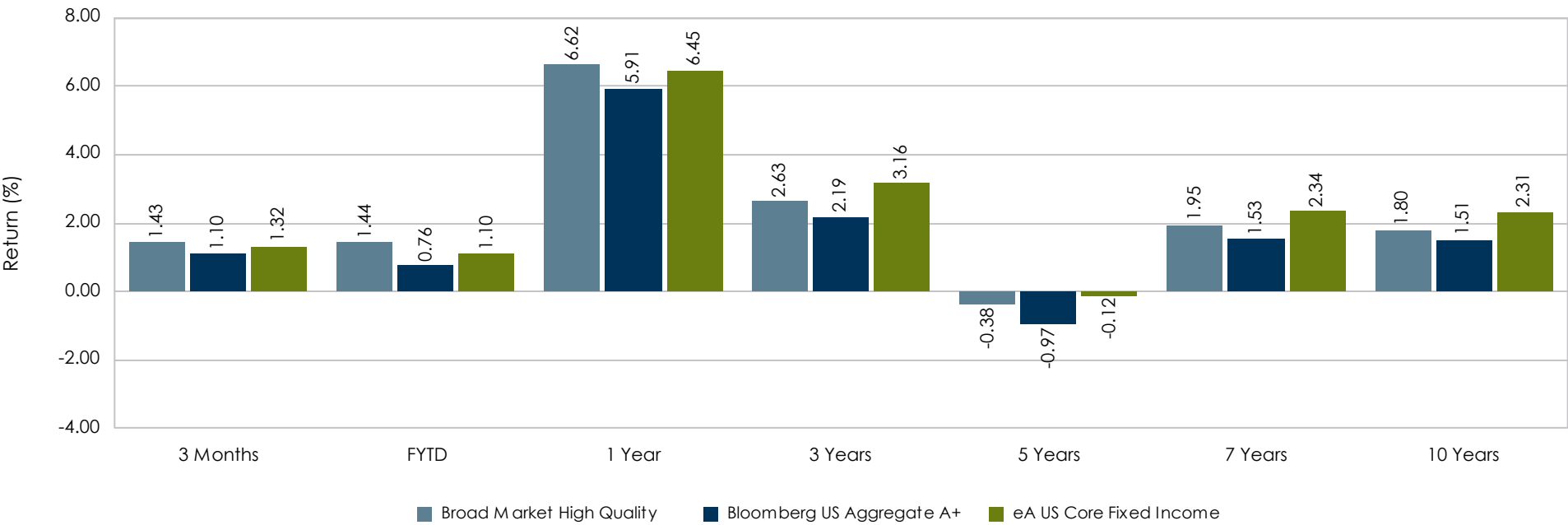


Return Analysis Since Jan 1998

	Broad Market High Quality	Bloomberg US Aggregate A+
Number of Months	330	330
Highest Monthly Return (%)	4.01	4.30
Lowest Monthly Return (%)	-3.40	-4.18
Number of Positive Months	207	206
Number of Negative Months	123	124
% of Positive Months	62.73	62.42

FMIvT Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

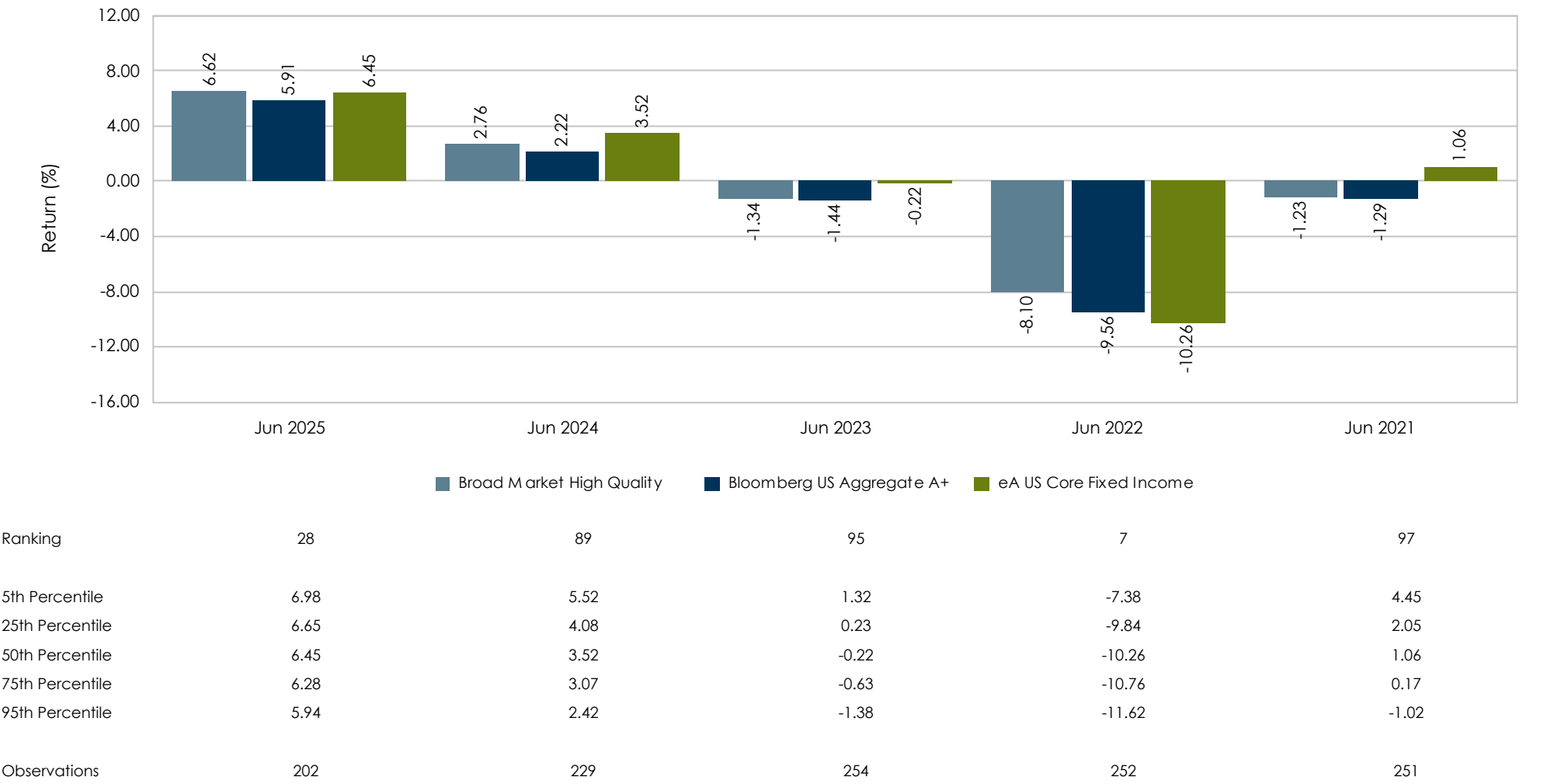


Ranking	31	17	28	91	80	92	99
5th Percentile	1.67	1.90	6.98	4.15	0.97	3.06	2.83
25th Percentile	1.46	1.32	6.65	3.43	0.26	2.59	2.48
50th Percentile	1.32	1.10	6.45	3.16	-0.12	2.34	2.31
75th Percentile	1.25	1.00	6.28	2.93	-0.33	2.16	2.11
95th Percentile	1.12	0.61	5.94	2.48	-0.69	1.84	1.87
Observations	202	202	202	201	194	189	181

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Broad Market High Quality Bond Fund

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Broad Market High Quality Bond Fund

For the Periods Ending June 30, 2025

Portfolio Sector Allocations	Max. %	Min. %	Actual Portfolio	Within Guidelines?	Comments
U.S. Govt Oblig., U.S. Govt Agency Oblig, or U.S. Govt Instrum. Oblig.	75.00%	30.00%	46.61%	Yes	
Mortgage Securities including CMO's	50.00%	0.00%	21.95%	Yes	
Corporate and Yankee Debt Obligations	30.00%	0.00%	2.41%	Yes	
Asset Backed Securities	30.00%	0.00%	28.72%	Yes	
Reverse Repurchase Agreements and/or other forms of financial leverage *	30.00%	0.00%	0.00%	Yes	
Other (Cash)	25.00%	0.00%	0.31%	Yes	
Portfolio Duration/Quality	Policy Expectations		Actual Portfolio	Within Guidelines?	Comments
Modified Duration					
Portfolio should maintain a duration equal to the Bloomberg US Aggregate A+ Index plus or minus 30% but no greater than 7 years.	4.18 to 7.00		5.58	Yes	
Credit quality					
Portfolio should Maintain a minimum bond fund rating of AA (Fitch).	AAf			Yes	
Individual Securities				Within Guidelines?	Comments
Minimum credit rating of A by any NRSRO for all corporate securities.				Yes	
Maximum of 3% at time of purchase and 5% of the portfolio value may be invested in corporate securities of an individual issuer.			2.67%	Yes	Largest Position Noted
A maximum of 5% of the portfolio, at market, may be invested in individual trusts of ABS and Non-Agency CMOs.			2.62%	Yes	Largest Position Noted
Final stated maturity of 31.0 years or less for all securities.				Yes	

*Asset Consulting Group is unable to verify the actual percentages in the portfolio. However, ACG has confirmed the actual portfolio allocation is less than the maximum percentage allowed.

FMIvT Core Plus Fixed Income Fund

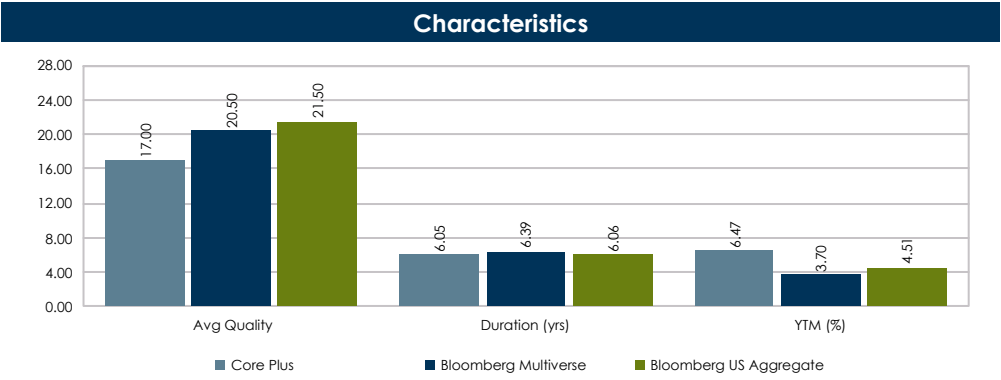
For the Periods Ending June 30, 2025

Portfolio Description	Portfolio Information		
▪ Strategy Core Plus Fixed Income ▪ Manager Pioneer Institutional Investment ▪ Vehicle Non-Mutual Commingled ▪ Benchmark Barclays Multiverse ▪ Performance Inception Date April 2014 ▪ Fees Manager Fee - 55 bps; Admin Fee - 14.5 bps ▪ Total Expenses Approximately 72 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following a Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.		
Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in a broad spectrum of fixed and floating rate debt securities that are diversified by credit quality, geography and duration. ▪ Outperform the Bloomberg Multiverse over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ The Portfolio is subject to interest rate, credit and liquidity risk, which may cause a loss of principal. Neither the Fund nor its yield is guaranteed by the US Government.			
		FYTD	1 Year
	Beginning Market Value	167,280	155,381
	Net Additions	7,207	9,186
	Return on Investment	6,244	16,163
	Ending Market Value	180,731	180,731

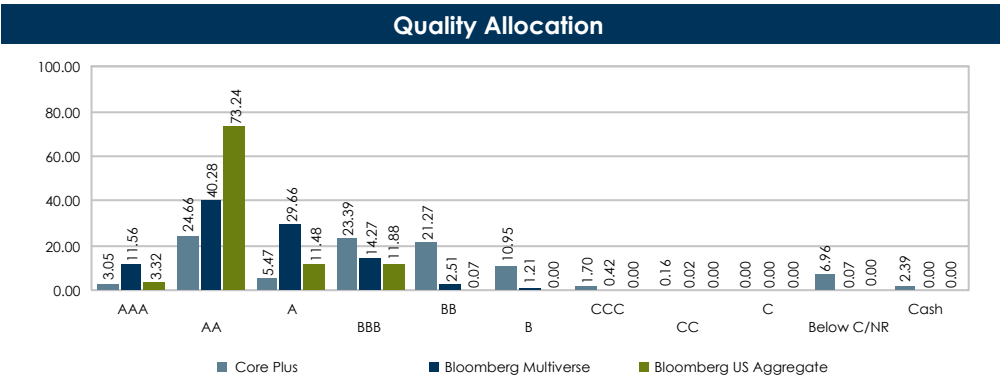
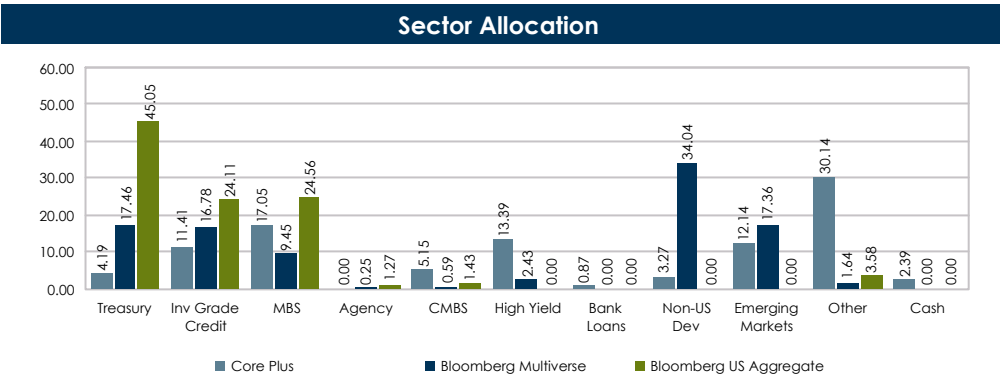
FMIvT Core Plus Fixed Income Fund

For the Periods Ending June 30, 2025

Manager Allocation		
Name	Market Value (\$000s)	Allocation (%)
Total Core Plus	180,731	100.00
Pioneer MSFI	180,731	100.00



Dollar Growth Summary (\$000s)		
	FYTD	1 Year
Beginning Market Value	167,280	155,381
Net Additions	7,207	9,186
Return on Investment	6,244	16,163
Ending Market Value	180,731	180,731

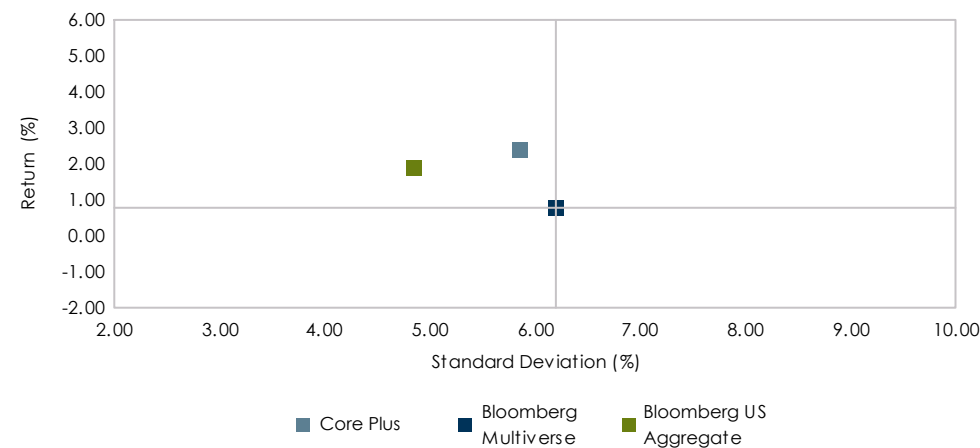


The Other sector consists of ABS, CMO, Convertibles, Municipals, Private Placements/144As and TIPS.

FMIvT Core Plus Fixed Income Fund

For the Periods Ending June 30, 2025

Risk / Return Since Apr 2014



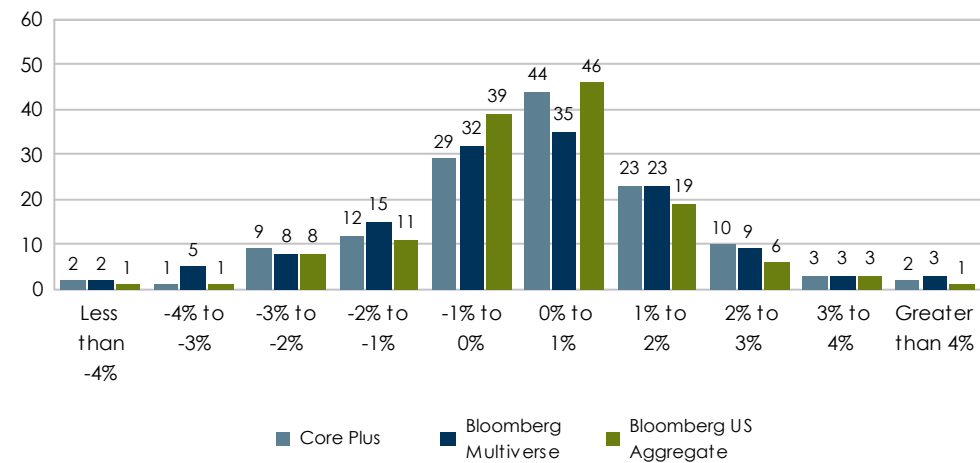
Portfolio Statistics Since Apr 2014

	Core Plus	Bloomberg Multiverse	Bloomberg US Aggregate
Return (%)	2.38	0.77	1.91
Standard Deviation (%)	5.85	6.19	4.85
Sharpe Ratio	0.11	-0.16	0.04

Benchmark Relative Statistics

Beta	0.66	0.78
R Squared (%)	49.07	42.13
Alpha (%)	1.91	0.95
Tracking Error (%)	4.67	4.57
Batting Average (%)	57.78	59.26
Up Capture (%)	68.16	79.96
Down Capture (%)	48.43	66.65

Return Histogram Since Apr 2014

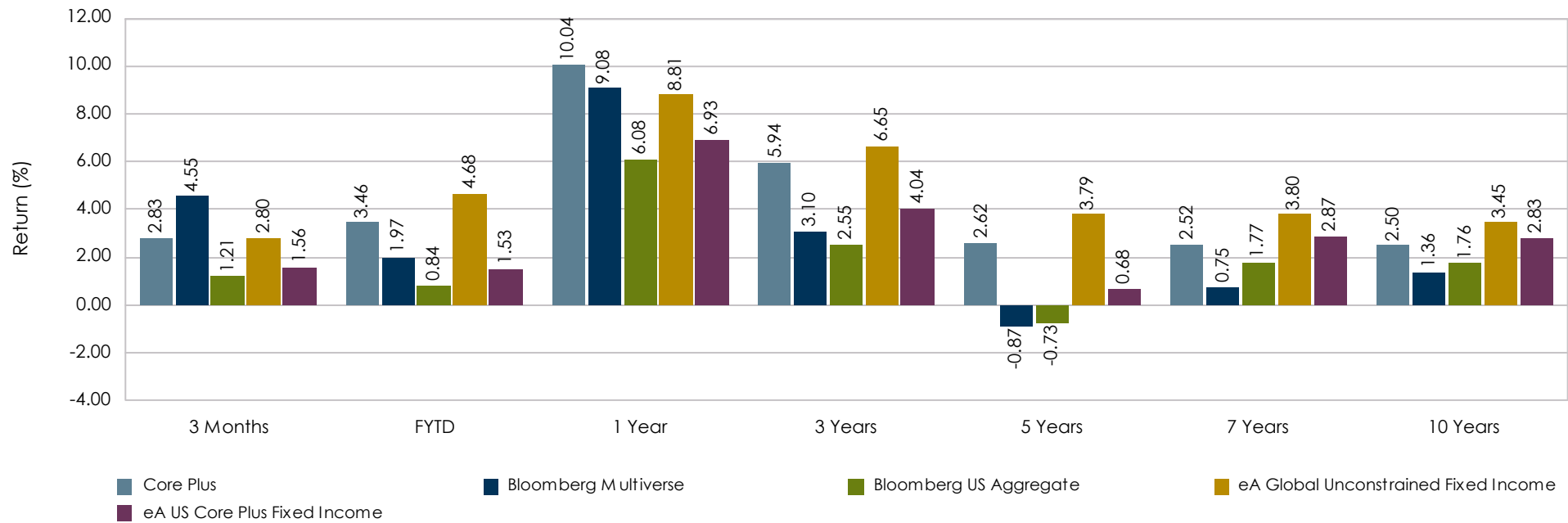


Return Analysis Since Apr 2014

	Core Plus	Bloomberg Multiverse	Bloomberg US Aggregate
Number of Months	135	135	135
Highest Monthly Return (%)	4.84	5.06	4.53
Lowest Monthly Return (%)	-8.40	-5.44	-4.32
Number of Positive Months	82	73	75
Number of Negative Months	53	62	60
% of Positive Months	60.74	54.07	55.56

FMIvT Core Plus Fixed Income Fund

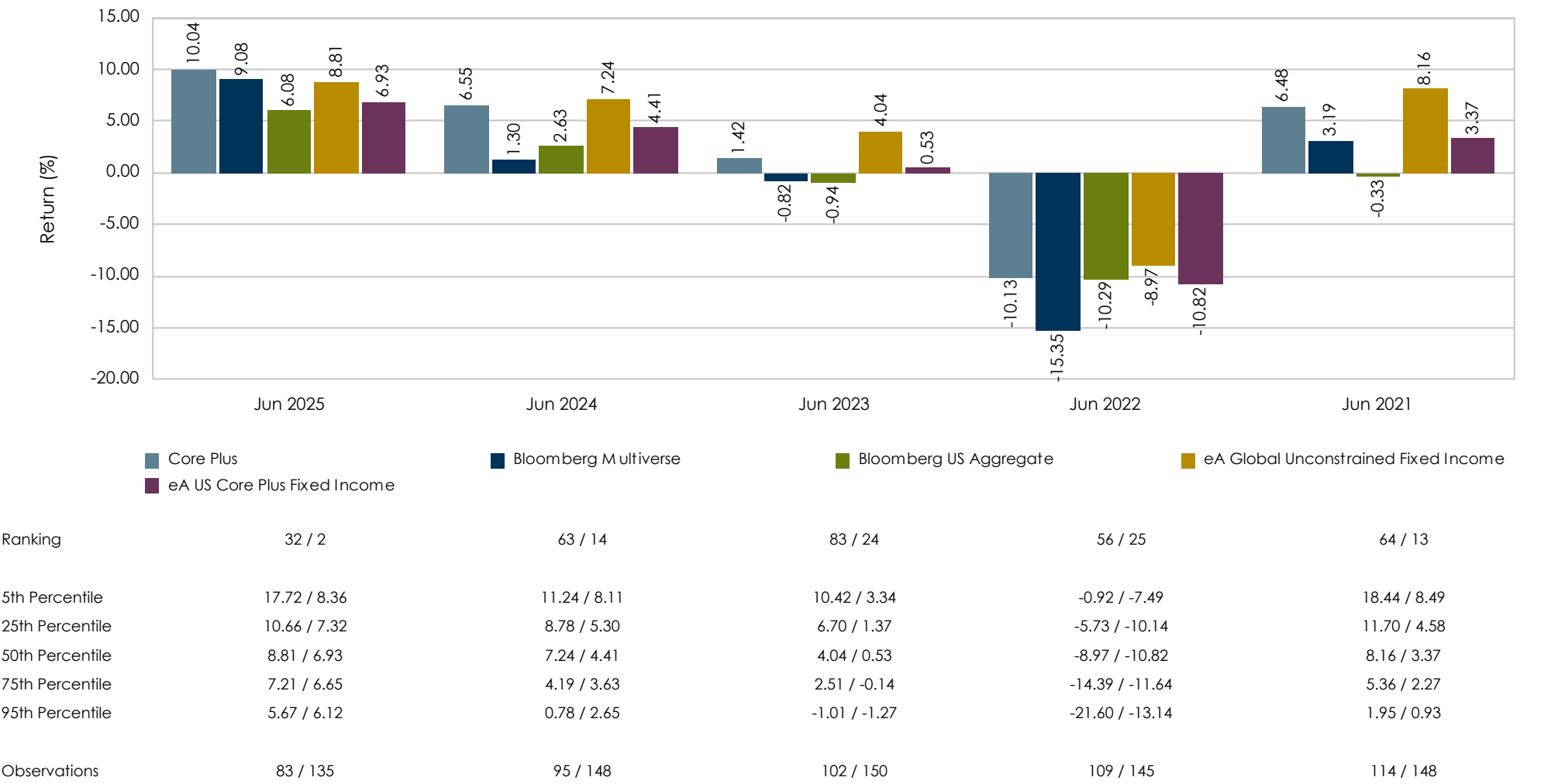
For the Periods Ending June 30, 2025



Ranking	50 / 2	74 / 2	32 / 2	71 / 6	78 / 8	84 / 78	77 / 81
5th Percentile	10.05 / 2.32	8.59 / 2.96	17.72 / 8.36	10.84 / 5.95	6.68 / 3.07	6.04 / 4.16	5.11 / 4.05
25th Percentile	6.53 / 1.76	5.70 / 1.89	10.66 / 7.32	8.72 / 4.55	4.83 / 1.47	4.50 / 3.33	4.19 / 3.27
50th Percentile	2.80 / 1.56	4.68 / 1.53	8.81 / 6.93	6.65 / 4.04	3.79 / 0.68	3.80 / 2.87	3.45 / 2.83
75th Percentile	2.16 / 1.42	3.40 / 1.25	7.21 / 6.65	5.75 / 3.58	2.71 / 0.35	3.07 / 2.57	2.69 / 2.55
95th Percentile	1.59 / 1.22	-0.27 / 0.79	5.67 / 6.12	3.75 / 2.84	0.92 / -0.27	1.58 / 2.27	1.38 / 2.22
Observations	83 / 135	83 / 135	83 / 135	83 / 135	79 / 130	75 / 121	64 / 112

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Core Plus Fixed Income Fund
For the One Year Periods Ending June

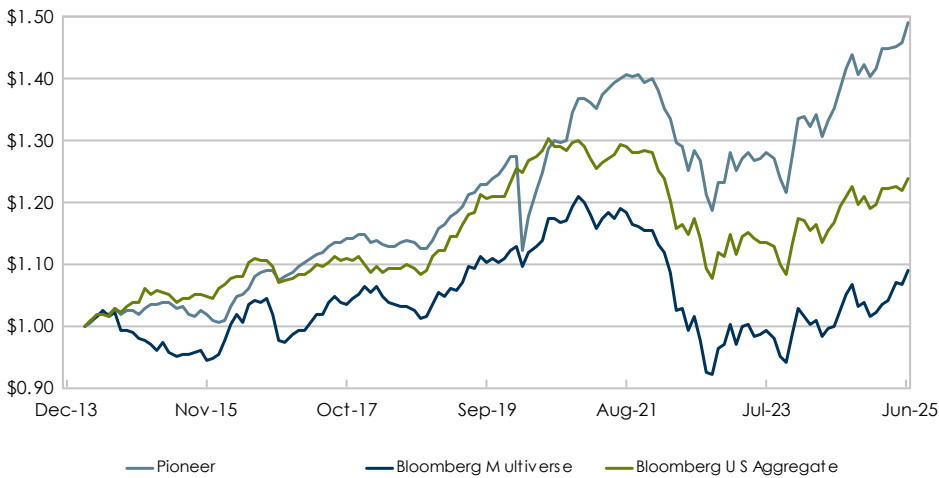


The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

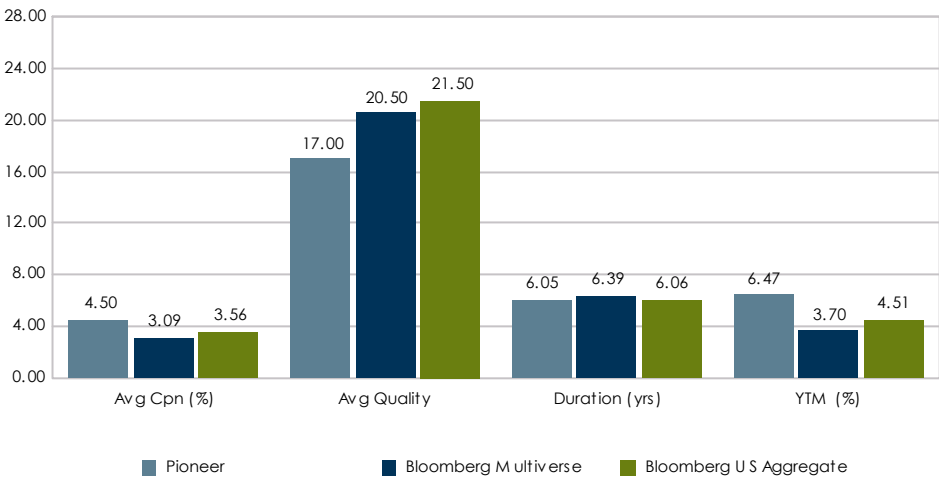
Pioneer MSFI

For the Periods Ending June 30, 2025

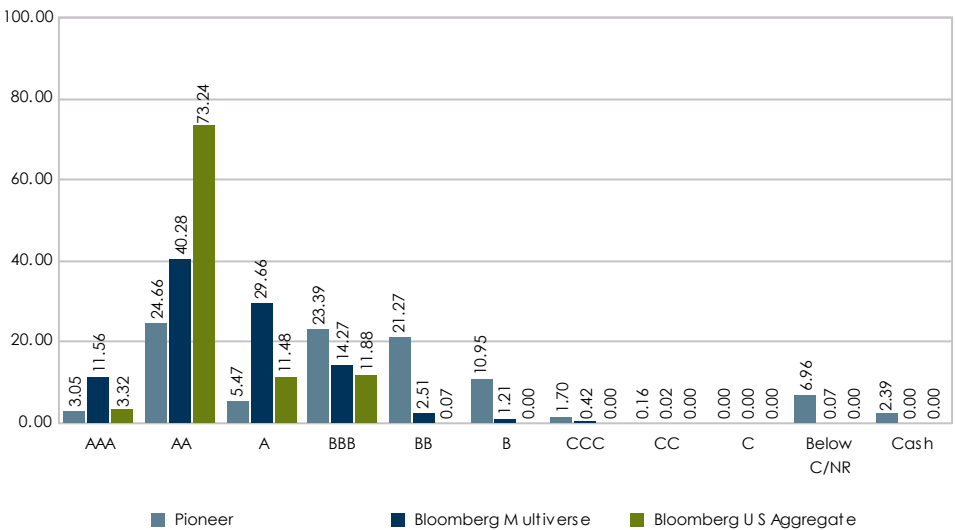
Growth of a Dollar



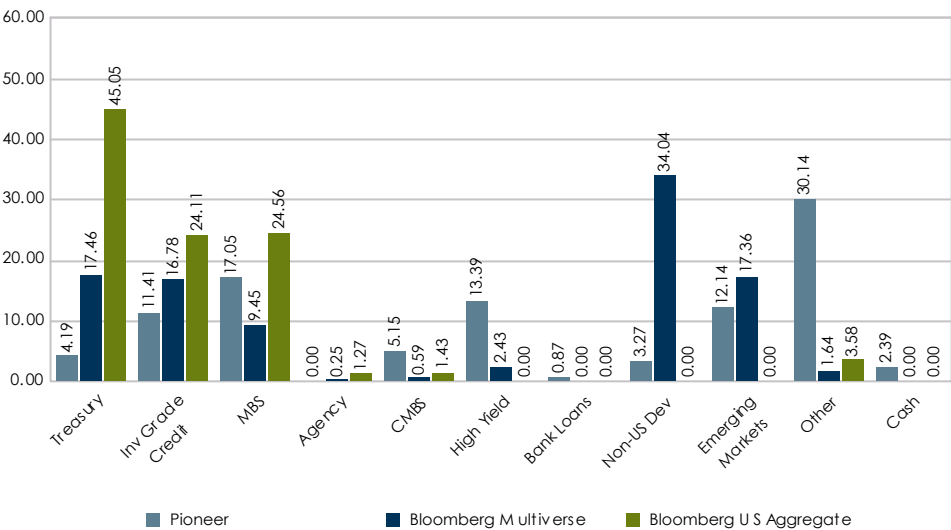
Characteristics



Quality Allocation



Sector Allocation



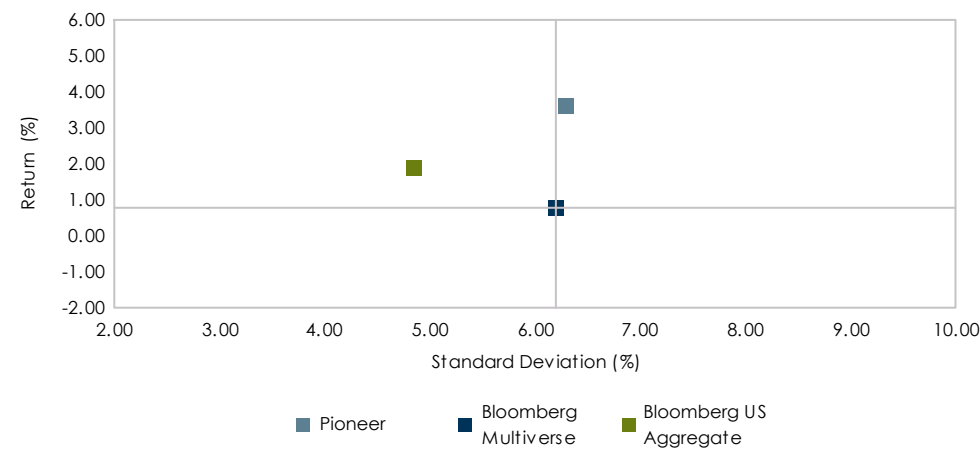
Characteristic and allocation charts represents the composite data of the Pioneer Multi-Sector Fixed Income.

The Other sector consists of ABS, CMO, Convertibles, Municipals, Private Placements/144

Pioneer MSFI

For the Periods Ending June 30, 2025

Risk / Return Since Apr 2014



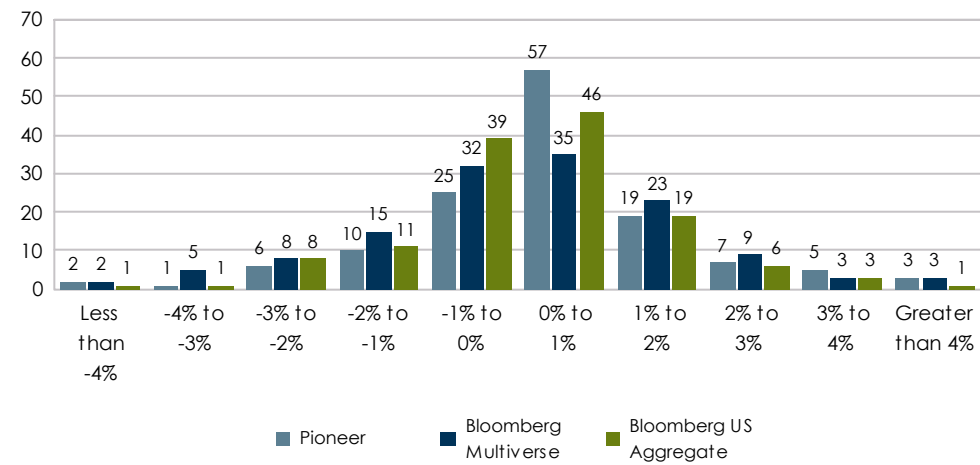
Portfolio Statistics Since Apr 2014

	Pioneer	Bloomberg Multiverse	Bloomberg US Aggregate
Return (%)	3.60	0.77	1.91
Standard Deviation (%)	6.30	6.19	4.85
Sharpe Ratio	0.30	-0.16	0.04

Benchmark Relative Statistics

Beta	0.77	0.93
R Squared (%)	57.58	50.99
Alpha (%)	3.05	1.90
Tracking Error (%)	4.34	4.42
Batting Average (%)	65.19	62.96
Up Capture (%)	89.99	111.10
Down Capture (%)	55.93	83.44

Return Histogram Since Apr 2014

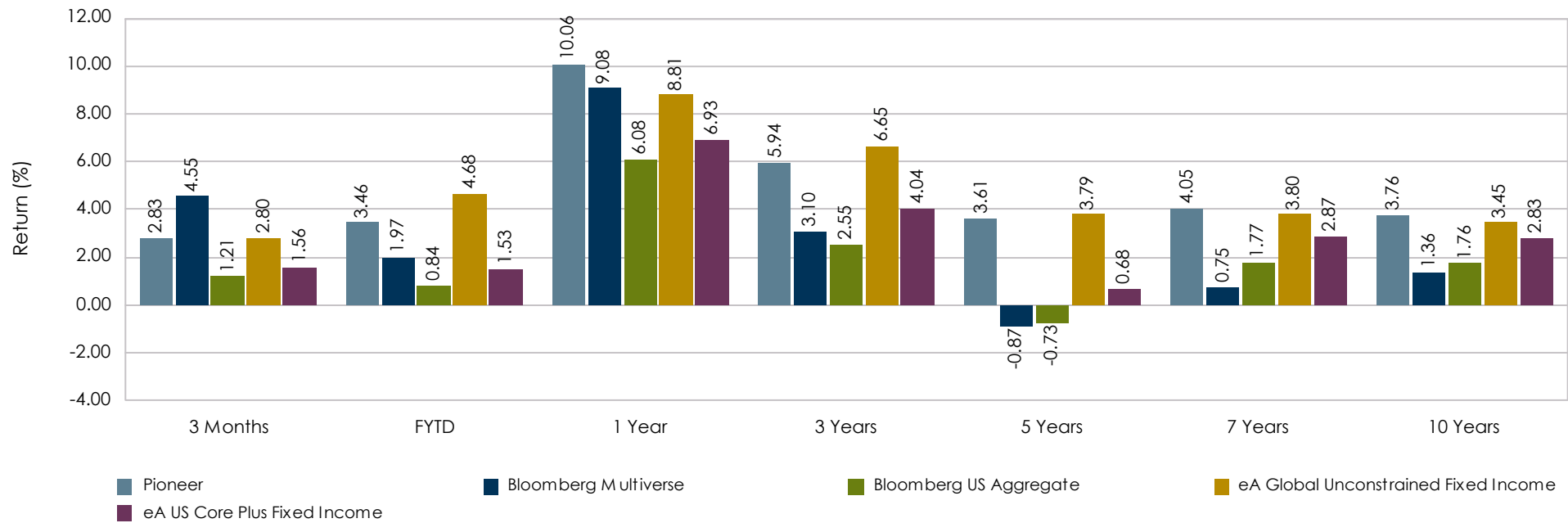


Return Analysis Since Apr 2014

	Pioneer	Bloomberg Multiverse	Bloomberg US Aggregate
Number of Months	135	135	135
Highest Monthly Return (%)	4.84	5.06	4.53
Lowest Monthly Return (%)	-11.69	-5.44	-4.32
Number of Positive Months	91	73	75
Number of Negative Months	44	62	60
% of Positive Months	67.41	54.07	55.56

Pioneer MSFI

For the Periods Ending June 30, 2025

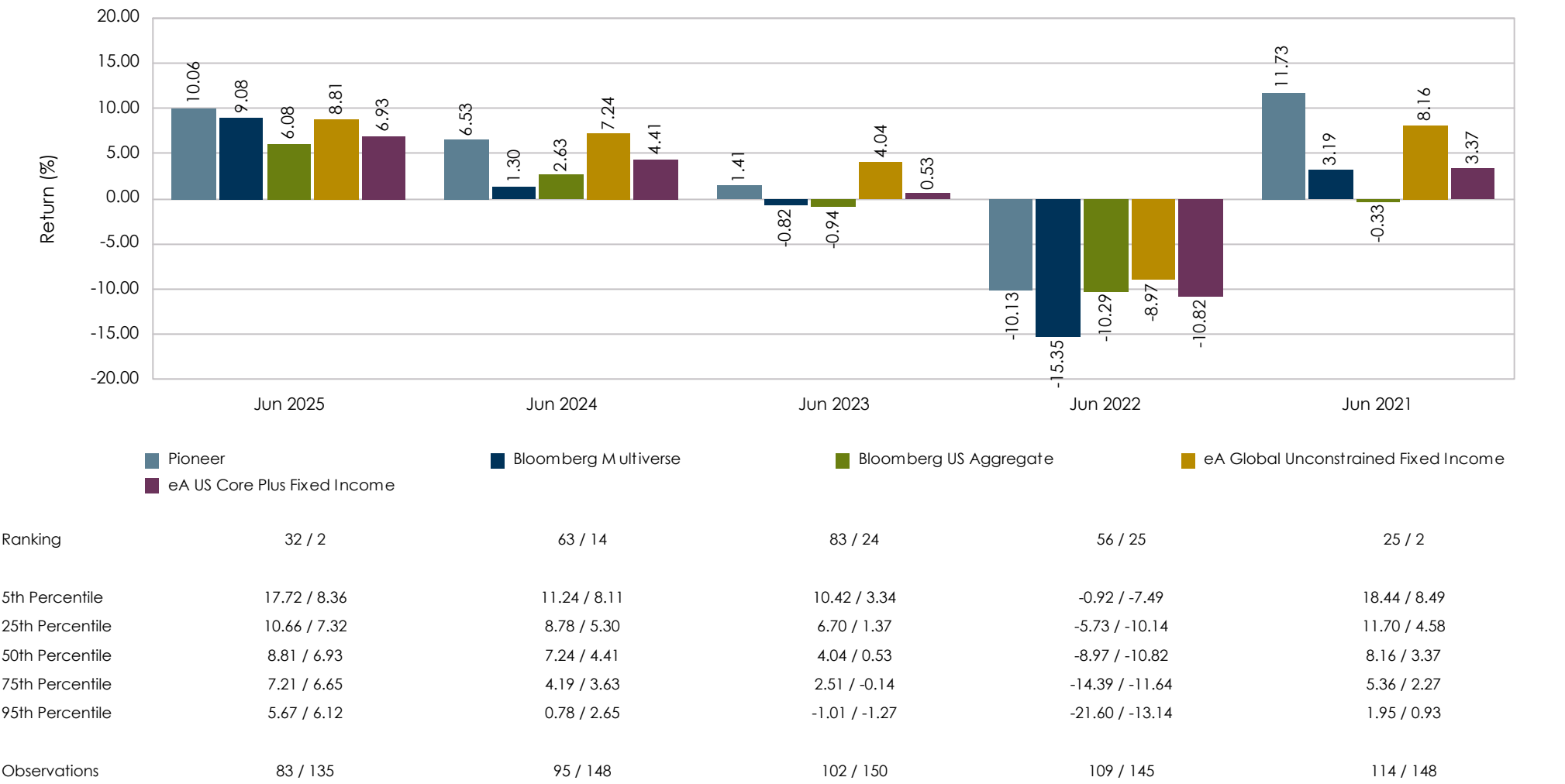


Ranking	50 / 2	74 / 2	32 / 2	71 / 6	59 / 4	37 / 7	39 / 13
5th Percentile	10.05 / 2.32	8.59 / 2.96	17.72 / 8.36	10.84 / 5.95	6.68 / 3.07	6.04 / 4.16	5.11 / 4.05
25th Percentile	6.53 / 1.76	5.70 / 1.89	10.66 / 7.32	8.72 / 4.55	4.83 / 1.47	4.50 / 3.33	4.19 / 3.27
50th Percentile	2.80 / 1.56	4.68 / 1.53	8.81 / 6.93	6.65 / 4.04	3.79 / 0.68	3.80 / 2.87	3.45 / 2.83
75th Percentile	2.16 / 1.42	3.40 / 1.25	7.21 / 6.65	5.75 / 3.58	2.71 / 0.35	3.07 / 2.57	2.69 / 2.55
95th Percentile	1.59 / 1.22	-0.27 / 0.79	5.67 / 6.12	3.75 / 2.84	0.92 / -0.27	1.58 / 2.27	1.38 / 2.22
Observations	83 / 135	83 / 135	83 / 135	83 / 135	79 / 130	75 / 121	64 / 112

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Pioneer MSFI

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Diversified Large Cap Equity Portfolio

For the Periods Ending June 30, 2025

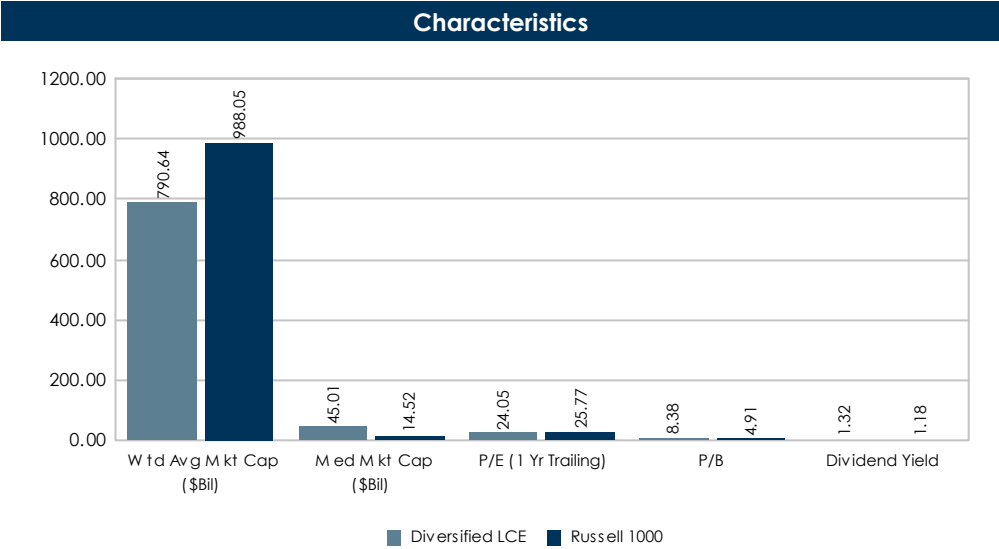
Portfolio Description	Portfolio Information
▪ Strategy Large Cap US Equity ▪ Manager StateStreet, Hotchkis & Wiley, & Atlanta Capital ▪ Vehicle Non-Mutual Commingled ▪ Benchmark Russell 1000 ▪ Performance Inception Date October 2017 ▪ Fees Manager Fee - 27 bps; Admin Fee - 14.5 bps ▪ Total Expenses Approximately 43 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in large cap US stocks that are diversified by industry and sector. ▪ Outperform the Russell 1000 over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ Stock values fluctuate in response to the activities of individual companies, the general market and economic conditions. Shares of the Portfolio are neither insured nor guaranteed by any US Government agency, including the FDIC.			
		FYTD	1 Year
	Beginning Market Value	300,035	292,116
	Net Additions	5,502	-4,067
	Return on Investment	20,603	38,091
	Ending Market Value	326,140	326,140

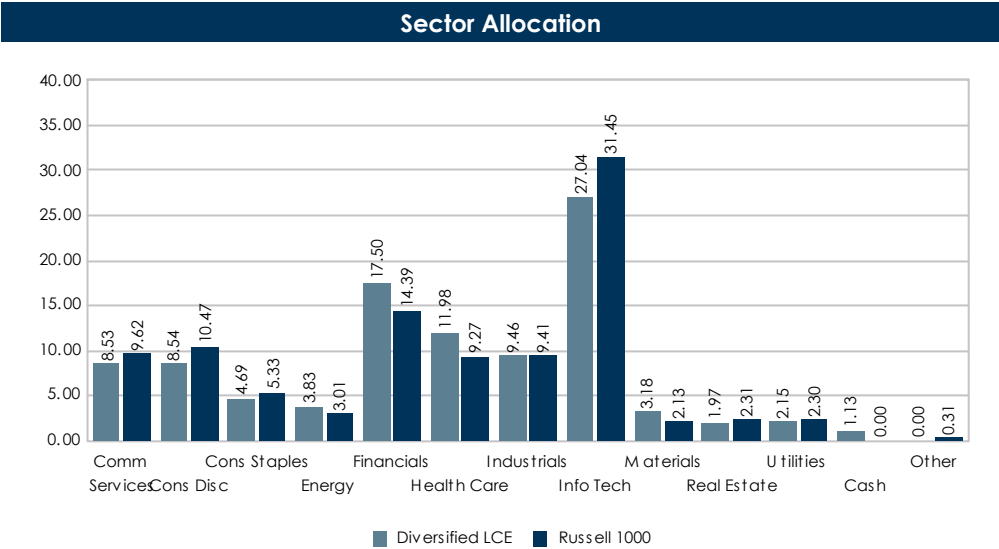
FMIvT Diversified Large Cap Equity Portfolio

For the Periods Ending June 30, 2025

Manager Allocation		
Name	Market Value (\$000s)	Allocation (%)
Total Diversified LCE	326,140	100.00
SSgA S&P 500 Index	194,642	59.68
Atlanta Capital High Quality Growth	66,129	20.28
Hotchkis & Wiley Diversified Value	65,370	20.04



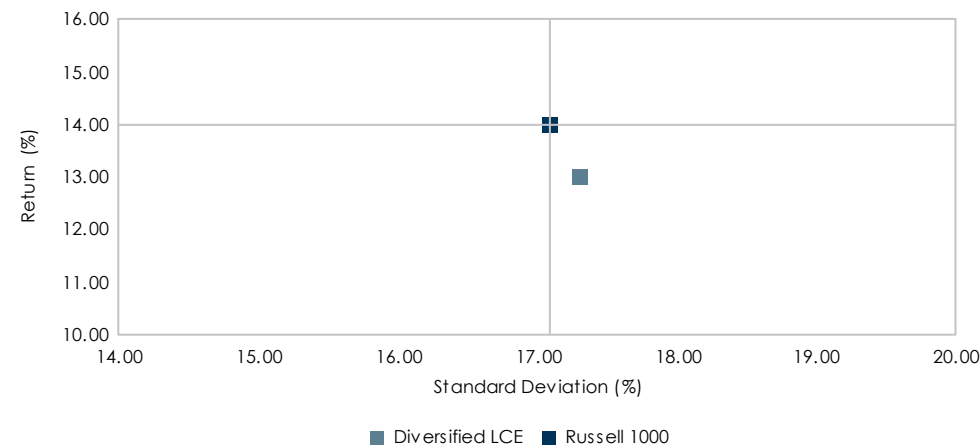
Dollar Growth Summary (\$000s)		
	FYTD	1 Year
Beginning Market Value	300,035	292,116
Net Additions	5,502	-4,067
Return on Investment	20,603	38,091
Ending Market Value	326,140	326,140



FMIvT Diversified Large Cap Equity Portfolio

For the Periods Ending June 30, 2025

Risk / Return Since Oct 2017



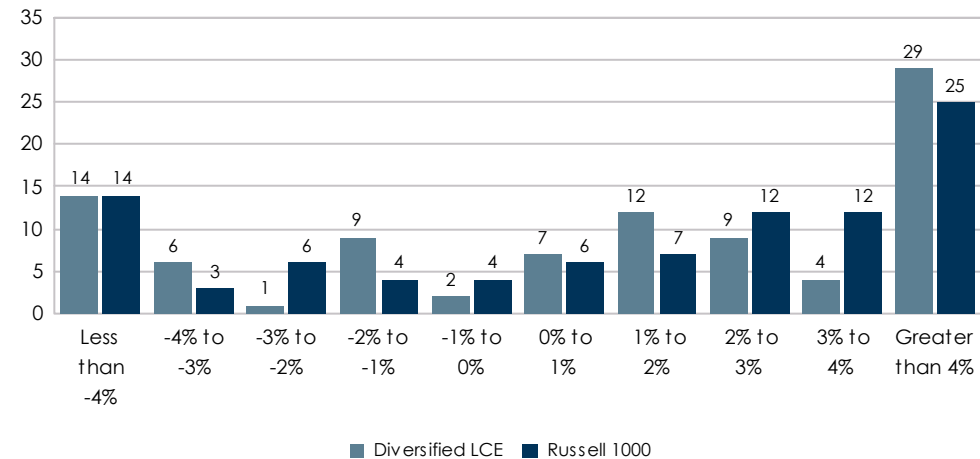
Portfolio Statistics Since Oct 2017

	Diversified LCE	Russell 1000
Return (%)	13.00	13.99
Standard Deviation (%)	17.30	17.09
Sharpe Ratio	0.61	0.68

Benchmark Relative Statistics

Beta	1.00
R Squared (%)	97.60
Alpha (%)	-0.85
Tracking Error (%)	2.68
Batting Average (%)	45.16
Up Capture (%)	95.62
Down Capture (%)	99.05

Return Histogram Since Oct 2017

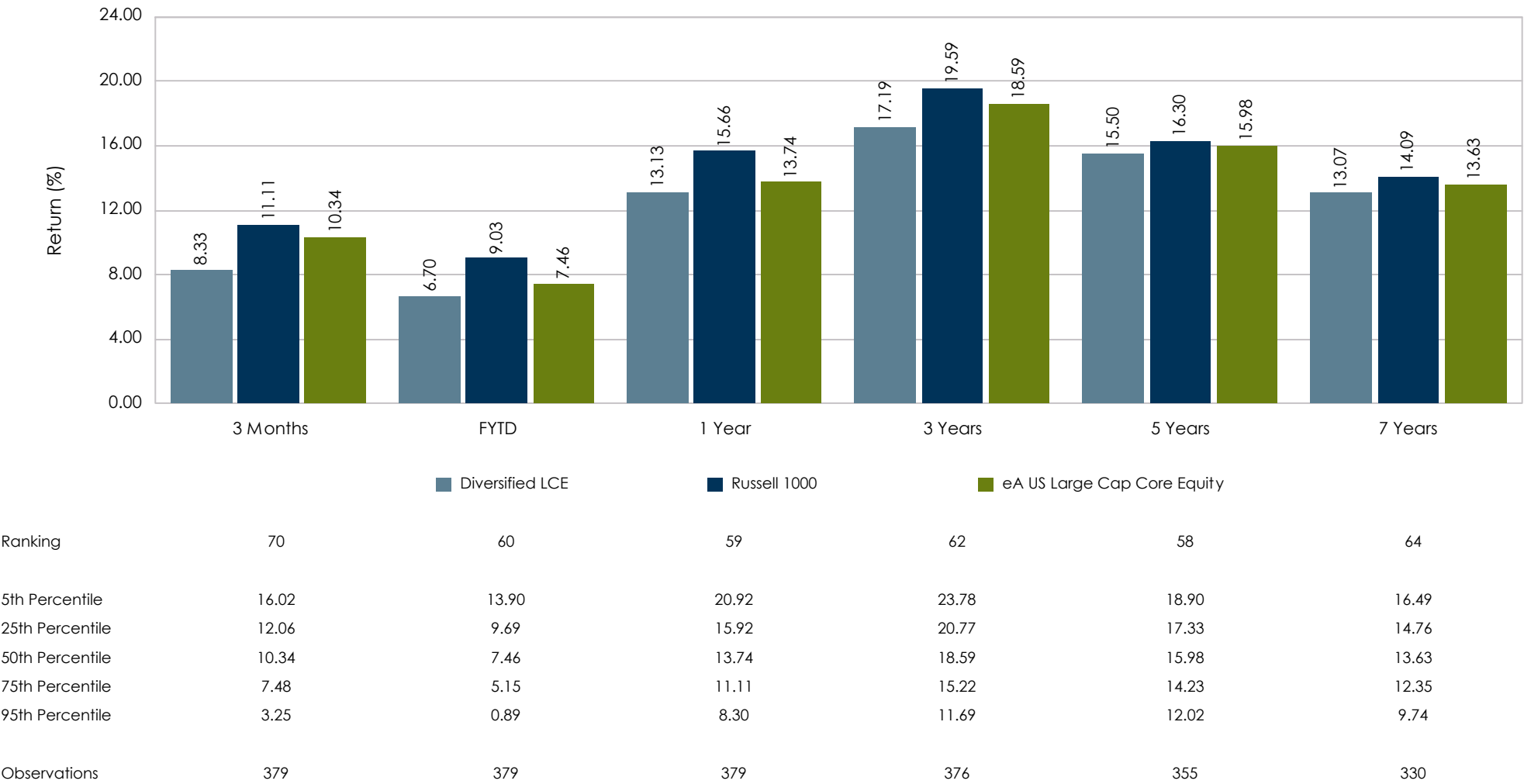


Return Analysis Since Oct 2017

	Diversified LCE	Russell 1000
Number of Months	93	93
Highest Monthly Return (%)	13.79	13.21
Lowest Monthly Return (%)	-14.99	-13.21
Number of Positive Months	61	62
Number of Negative Months	32	31
% of Positive Months	65.59	66.67

FMIvT Diversified Large Cap Equity Portfolio

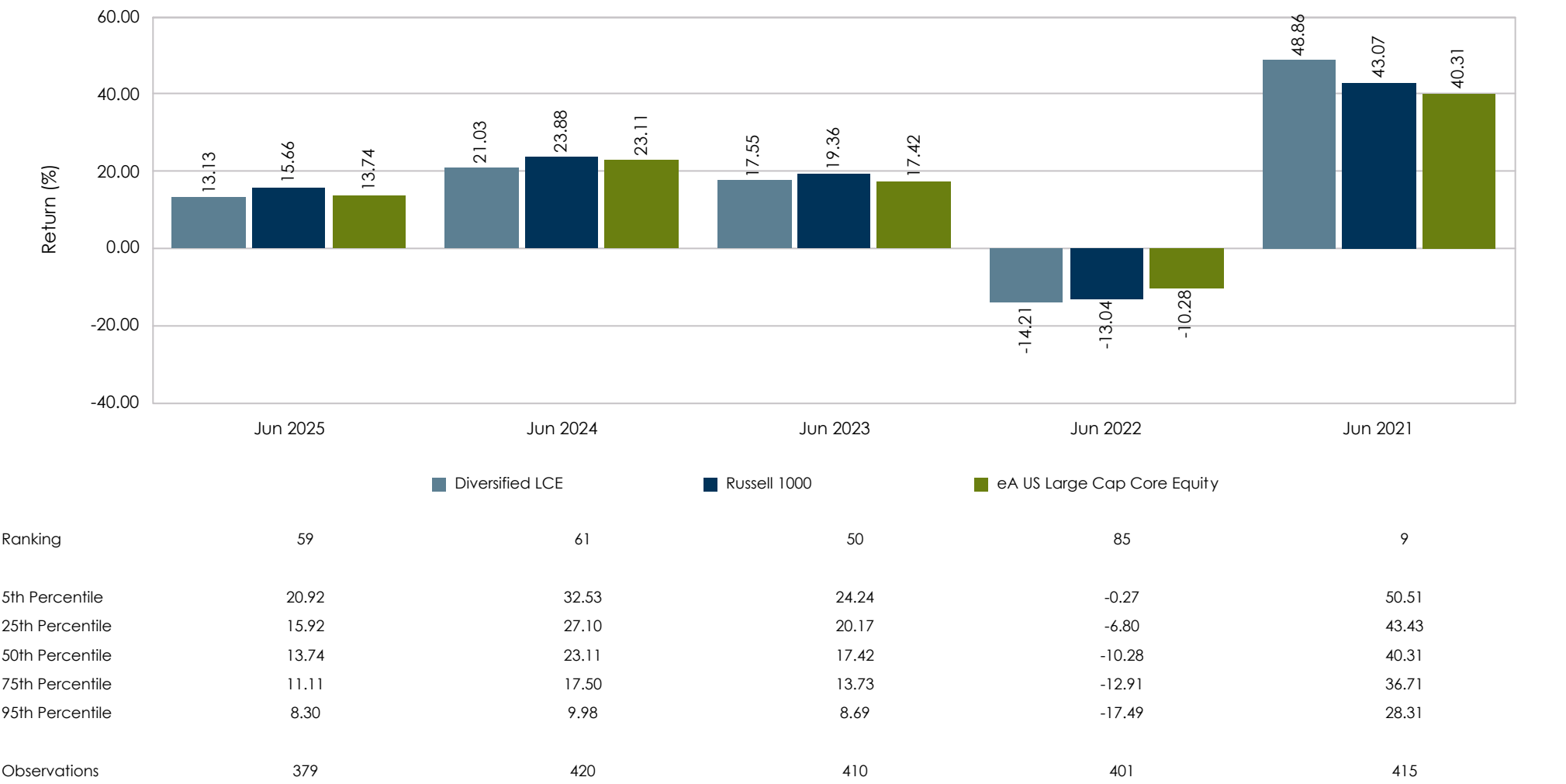
For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Diversified Large Cap Equity Portfolio

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Diversified Large Cap Equity Portfolio

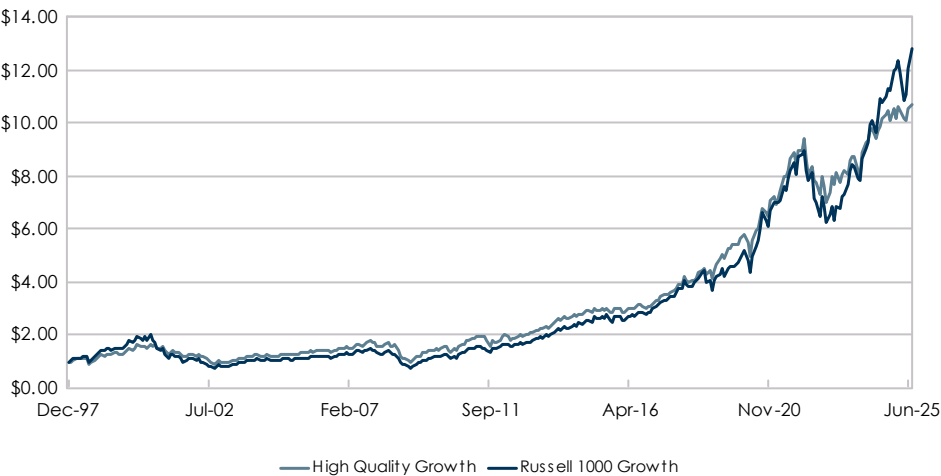
For the Periods Ending June 30, 2025

Manager Allocations	Target %	Range%	Actual Portfolio	Within Guidelines?	Comments
SSgA S&P 500 Index	60.0%	50% - 70%	59.68%	Yes	
Atlanta Capital High Quality Growth	20.0%	10% - 30%	20.28%	Yes	
Hotchkis & Wiley Diversified Value	20.0%	10% - 30%	20.04%	Yes	
Allocation	Max. %		Actual Portfolio	Within Guidelines?	Comments
A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.0%		1.13%	Yes	
The portfolio shall not own private placements, unregistered or registered stock, options, futures, or commodities, nor participate in margin trading.	N/A		N/A	Yes	

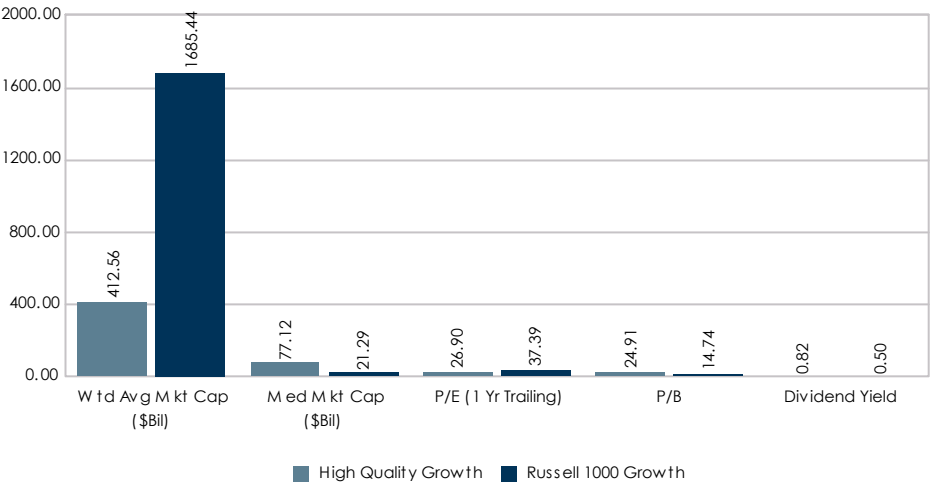
Atlanta Capital High Quality Growth

For the Periods Ending June 30, 2025

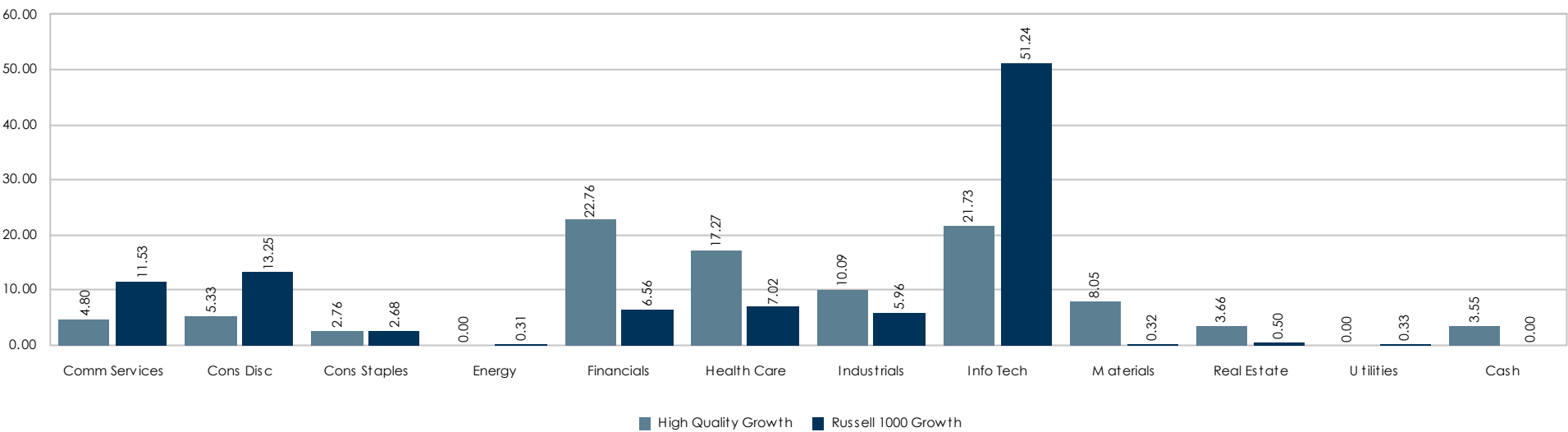
Growth of a Dollar



Characteristics



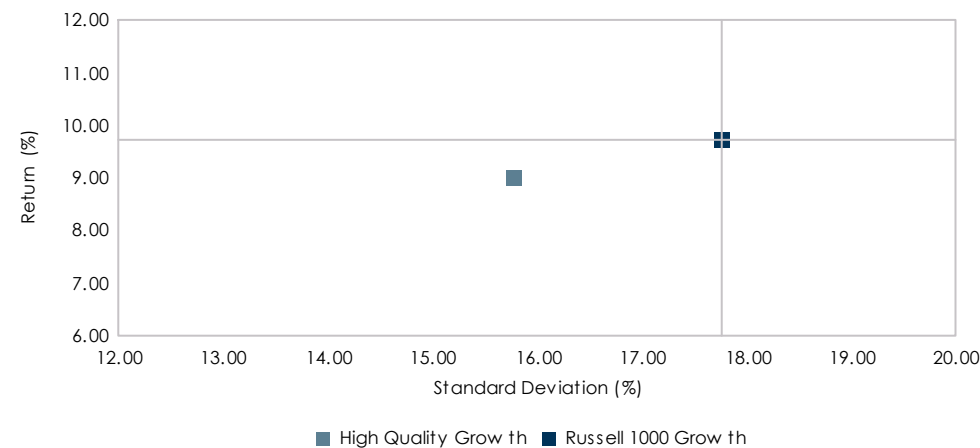
Sector Allocation



Atlanta Capital High Quality Growth

For the Periods Ending June 30, 2025

Risk / Return Since Jan 1998



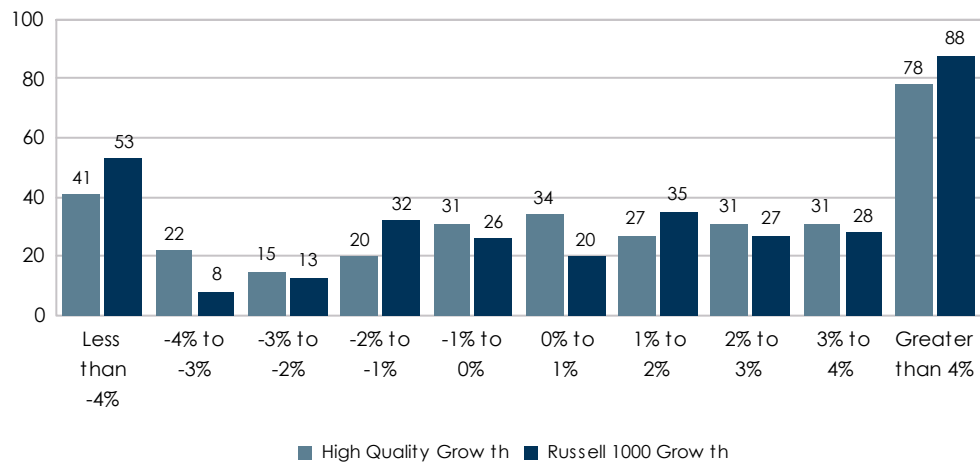
Portfolio Statistics Since Jan 1998

	High Quality Growth	Russell 1000 Growth
Return (%)	9.01	9.72
Standard Deviation (%)	15.78	17.77
Sharpe Ratio	0.44	0.43

Benchmark Relative Statistics

Beta	0.82
R Squared (%)	86.18
Alpha (%)	0.92
Tracking Error (%)	6.64
Batting Average (%)	44.55
Up Capture (%)	82.76
Down Capture (%)	85.87

Return Histogram Since Jan 1998

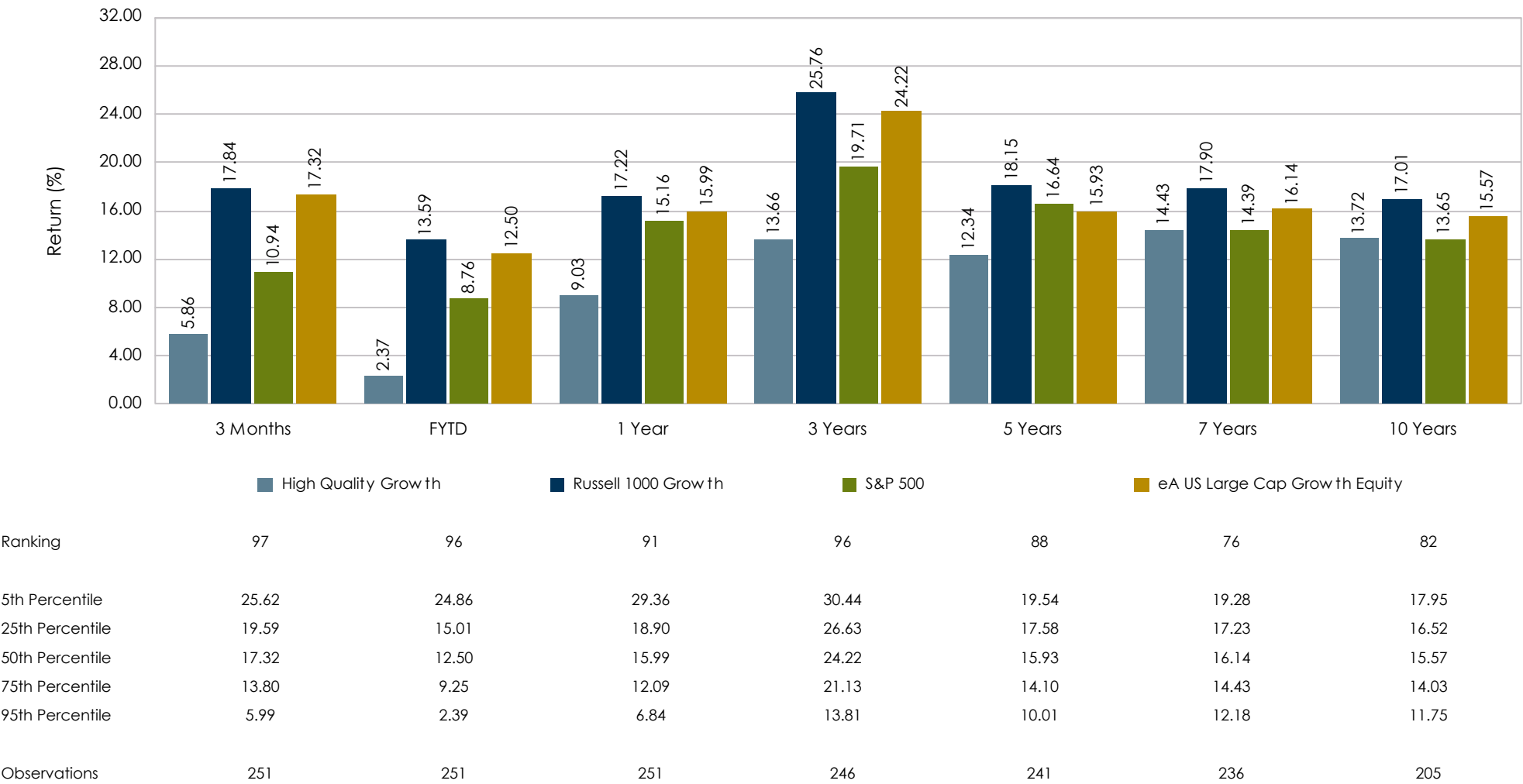


Return Analysis Since Jan 1998

	High Quality Growth	Russell 1000 Growth
Number of Months	330	330
Highest Monthly Return (%)	13.30	14.80
Lowest Monthly Return (%)	-17.56	-17.61
Number of Positive Months	201	198
Number of Negative Months	129	132
% of Positive Months	60.91	60.00

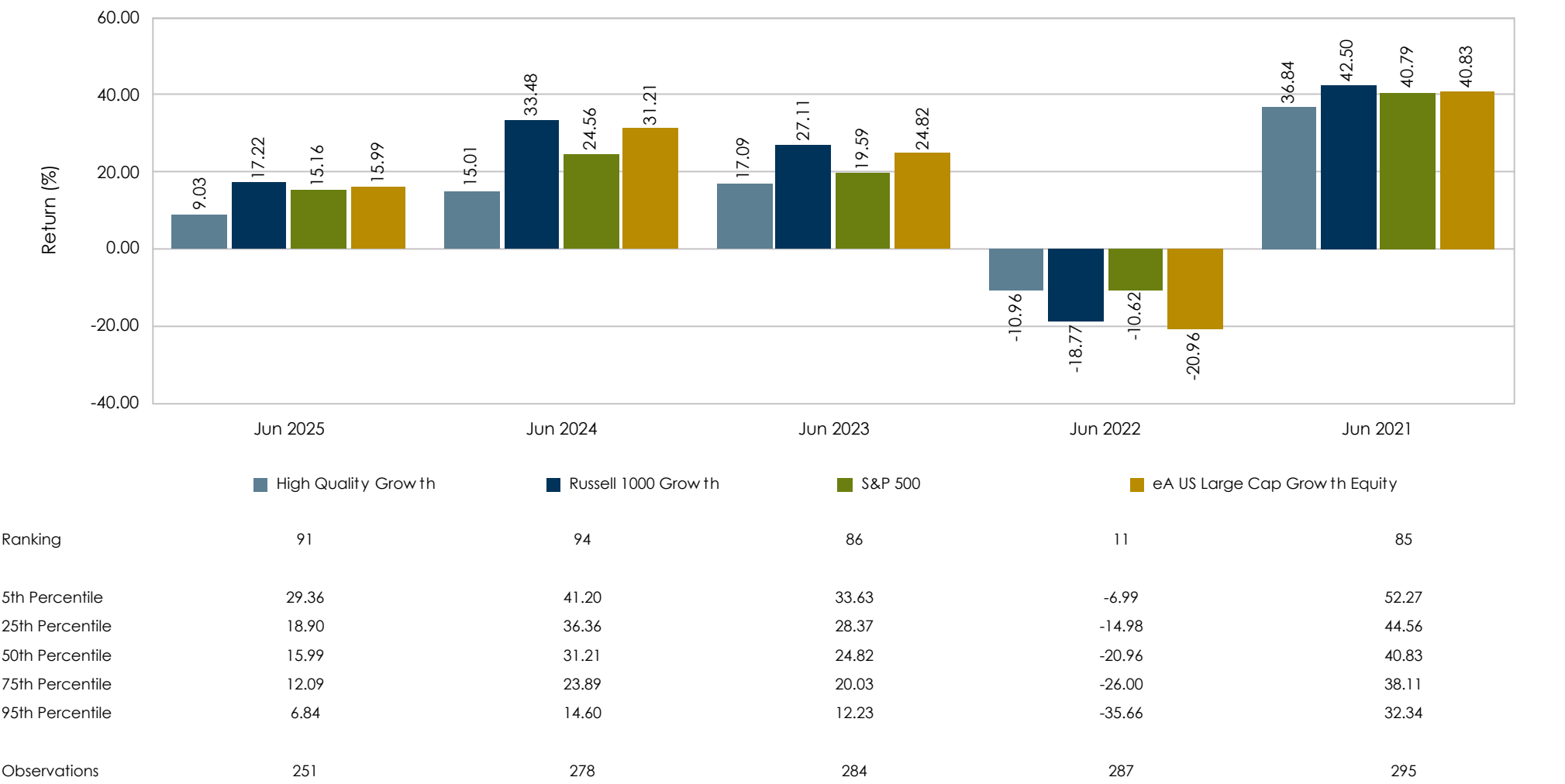
Atlanta Capital High Quality Growth

For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Atlanta Capital High Quality Growth
For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Atlanta Capital High Quality Growth

For the Periods Ending June 30, 2025

Portfolio Sector Allocations	Maximum	Actual Portfolio	Within Guidelines?	Comments
------------------------------	---------	------------------	--------------------	----------

Maximum sector concentration shall be no more than 30% in any one sector as defined by the Standard & Poor's GICS.

Communication Services	30.00%	4.80%	Yes	
Consumer Discretionary	30.00%	5.33%	Yes	
Consumer Staples	30.00%	2.76%	Yes	
Energy	30.00%	0.00%	Yes	
Financials	30.00%	22.76%	Yes	
Health Care	30.00%	17.27%	Yes	
Industrials	30.00%	10.09%	Yes	
Information Technology	30.00%	21.73%	Yes	
Materials	30.00%	8.05%	Yes	
Real Estate	30.00%	3.66%	Yes	
Utilities	30.00%	0.00%	Yes	

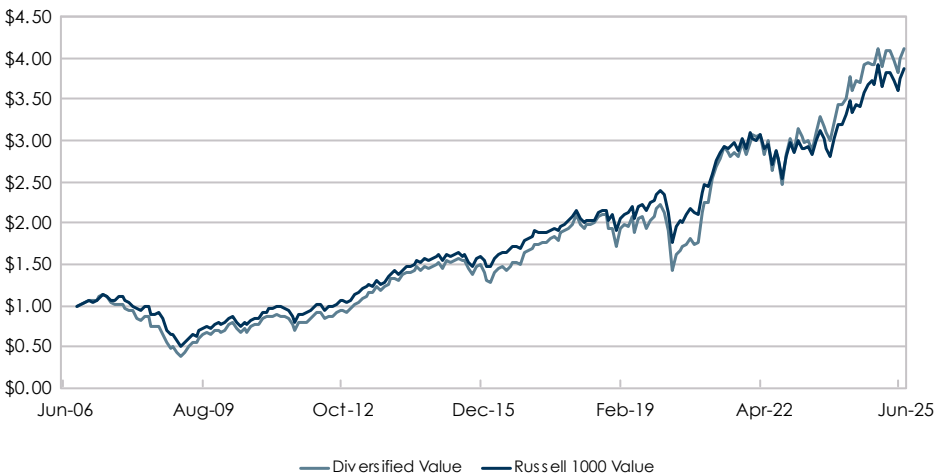
Allocation	Max. %	Actual Portfolio	Within Guidelines?	Comments
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A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.0%	3.55%	Yes	
A maximum of 5% of the portfolio may be invested in the securities of an individual corporation.	5.0%	4.82%	Yes	Largest Position Noted
A maximum of 10% of the portfolio, valued at market, may be invested in convertible issues (must have rating of Baa/BBB or better).	10.0%	0.00%	Yes	
A maximum of 5% of the portfolio, valued at market, may be invested in any one convertible issuer.	5.0%	0.00%	Yes	
Maximum of 20% of the Portfolio, valued at market, may be invested in ADRs and common stocks of corporations organized under the laws of any country other than the United States, which are traded primarily on a US stock exchange.	20.0%	5.40%	Yes	

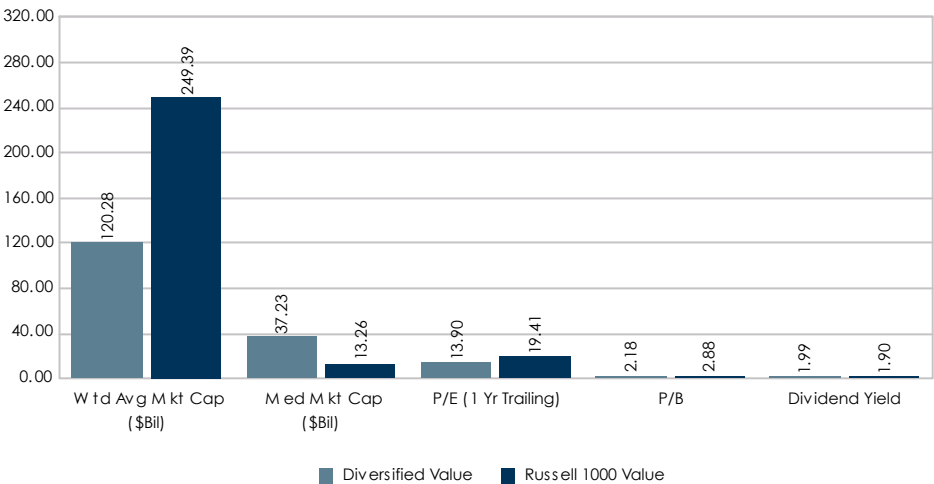
Hotchkis & Wiley Diversified Value

For the Periods Ending June 30, 2025

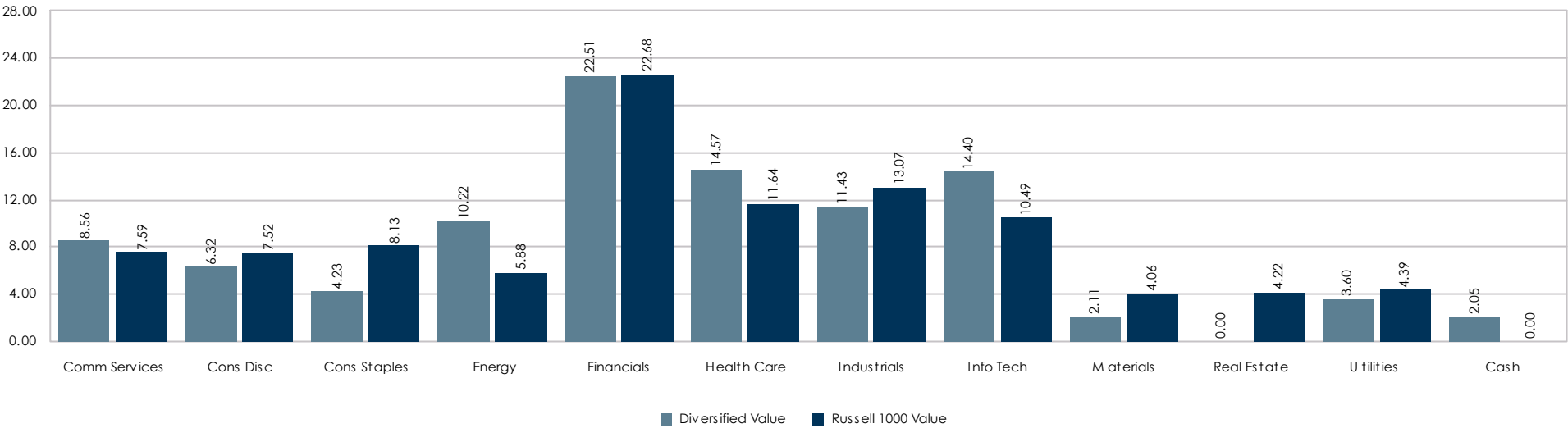
Growth of a Dollar



Characteristics



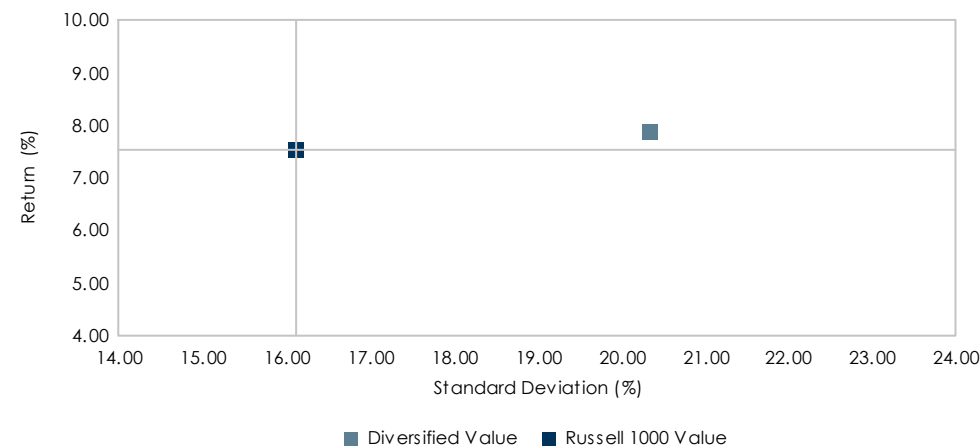
Sector Allocation



Hotchkis & Wiley Diversified Value

For the Periods Ending June 30, 2025

Risk / Return Since Nov 2006



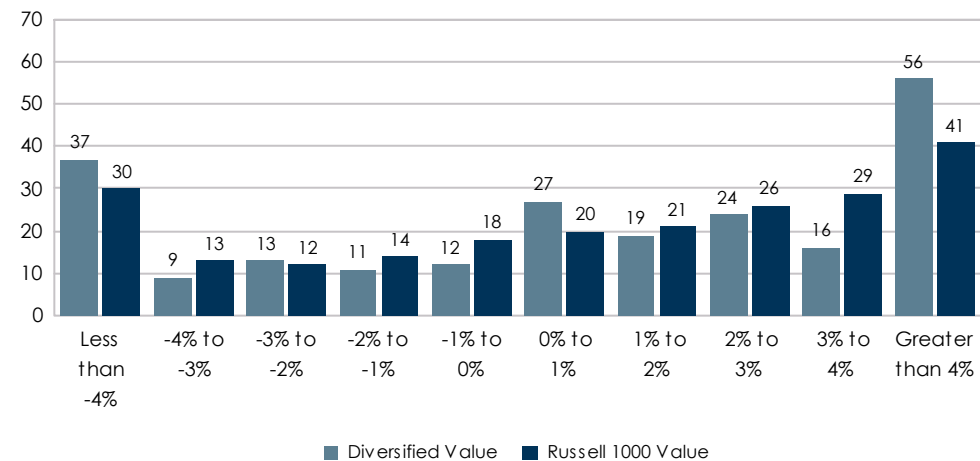
Portfolio Statistics Since Nov 2006

	Diversified Value	Russell 1000 Value
Return (%)	7.88	7.52
Standard Deviation (%)	20.33	16.12
Sharpe Ratio	0.32	0.38

Benchmark Relative Statistics

Beta	1.20
R Squared (%)	91.20
Alpha (%)	-0.64
Tracking Error (%)	6.88
Batting Average (%)	54.91
Up Capture (%)	117.78
Down Capture (%)	113.45

Return Histogram Since Nov 2006

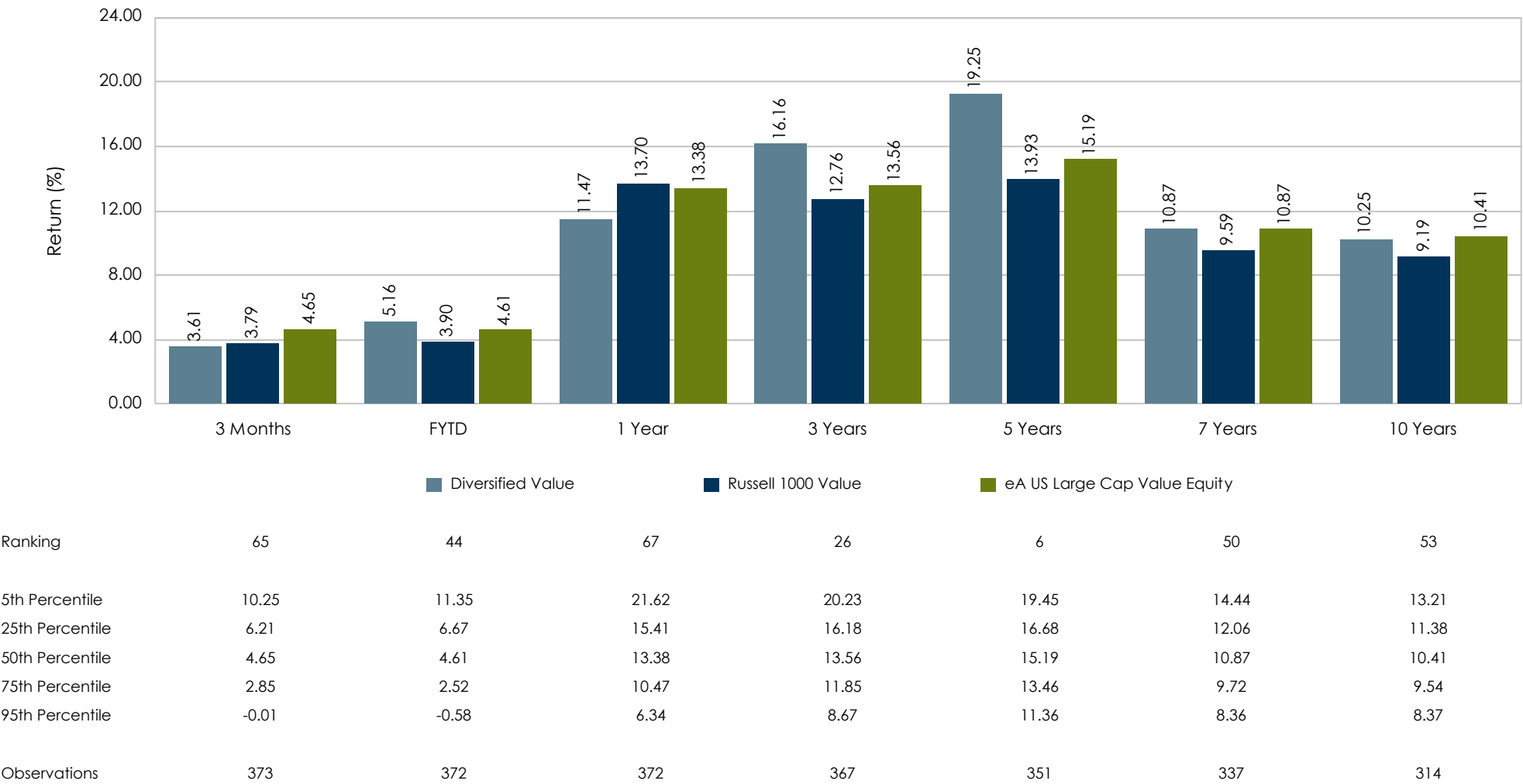


Return Analysis Since Nov 2006

	Diversified Value	Russell 1000 Value
Number of Months	224	224
Highest Monthly Return (%)	20.73	13.45
Lowest Monthly Return (%)	-24.98	-17.31
Number of Positive Months	142	137
Number of Negative Months	82	87
% of Positive Months	63.39	61.16

Hotchkis & Wiley Diversified Value

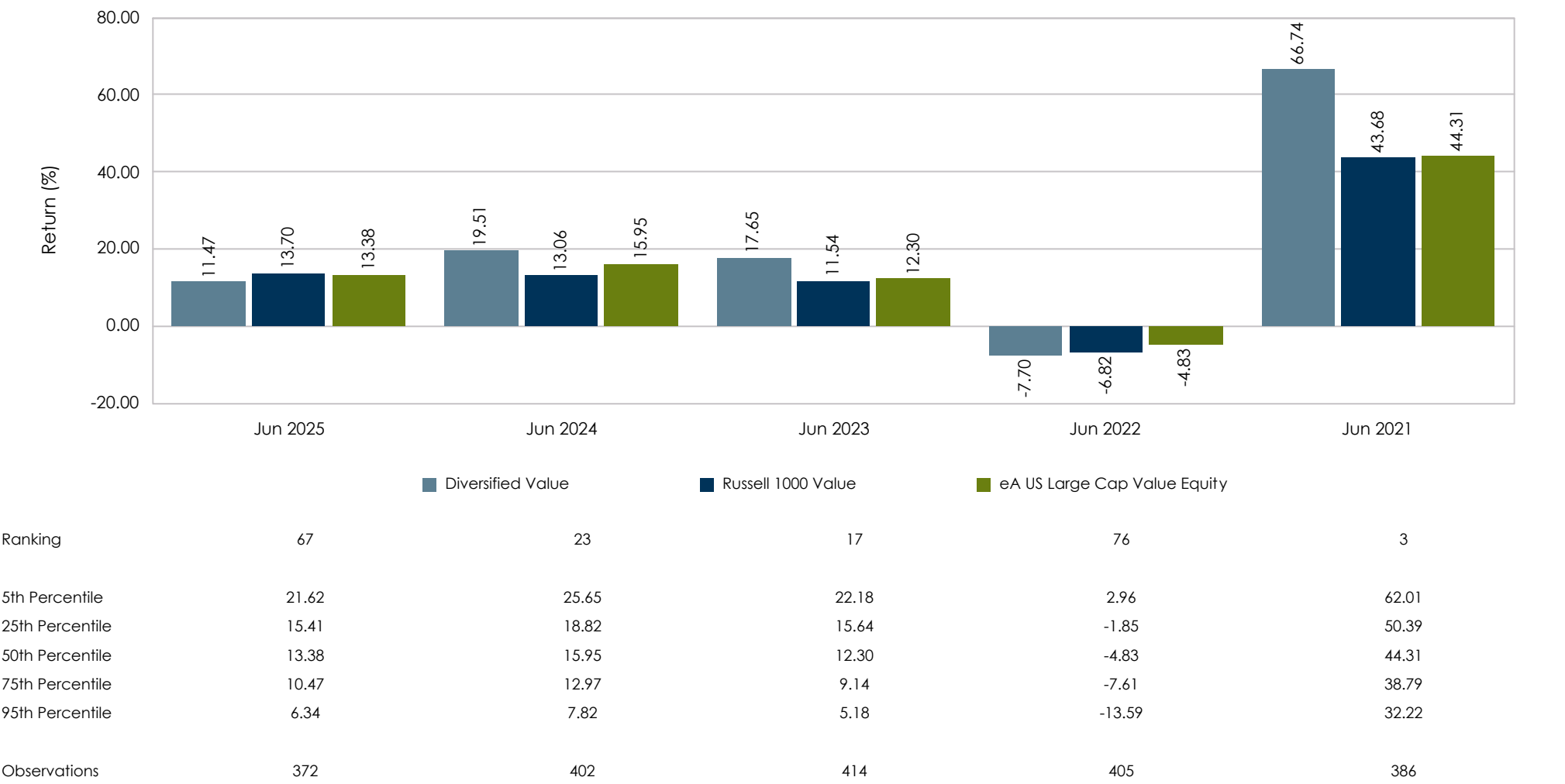
For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Hotchkis & Wiley Diversified Value

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Hotchkis & Wiley Diversified Value

For the Periods Ending June 30, 2025

Portfolio Sector Allocations	Maximum	Actual Portfolio	Within Guidelines?	Comments
Maximum sector concentration shall be no more than 35% for any sector as defined by the Standard & Poor's GICS.				
Communication Services	35.00%	8.56%	Yes	
Consumer Discretionary	35.00%	6.32%	Yes	
Consumer Staples	35.00%	4.23%	Yes	
Energy	35.00%	10.22%	Yes	
Financials	35.00%	22.51%	Yes	
Health Care	35.00%	14.57%	Yes	
Industrials	35.00%	11.43%	Yes	
Information Technology	35.00%	14.40%	Yes	
Materials	35.00%	2.11%	Yes	
Real Estate	35.00%	0.00%	Yes	
Utilities	35.00%	3.60%	Yes	
Allocation	Max. %	Actual Portfolio	Within Guidelines?	Comments
A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.0%	2.05%	Yes	
The portfolio shall not own more than 5% of the outstanding common stock of any individual corporation.	5.0%	N/A	Yes	
A maximum of 7.5% of the portfolio may be invested in the securities of an individual corporation.	7.5%	4.95%	Yes	Largest Position Noted
A maximum of 10% of the portfolio, valued at market, may be invested in convertible issues (must have rating of Baa/BBB or better).	10.0%	0.00%	Yes	
A maximum of 5% of the portfolio, valued at market, may be invested in any one convertible issuer.	5.0%	0.00%	Yes	
A maximum of 20% of the portfolio, valued at cost, may be invested in common stocks of corporations that are organized under the laws of any country other than the United States and traded on the NYSE, AMEX, or NASDAQ.	20.0%	16.62%	Yes	

FMLvT Diversified SMID Cap Equity Portfolio

For the Periods Ending June 30, 2025

Portfolio Description	Portfolio Information
▪ Strategy Small to Mid (SMID) (Strategy change in 2010) ▪ Manager Atlanta Capital Management Company ▪ Vehicle Separately Managed Account ▪ Benchmark A blend of Russell 2500 and Russell 2000 ▪ Performance Inception Date January 2000 ▪ Fees Manager Fee - 45 bps; Admin Fee - 14.5 bps ▪ Total Expenses Approximately 62 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.

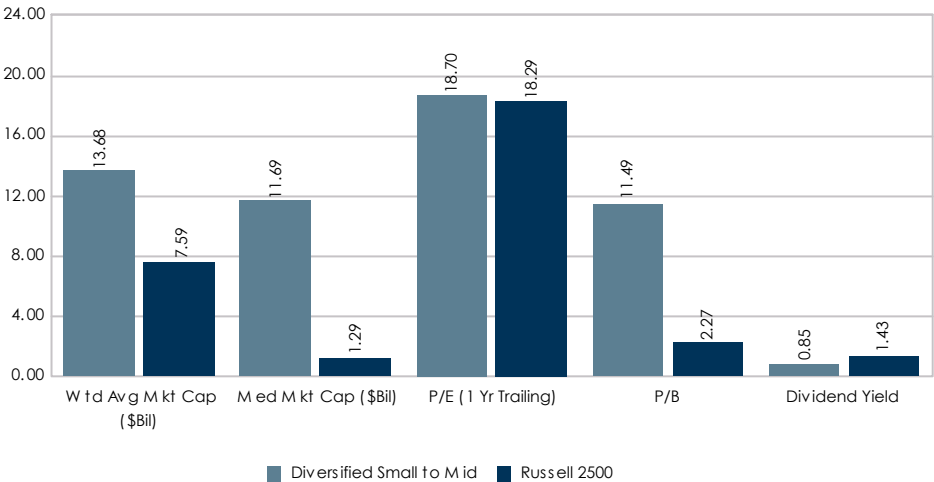
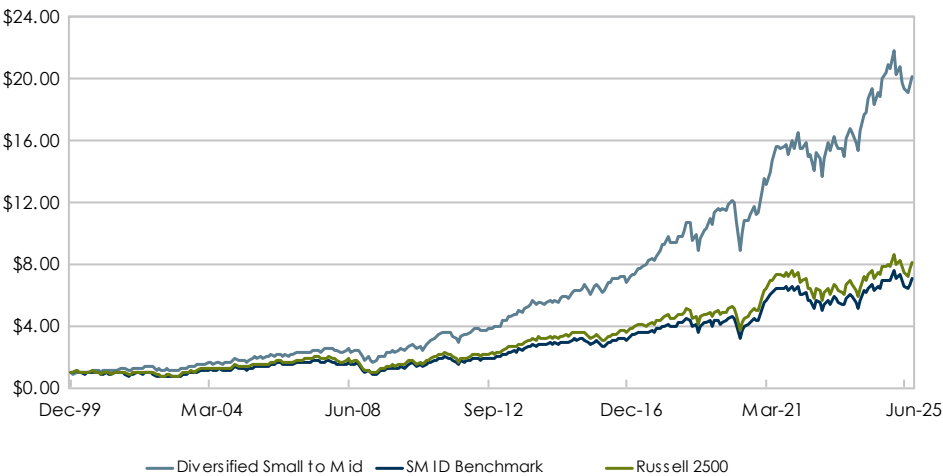
Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in small to mid cap core style common stocks of companies domiciled in the US or traded on the New York Stock Exchange. ▪ Outperform a blended index of the Russell 2500 beginning June 1, 2010 and the Russell 2000 prior to that, over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ Stock values fluctuate in response to the activities of individual companies, the general market and economic conditions. Shares of the Portfolio are neither insured nor guaranteed by any US Government agency, including the FDIC.			
		FYTD	1 Year
	Beginning Market Value	220,449	197,189
	Net Additions	-1,978	559
	Return on Investment	-8,252	12,470
	Income	1,667	2,153
	Gain/Loss	-9,919	10,317
	Ending Market Value	210,219	210,219

FMLVT Diversified SMID Cap Equity Portfolio

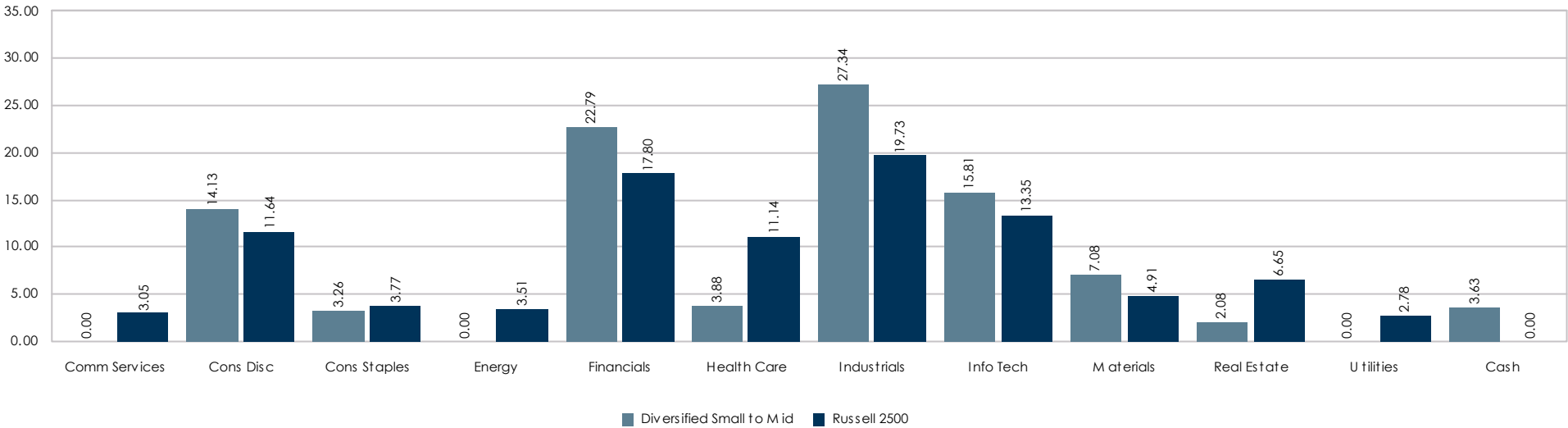
For the Periods Ending June 30, 2025

Growth of a Dollar

Characteristics



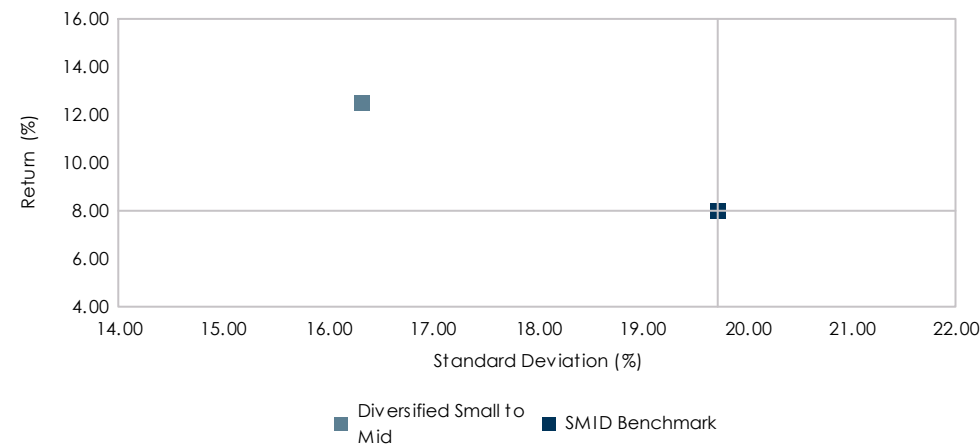
Sector Allocation



FMLt Diversified SMID Cap Equity Portfolio

For the Periods Ending June 30, 2025

Risk / Return Since Jan 2000



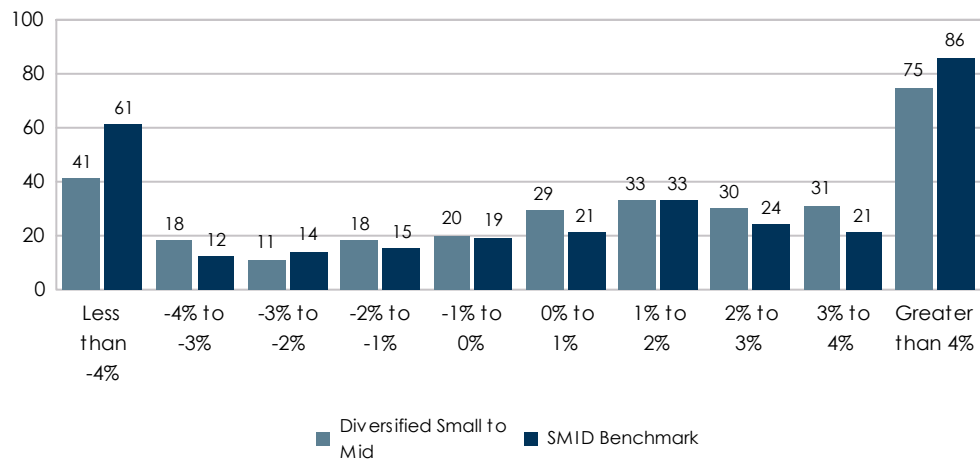
Portfolio Statistics Since Jan 2000

	Diversified Small to Mid	SMID Benchmark
Return (%)	12.48	7.99
Standard Deviation (%)	16.32	19.73
Sharpe Ratio	0.65	0.31

Benchmark Relative Statistics

Beta	0.76
R Squared (%)	85.40
Alpha (%)	5.92
Tracking Error (%)	7.78
Batting Average (%)	52.94
Up Capture (%)	84.59
Down Capture (%)	72.09

Return Histogram Since Jan 2000

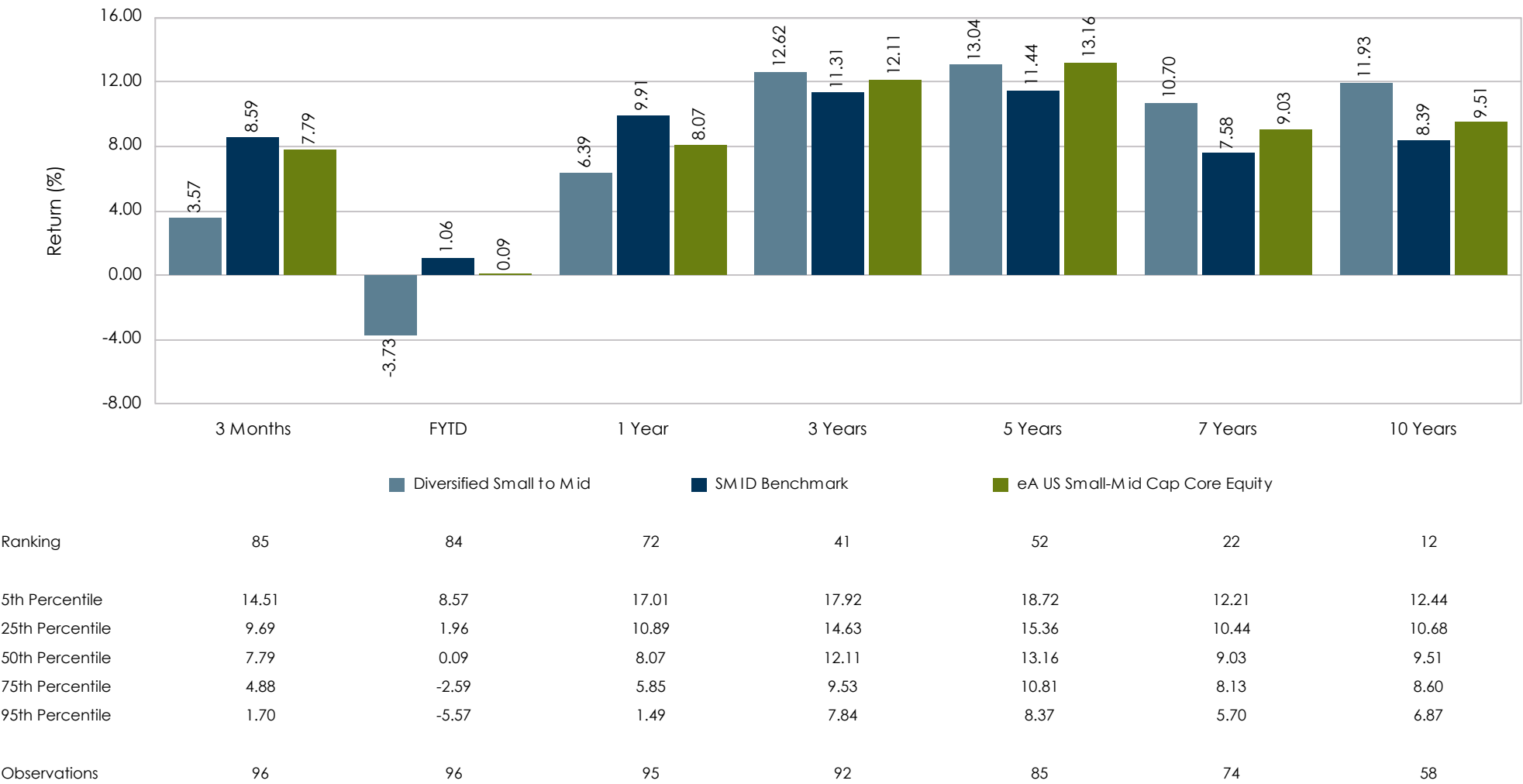


Return Analysis Since Jan 2000

	Diversified Small to Mid	SMID Benchmark
Number of Months	306	306
Highest Monthly Return (%)	15.00	16.51
Lowest Monthly Return (%)	-17.49	-21.70
Number of Positive Months	198	185
Number of Negative Months	108	121
% of Positive Months	64.71	60.46

FMLt Diversified SMID Cap Equity Portfolio

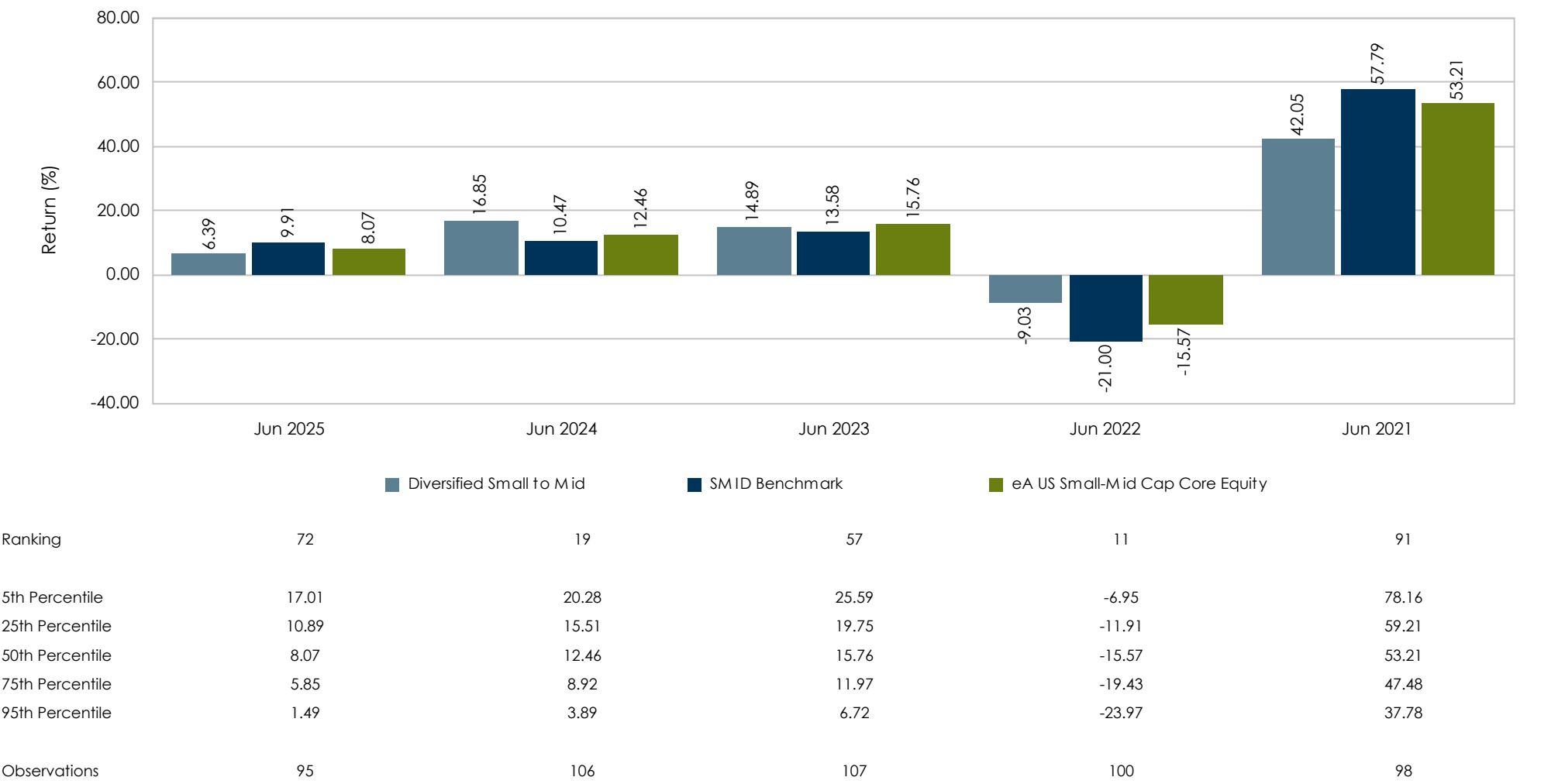
For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Diversified SMID Cap Equity Portfolio

For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines
Diversified Small to Mid (SMID) Cap Equity Portfolio

For the Periods Ending June 30, 2025

Portfolio Sector Allocations	Maximum	Actual Portfolio	Within Guidelines?	Comments
Maximum sector concentration shall be no more than 30% in any one sector				
Communication Services	30.00%	0.00%	Yes	
Consumer Discretionary	30.00%	14.13%	Yes	
Consumer Staples	30.00%	3.26%	Yes	
Energy	30.00%	0.00%	Yes	
Financials	30.00%	22.79%	Yes	
Health Care	30.00%	3.88%	Yes	
Industrials	30.00%	27.34%	Yes	
Information Technology	30.00%	15.81%	Yes	
Materials	30.00%	7.08%	Yes	
Real Estate	30.00%	2.08%	Yes	
Utilities	30.00%	0.00%	Yes	
Allocation	Max. %	Actual Portfolio	Within Guidelines?	Comments
A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.00%	3.63%	Yes	
A maximum of 5% of the portfolio may be invested in the securities of an individual corporation.	5.00%	4.52%	Yes	Largest Position Noted
A maximum of 10% of the portfolio, valued at market, may be invested in convertible issues (must have rating of Baa/BBB or better).	10.00%	0.00%	Yes	
A maximum of 5% of the portfolio, valued at market, may be invested in any one convertible issuer.	5.00%	0.00%	Yes	
A maximum of 10% of the portfolio, valued at cost, may be invested in common stocks of corporations that are organized under the laws of any country other than the United States and traded on the NYSE, AMEX, or NASDAQ.	10.00%	0.00%	Yes	

FMIVT International Equity Portfolio

For the Periods Ending June 30, 2025

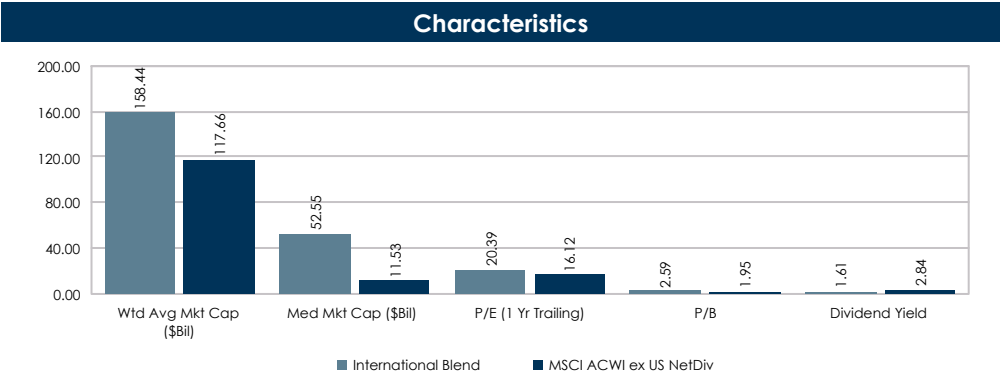
Portfolio Description	Portfolio Information
▪ Strategy International Equity ▪ Manager Ninety One Asset Management and Allspring Global Investments ▪ Vehicle Non-Mutual Commingled ▪ Benchmark MSCI ACWI ex US ▪ Performance Inception Date June 2005 (Manager changes April 2011, October 2014 & October 2017) ▪ Fees Manager Fee - 43 bps; Admin Fee - 14.5 bps ▪ Total Expenses Approximately 59 bps	▪ Minimum initial investment \$50,000 ▪ Minimum subsequent investments \$5,000 ▪ Minimum redemption \$5,000 ▪ The Portfolio is open once a month, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ▪ The Portfolio is valued on the last business day of the month. ▪ The Administrator must have advance written notification of Member contributions or redemptions 5 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
▪ Invests in developed and emerging markets outside the US. Maintains approximately equal weightings to both growth and value securities through a systematic rebalancing process. ▪ Outperform the MSCI ACWI ex US NetDiv over a complete market cycle (usually 3 to 5 years). ▪ Rank above median in a relevant peer group universe. ▪ Stock values fluctuate in response to the activities of individual companies, the general market and economic conditions. Investments in foreign securities generally pose greater risk than domestic securities.			
		FYTD	1 Year
	Beginning Market Value	232,932	221,997
	Net Additions	3,937	6,609
	Return on Investment	40,007	48,271
	Ending Market Value	276,876	276,876

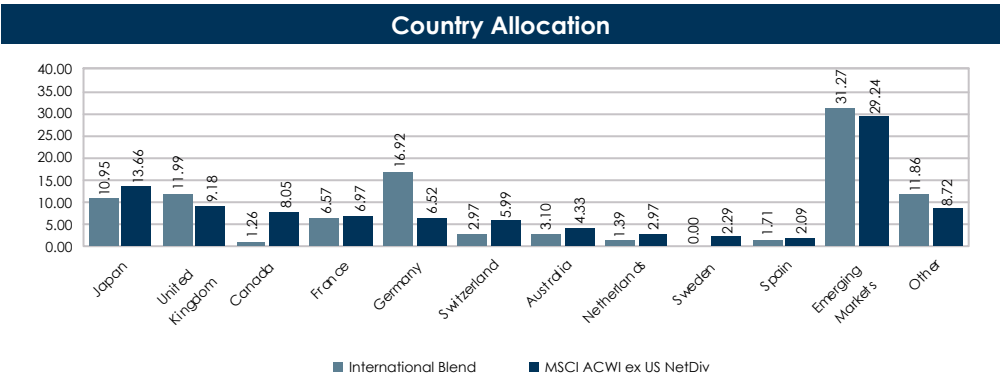
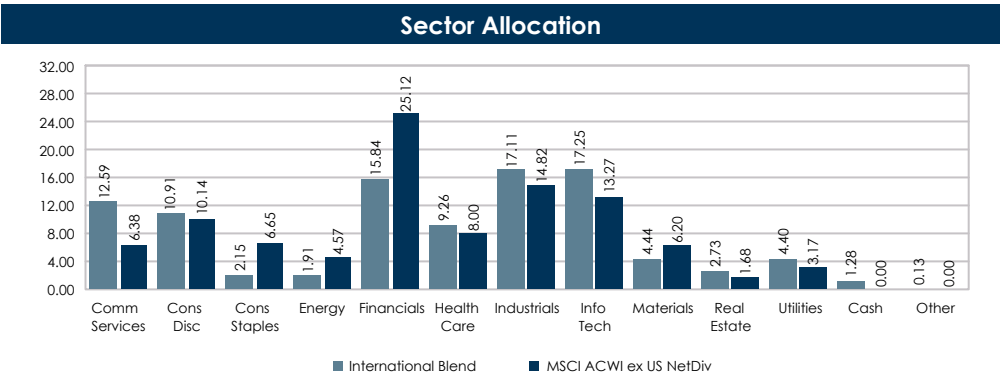
FMlvt International Equity Portfolio

For the Periods Ending June 30, 2025

Manager Allocation		
Name	Market Value (\$000s)	Allocation (%)
Total International Blend	276,876	100.00
Ninety One International Equity Fund	256,588	92.67
Allspring EM Large/Mid Cap Eq	20,288	7.33



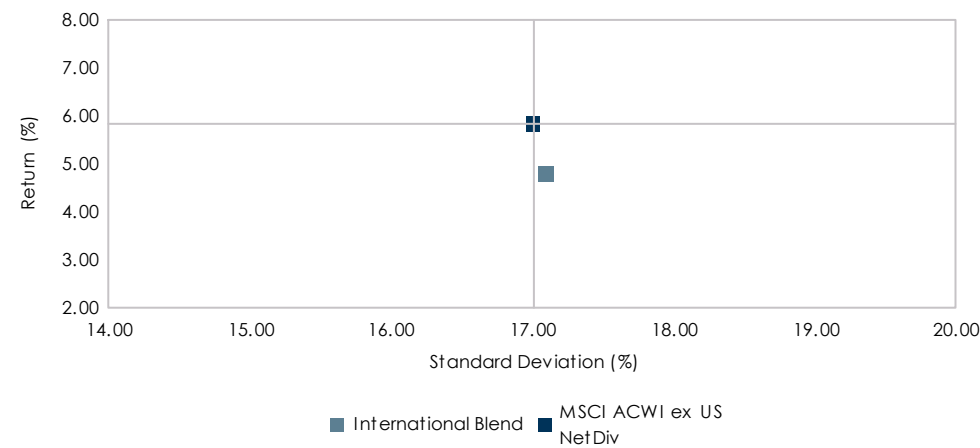
Dollar Growth Summary (\$000s)		
	FYTD	1 Year
Beginning Market Value	232,932	221,997
Net Additions	3,937	6,609
Return on Investment	40,007	48,271
Ending Market Value	276,876	276,876



FMIvT International Equity Portfolio

For the Periods Ending June 30, 2025

Risk / Return Since Jul 2005



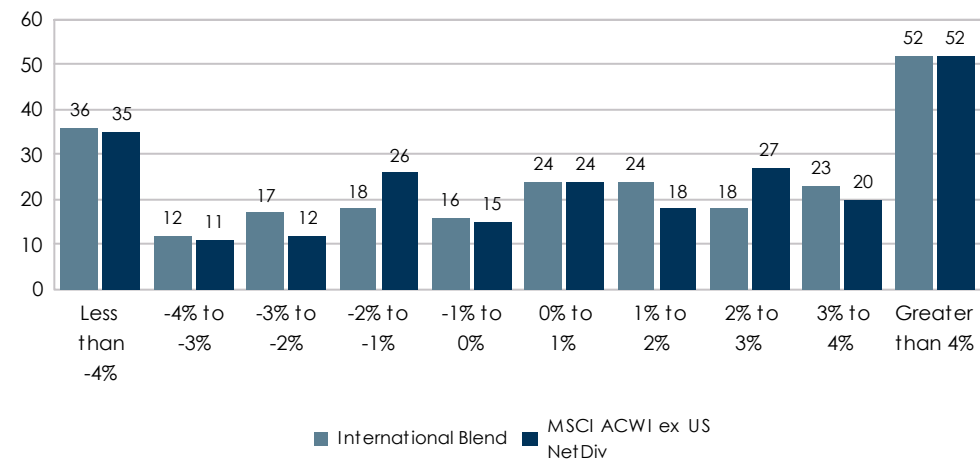
Portfolio Statistics Since Jul 2005

	International Blend	MSCI ACWI ex US NetDiv
Return (%)	4.81	5.83
Standard Deviation (%)	17.10	17.00
Sharpe Ratio	0.19	0.25

Benchmark Relative Statistics

Beta	0.98
R Squared (%)	94.72
Alpha (%)	-0.80
Tracking Error (%)	3.95
Batting Average (%)	48.33
Up Capture (%)	96.27
Down Capture (%)	100.78

Return Histogram Since Jul 2005

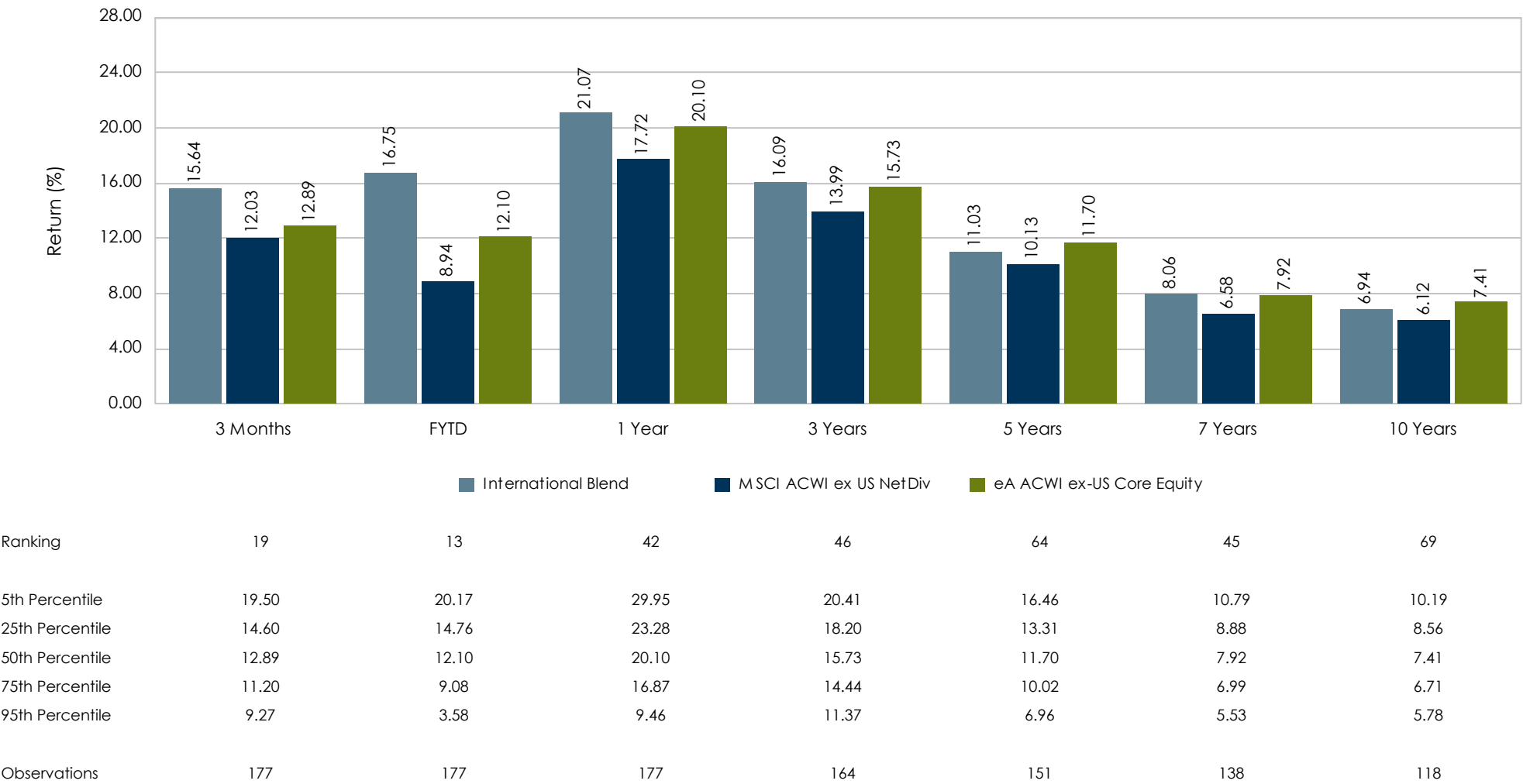


Return Analysis Since Jul 2005

	International Blend	MSCI ACWI ex US NetDiv
Number of Months	240	240
Highest Monthly Return (%)	12.03	13.63
Lowest Monthly Return (%)	-21.48	-22.02
Number of Positive Months	141	141
Number of Negative Months	99	99
% of Positive Months	58.75	58.75

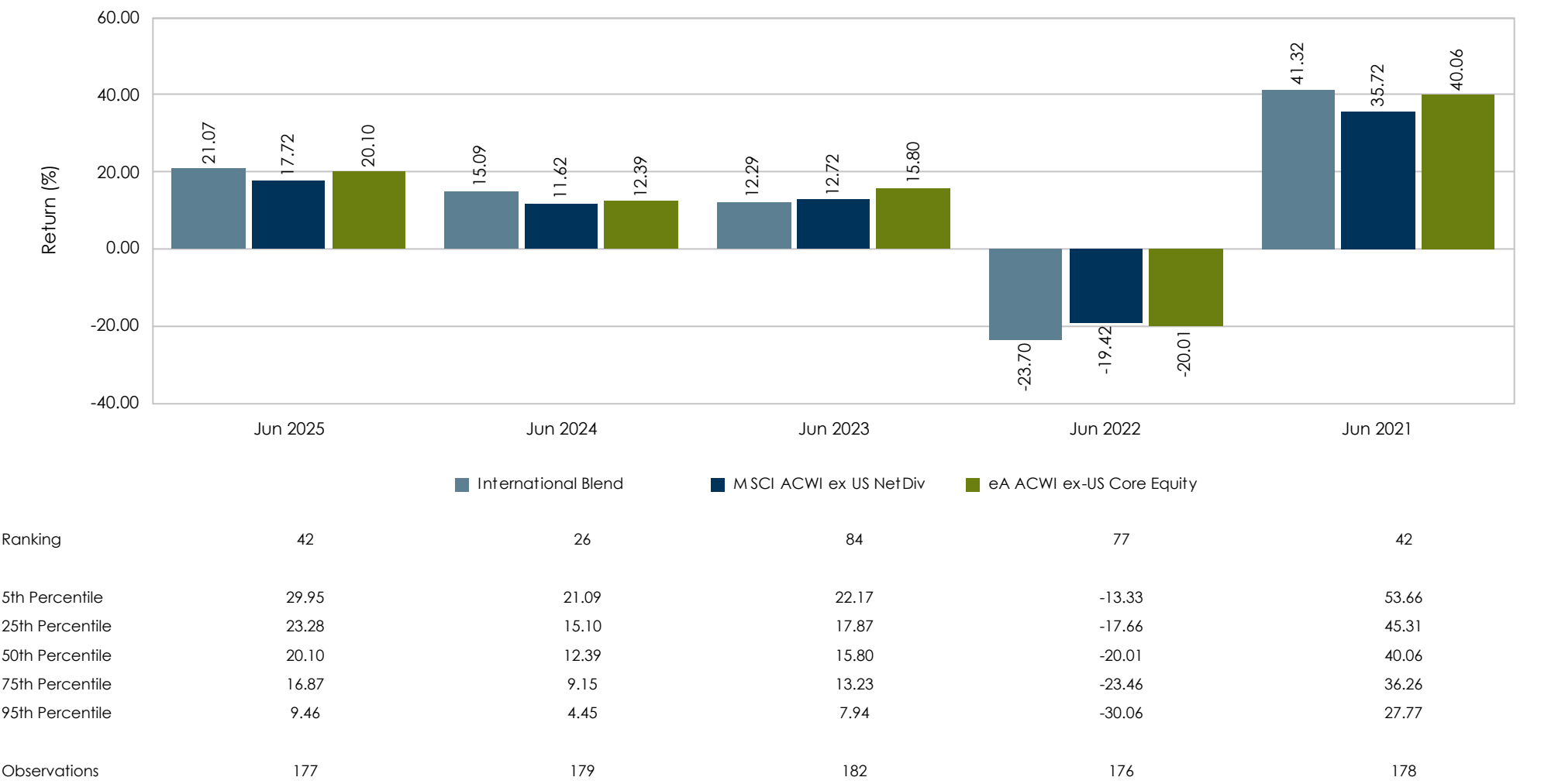
FMIvT International Equity Portfolio

For the Periods Ending June 30, 2025



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT International Equity Portfolio
For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Investment Guidelines**International Equity Portfolio***For the Periods Ending June 30, 2025*

Manager Allocations	Target %	Range%	Actual Portfolio	Within Guidelines?	Comments
Ninety One International Equity Fund	90.00%	80% - 100%	92.67%	Yes	
Allspring EM Large/Mid Cap Eq Fund	10.00%	0% - 20%	7.33%	Yes	
Allocation	Max. %		Actual Portfolio	Within Guidelines?	Comments
A maximum of 10% of the portfolio, valued at market, may be invested in cash.	10.0%		1.28%	Yes	

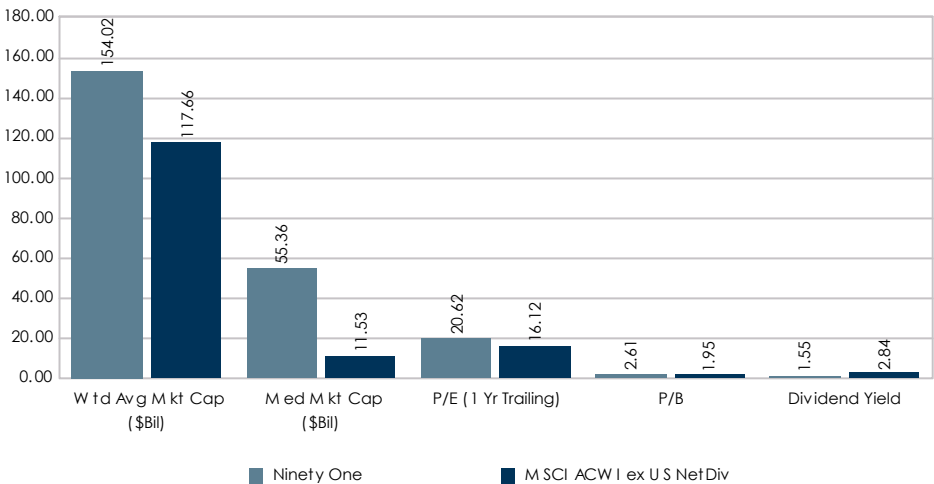
Ninety One International Equity Fund

For the Periods Ending June 30, 2025

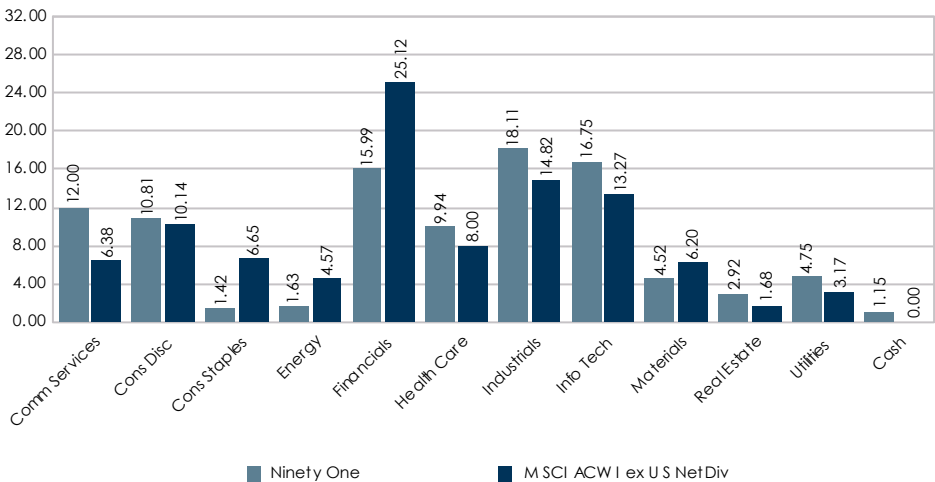
Growth of a Dollar



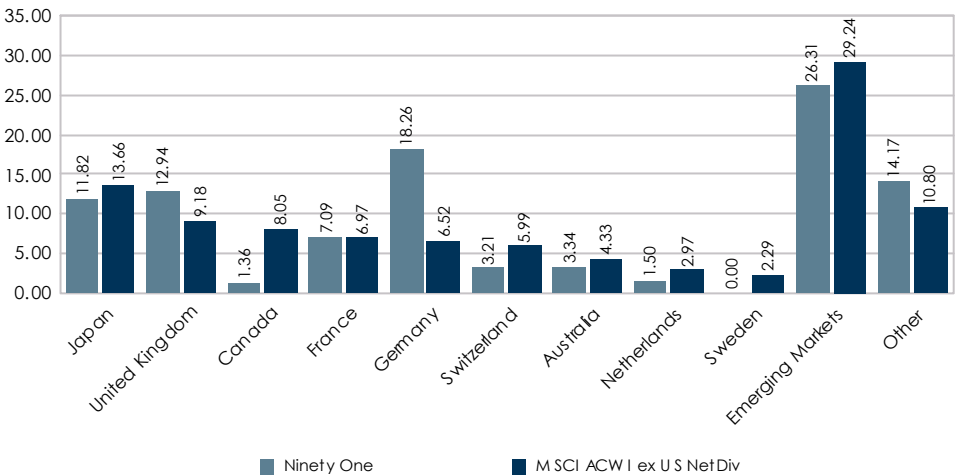
Characteristics



Sector Allocation



Country Allocation

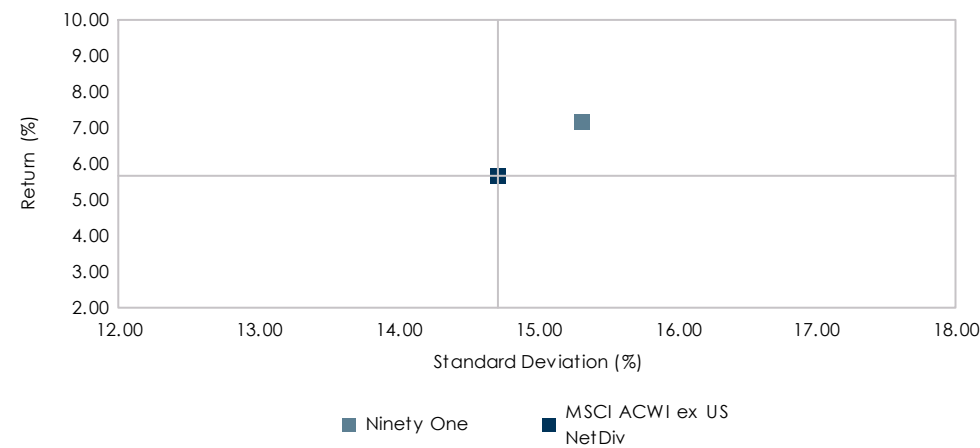


Characteristic and allocation charts represents data of the Ninety-One International Equity (Non-Mutual Commingled).

Ninety One International Equity Fund

For the Periods Ending June 30, 2025

Risk / Return Since Oct 2014



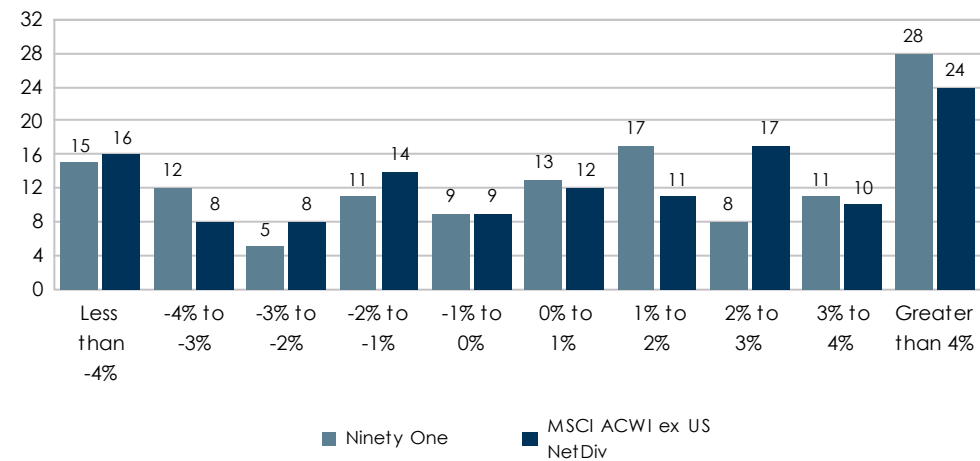
Portfolio Statistics Since Oct 2014

	Ninety One	MSCI ACWI ex US NetDiv
Return (%)	7.15	5.68
Standard Deviation (%)	15.31	14.71
Sharpe Ratio	0.35	0.26

Benchmark Relative Statistics

Beta	1.00
R Squared (%)	92.36
Alpha (%)	1.48
Tracking Error (%)	4.23
Batting Average (%)	55.81
Up Capture (%)	103.56
Down Capture (%)	96.67

Return Histogram Since Oct 2014

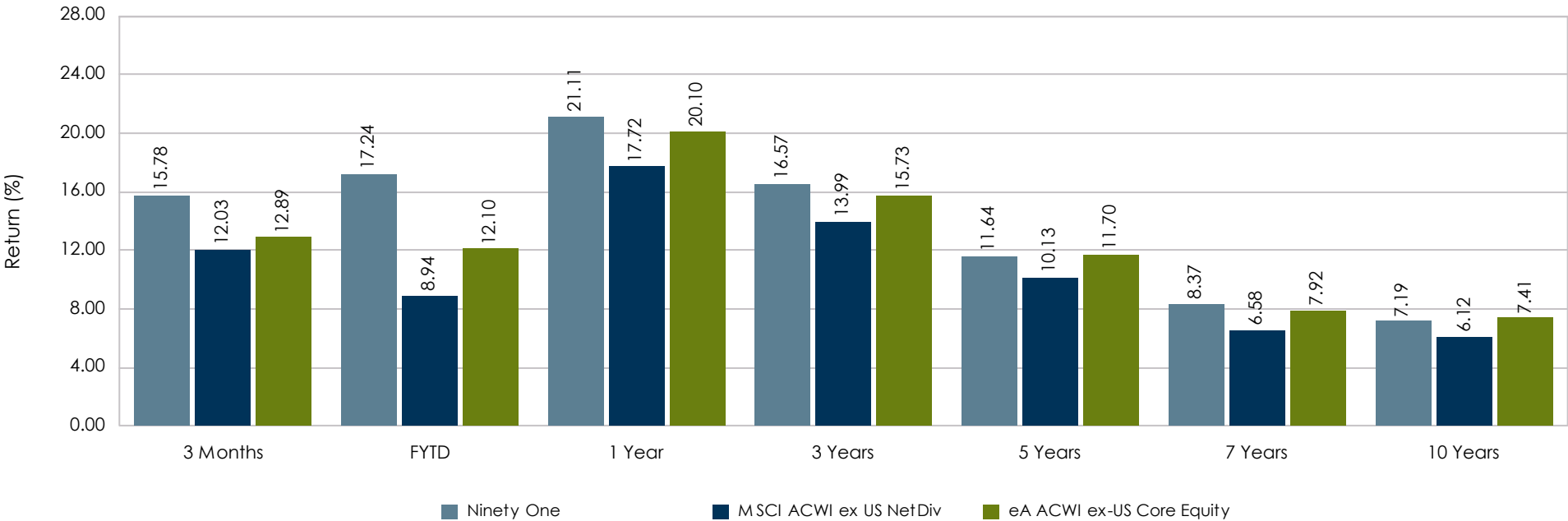


Return Analysis Since Oct 2014

	Ninety One	MSCI ACWI ex US NetDiv
Number of Months	129	129
Highest Monthly Return (%)	12.16	13.45
Lowest Monthly Return (%)	-16.65	-14.48
Number of Positive Months	77	74
Number of Negative Months	52	55
% of Positive Months	59.69	57.36

Ninety One International Equity Fund

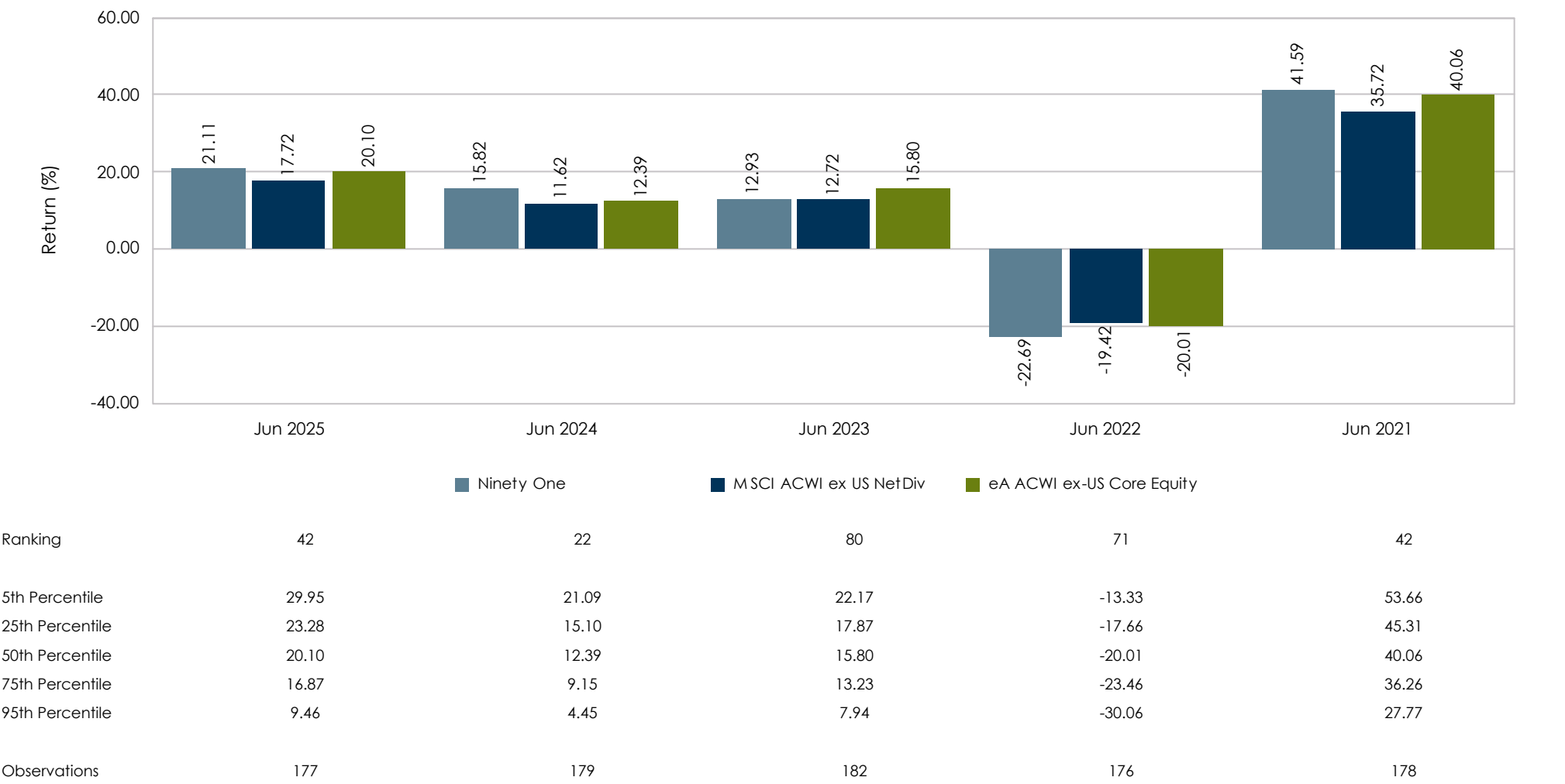
For the Periods Ending June 30, 2025



Ranking	19	11	42	40	52	40	58
5th Percentile	19.50	20.17	29.95	20.41	16.46	10.79	10.19
25th Percentile	14.60	14.76	23.28	18.20	13.31	8.88	8.56
50th Percentile	12.89	12.10	20.10	15.73	11.70	7.92	7.41
75th Percentile	11.20	9.08	16.87	14.44	10.02	6.99	6.71
95th Percentile	9.27	3.58	9.46	11.37	6.96	5.53	5.78
Observations	177	177	177	164	151	138	118

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Ninety One International Equity Fund
For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

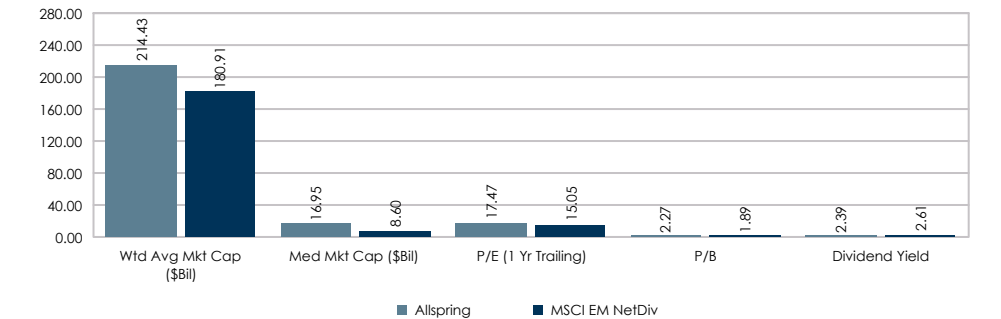
Allspring EM Large/Mid Cap Eq

For the Periods Ending June 30, 2025

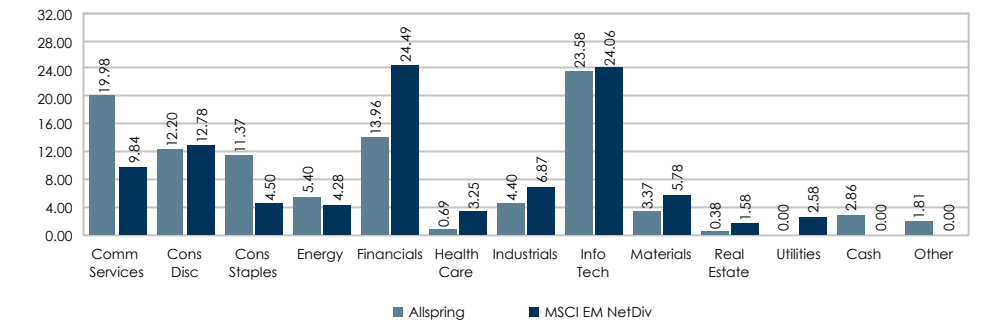
Account Description

- **Strategy** Emerging Markets Equity
- **Vehicle** Non-Mutual Commingled
- **Benchmark** MSCI EM NetDiv
- **Performance Inception Date** November 2017

Characteristics



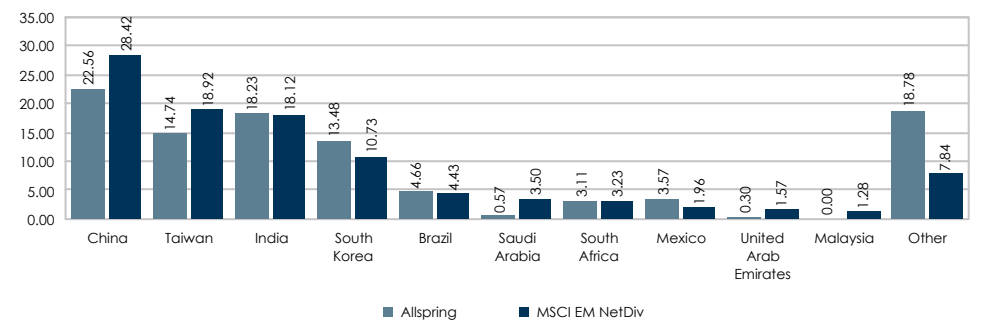
Sector Allocation



Dollar Growth Summary (\$000s)

	FYTD	1 Year
Beginning Market Value	18,312	16,851
Net Additions	-4	-5
Return on Investment	1,980	3,443
Ending Market Value	20,288	20,288

Country Allocation

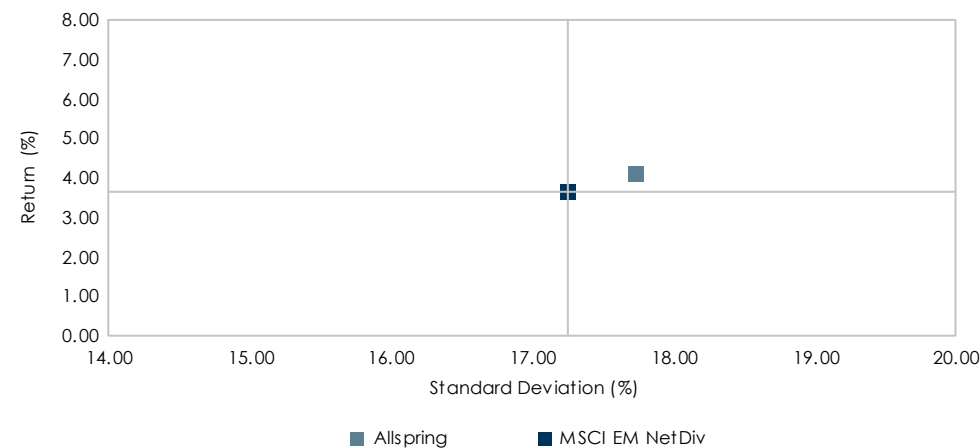


Characteristic and allocation charts represents data of the Allspring Emerging Markets Large/Mid Cap Fund (Non-Mutual Commingled).

Allspring EM Large/Mid Cap Eq

For the Periods Ending June 30, 2025

Risk / Return Since Nov 2017



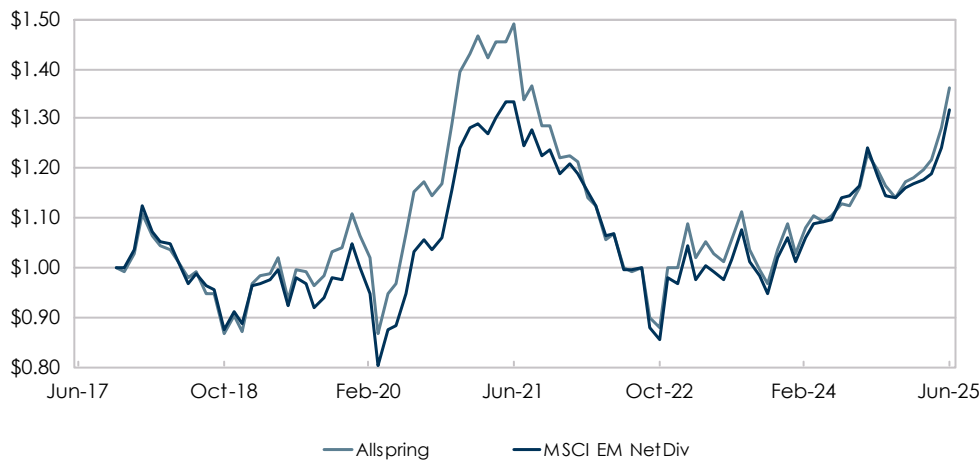
Portfolio Statistics Since Nov 2017

	Allspring	MSCI EM NetDiv
Return (%)	4.11	3.65
Standard Deviation (%)	17.73	17.25
Sharpe Ratio	0.09	0.07

Benchmark Relative Statistics

Beta	1.00
R Squared (%)	94.89
Alpha (%)	0.52
Tracking Error (%)	4.01
Batting Average (%)	55.43
Up Capture (%)	103.69
Down Capture (%)	101.08

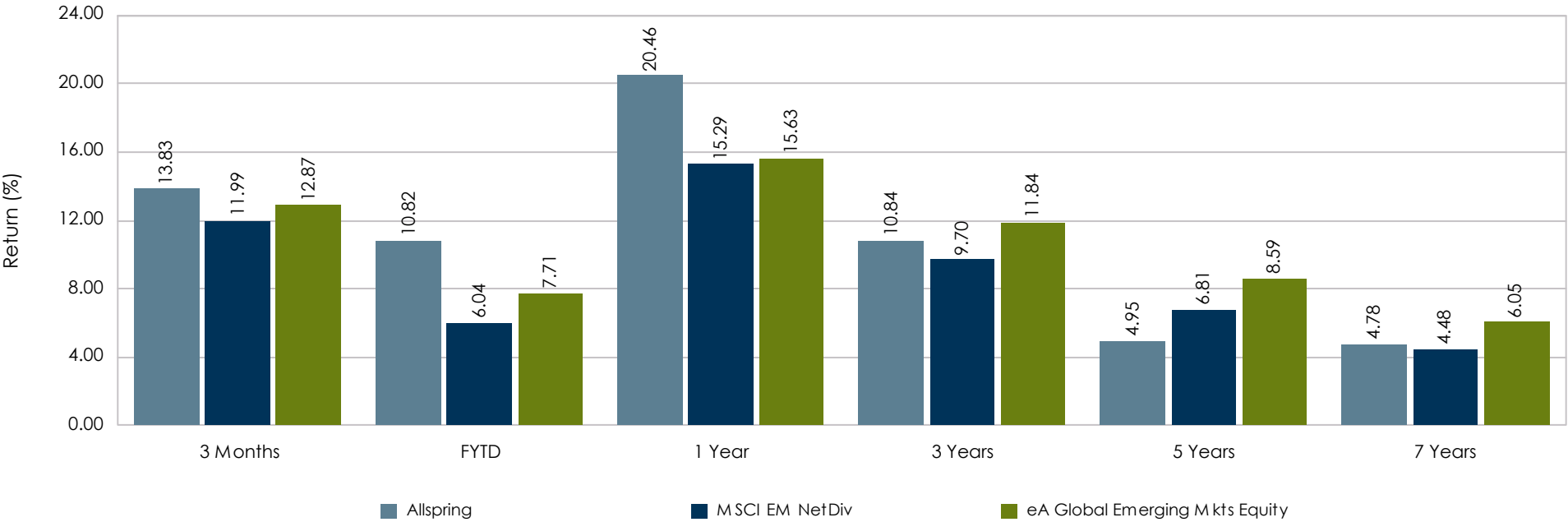
Growth of a Dollar Since Nov 2017



Return Analysis Since Nov 2017

	Allspring	MSCI EM NetDiv
Number of Months	92	92
Highest Monthly Return (%)	14.02	14.83
Lowest Monthly Return (%)	-14.87	-15.40
Number of Positive Months	50	52
Number of Negative Months	42	40
% of Positive Months	54.35	56.52

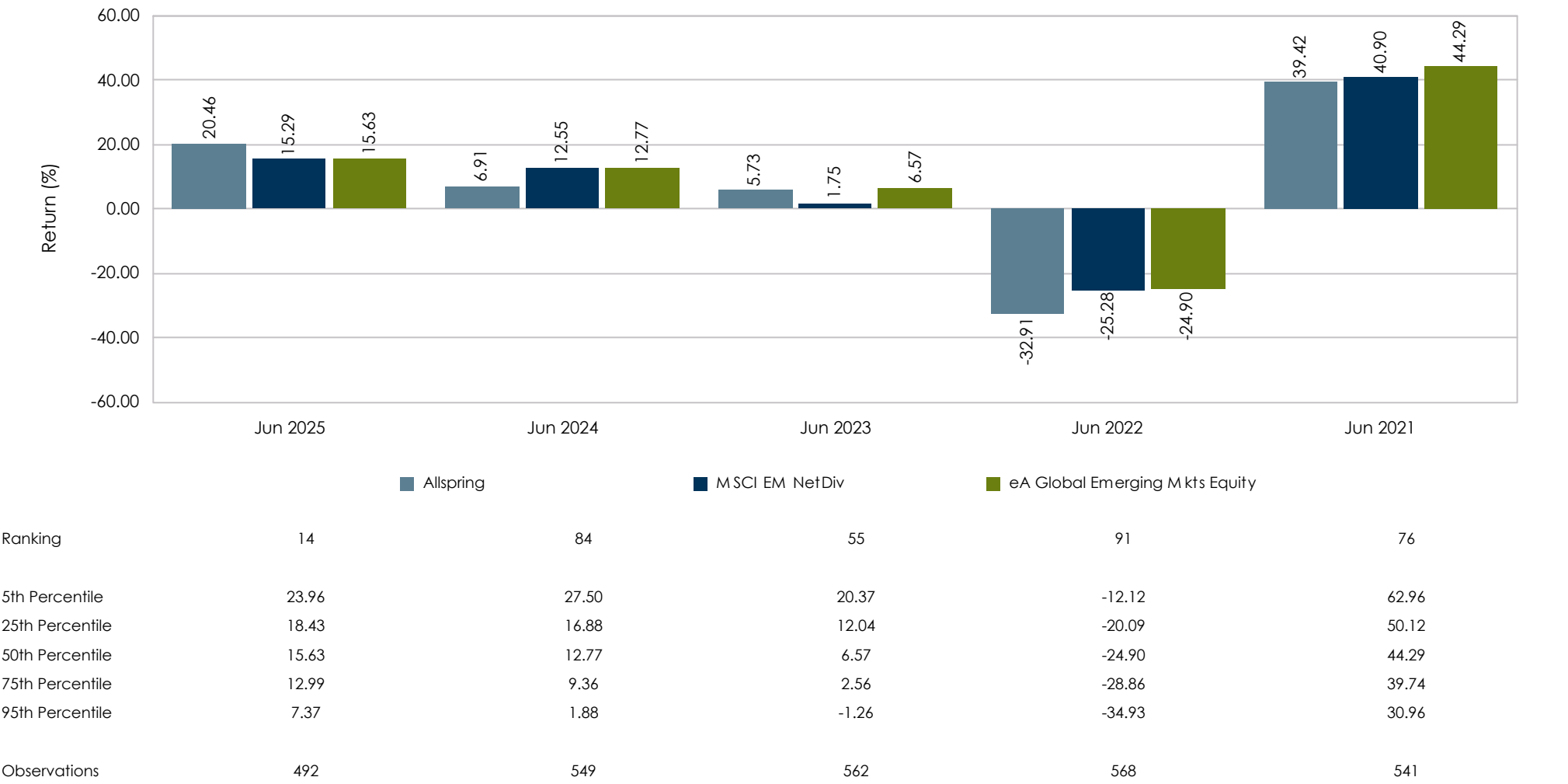
Allspring EM Large/Mid Cap Eq
For the Periods Ending June 30, 2025



Ranking	34	20	14	58	91	75
5th Percentile	18.86	14.87	23.96	19.77	16.61	10.66
25th Percentile	14.49	10.21	18.43	14.70	11.75	7.58
50th Percentile	12.87	7.71	15.63	11.84	8.59	6.05
75th Percentile	11.54	5.60	12.99	9.53	6.57	4.77
95th Percentile	8.59	0.94	7.37	6.86	3.94	3.29
Observations	493	493	492	469	424	380

The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

Allspring EM Large/Mid Cap Eq
For the One Year Periods Ending June



The rankings represent the portfolio's returns versus a peer universe. The rankings are on a scale of 1 to 100 with 1 being the best.

FMIvT Core Real Estate Portfolio

For the Periods Ending June 30, 2025

Portfolio Description	Portfolio Information
■ Strategy Core Real Estate ■ Manager Morgan Stanley Real Estate Advisor, Inc. ■ Vehicle Non-Mutual Commingled ■ Benchmark NFI ODCE Net Index ■ Performance Inception Date April 2018 ■ Fees Manager Fees - 124 bps; Admin Fees - 14.5 bps ■ Total Expenses Approximately 141 bps	■ Minimum initial investment \$50,000 ■ Minimum subsequent investments \$5,000 ■ Minimum redemption \$5,000 or Member's entire remaining account balance if the Member's balance falls below \$50,000 ■ The Portfolio is open once a quarter, on the first business day following the Portfolio Valuation date, to accept Member contributions or redemptions. ■ The Portfolio is valued on the last business day of the calendar quarter. ■ The Administrator must have advance written notification of Member contributions or redemptions 90 days prior to the Portfolio Valuation date.

Portfolio Objectives and Constraints	Dollar Growth Summary (\$000s)		
■ Invests in real estate properties diversified by type and location. ■ Outperform the NFI ODCE Net index on an annual basis.			
		FYTD	1 Year
	Beginning Market Value	162,937	162,648
	Net Additions	-20,380	-21,020
	Return on Investment	4,261	5,192
	Ending Market Value	146,819	146,819

FMIvT Core Real Estate Portfolio

For the Periods Ending June 30, 2025

Account Description

- **Strategy** Core Real Estate
- **Vehicle** Non-Mutual Commingled
- **Benchmark** NFI ODCE Net
- **Performance Inception Date** April 2018

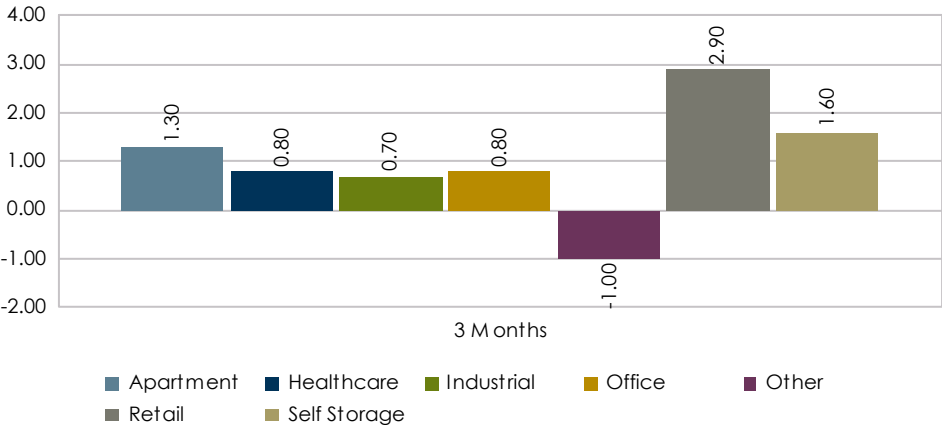
Fund Information

■ Gross Market Value	\$41,339,000,000
■ Net Market Value	\$30,460,000,000
■ Cash Balance of Fund	\$30,460,000
■ # of Properties	517
■ # of Participants	481

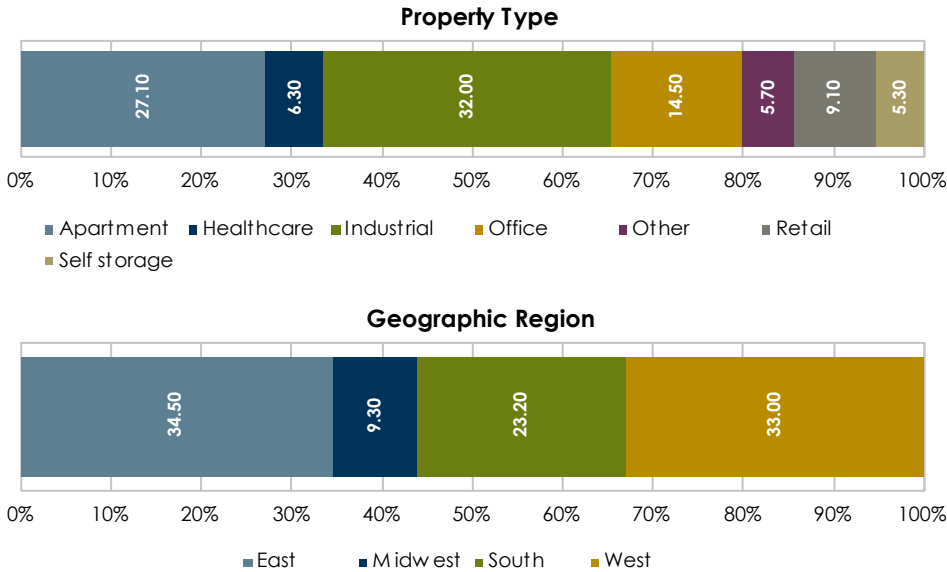
Performance Goals

- Invests in real estate properties diversified by type and location.
- Outperform the NFI ODCE Net index on an annual basis.

Returns by Property Type (%)



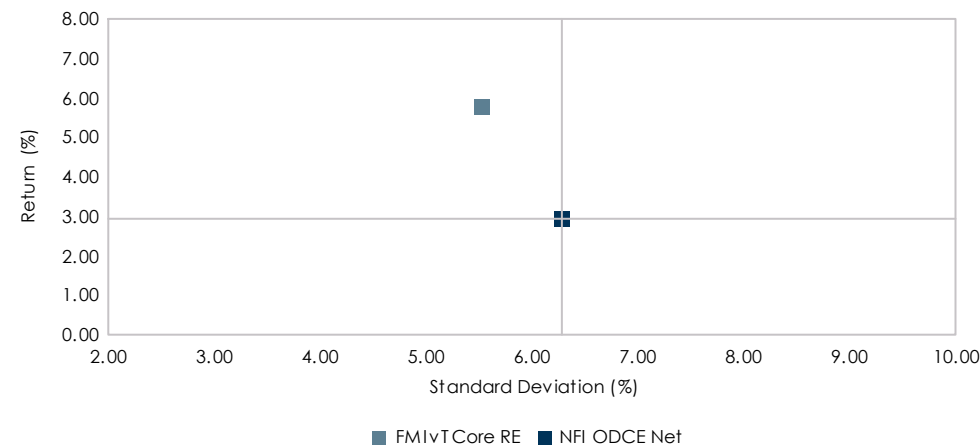
Allocations



FMIvT Core Real Estate Portfolio

For the Periods Ending June 30, 2025

Risk / Return Since Apr 2018



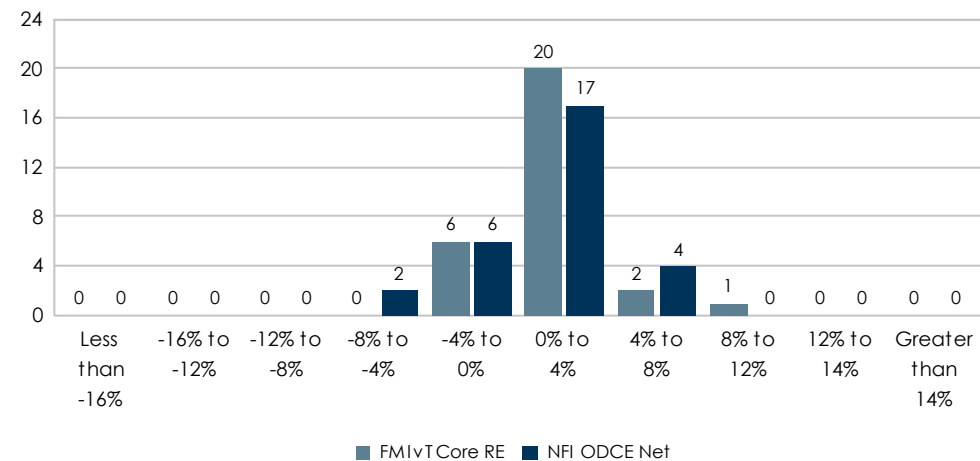
Portfolio Statistics Since Apr 2018

	FMIvT Core RE	NFI ODCE Net
Return (%)	5.79	2.93
Standard Deviation (%)	5.52	6.27
Sharpe Ratio	0.59	0.07

Benchmark Relative Statistics

Beta	0.84
R Squared (%)	91.50
Alpha (%)	0.80
Tracking Error (%)	1.89
Batting Average (%)	79.31
Up Capture (%)	116.31
Down Capture (%)	47.81

Return Histogram Since Apr 2018

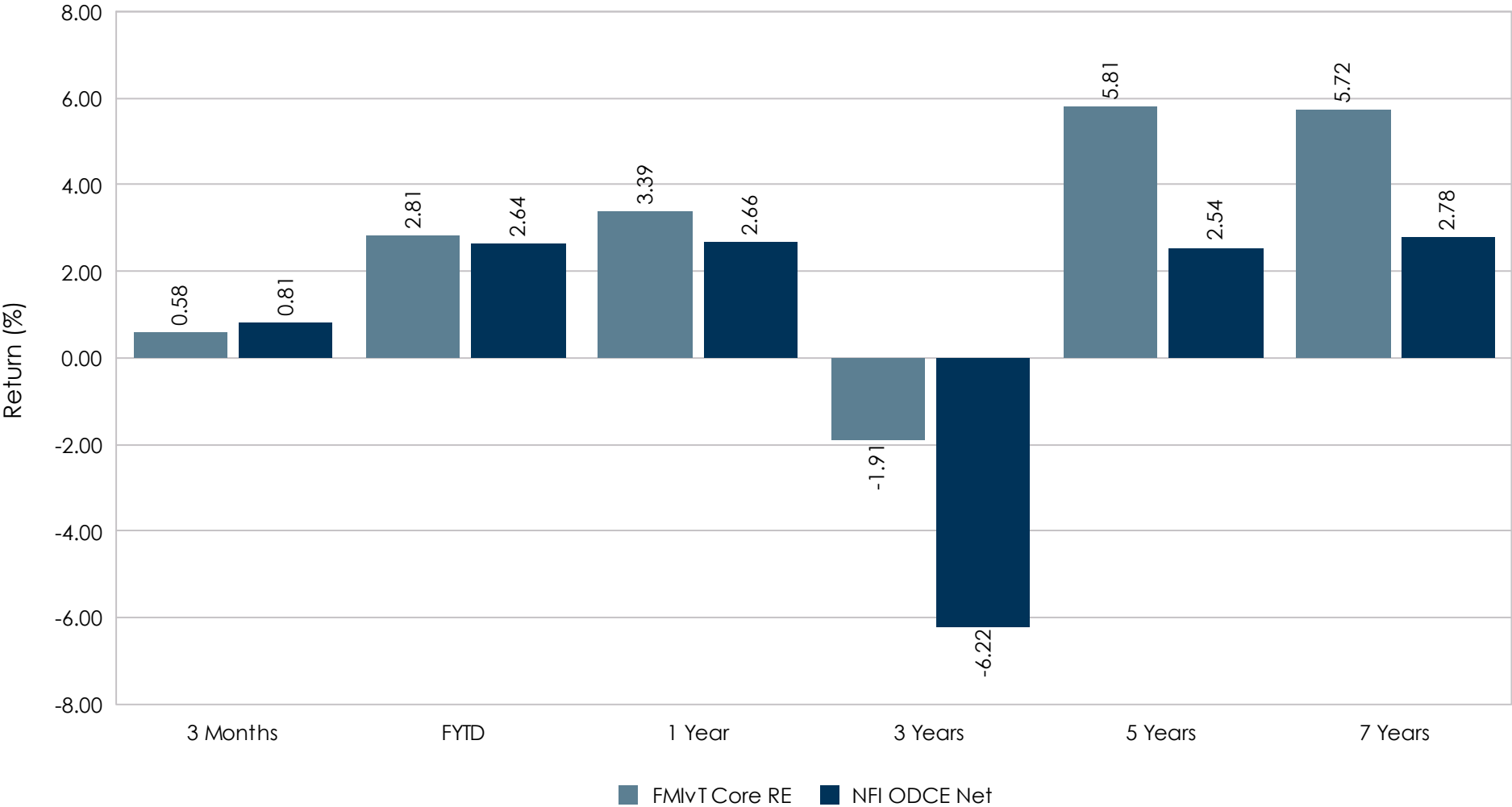


Return Analysis Since Apr 2018

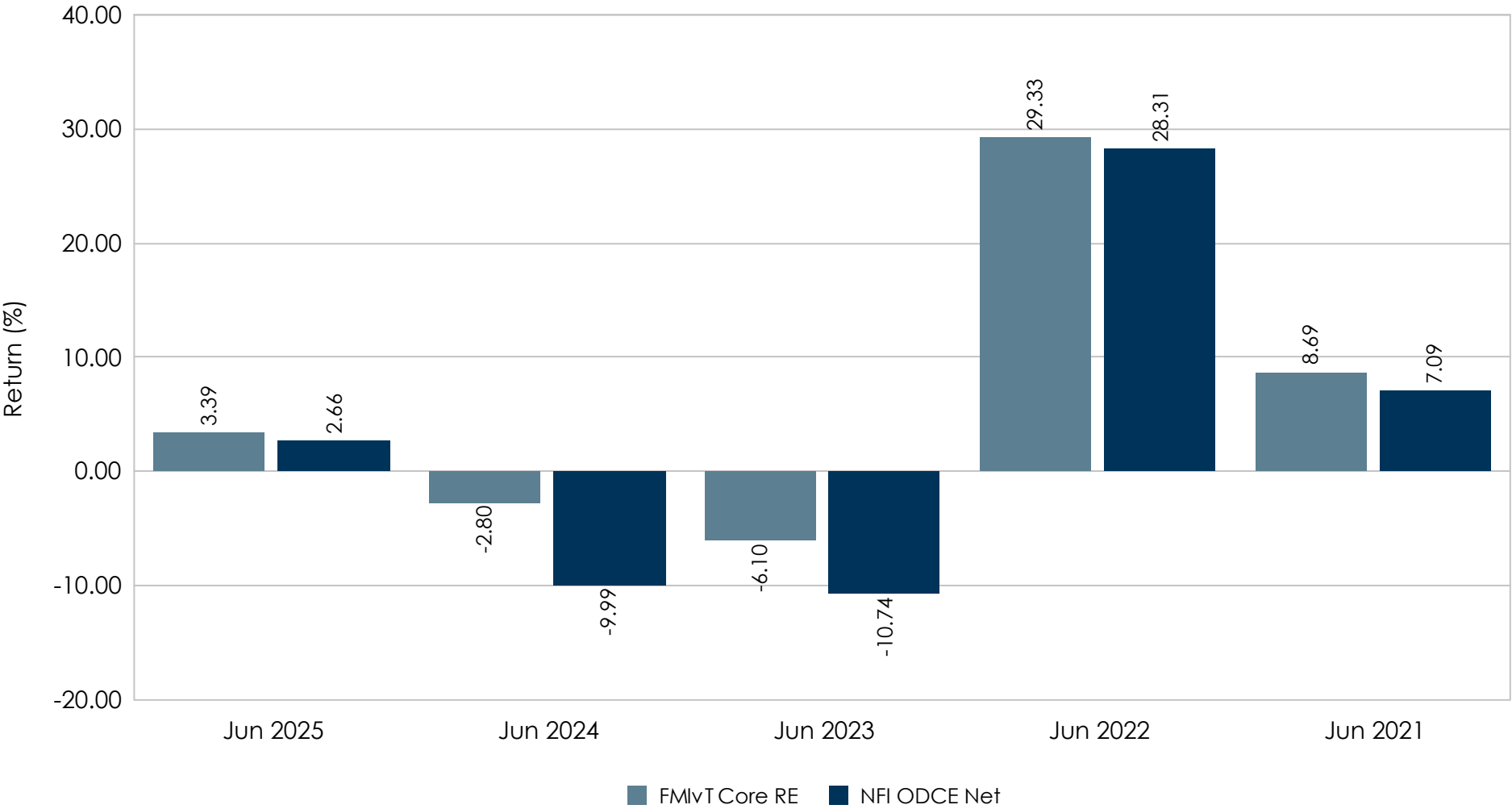
	FMIvT Core RE	NFI ODCE Net
Number of Quarters	29	29
Highest Quarterly Return (%)	9.83	7.66
Lowest Quarterly Return (%)	-3.48	-5.17
Number of Positive Quarters	23	21
Number of Negative Quarters	6	8
% of Positive Quarters	79.31	72.41

FMIvT Core Real Estate Portfolio

For the Periods Ending June 30, 2025



FMIvT Core Real Estate Portfolio
For the One Year Periods Ending June



	BUDGET	ACTUAL	ACTUAL	ACTUAL	ACTUAL
	2025-2026	2024-2025	2023-2024	2022-2023	2021-2022
General Pension					
Actuarial Fees	15,000	14,888	15,900	13,875	13,875
Administrator Fees	1,000	1,000	1,000	1,000	1,000
Quarterly Fees	42,000	38,450	33,361	31,740	33,532
Benefit Calculations	500	413	-	1,238	413
Total Expenses	58,500	54,750	50,261	47,853	48,819

Police Pension					
Administrator Fees	1,000	1,000	1,000	1,000	1,000
Quarterly Fees	9,000	8,856	7,178	6,398	7,555
Total Expenses	10,000	9,856	8,178	7,398	8,555

OPEB					
Benefits Paid	178,000	170,621	142,396	137,046	124,445
Actuarial Fees	6,000	6,000	6,000	7,500	7,500
Administrator Fees	500	500	500	500	500
Quarterly Fees	700	679	649	608	651
Total Expenses	185,200	177,799	149,545	145,654	133,097

126 S. 7th Ave
Wauchula, FL 33873



(863) 773-3131
(863) 773-0773 Fax

September 9, 2025

Florida Municipal Pension Trust Fund
P.O. Box 1757
Tallahassee, FL 32302-1757

To Whom It May Concern:

This letter is to authorize the use of the Other Post-Employment Benefits Trust to pay for the following designated monthly expenses for retirees who were hired prior to January 1, 1999:

1. Health Insurance Premium minus \$100
2. Utility Credit of \$30
3. Contributions to Health Savings Accounts (HSA)
 - a. Employee Only- \$1,600
 - b. Employee Dependents- \$3,200

These expenses are paid by the City directly to the retirees. We are asking that the Trust reimburse the city for these benefits, effective October 1, 2025.

Respectfully,

Richard K. Nadaskay
Mayor

The August PCA should be \$0.0075, the same as the prior month. The tax-exempt portion should be \$0.025, the same as the prior month.

126 S. 7th Avenue
Wauchula, FL 33873



Phone (863) 773-3535
Fax (863) 773-0773

September 8, 2025

City of Wauchula
City Commission
126 S. 7th Avenue
Wauchula, FL 33873

Dear City Commissioner:

The Commission recently approved a Request for Qualifications (RFQ) for Construction Engineering & Inspection (CEI) Services related to the Tennessee Street Resurfacing Project. This RFQ was subsequently advertised on the City's website and DemandStar. There was one proposal received by the City.

The Proposal was submitted from Chastin-Skillman, Inc. The CEI Services Selection Committee met on Thursday, September 4, 2025, at 11:30am to discuss, evaluate and rank the proposal. With Chastin-Skillman, Inc being the only submittal, they received the highest score during this process and it is the recommendation from the Committee to enter into an Agreement with Chastin-Skillman, Inc, for CEI Services for the Tennessee Street Resurfacing Project.

Sincerely,

Kyle Long
Community Development Director

Chastain Skillman

Experience and expertise of the consulting firm and its key personnel in projects similar to those in the RFQ. Corresponds to submittals No. 2, No. 3 , and No. 4.

Max 30
points

Client Surveys. Corresponds to Submittal 8.

Max 10
points

Approach to the project, management & ability to work with City staff and regulatory agencies. Corresponds to Submittal 5.

Max 20
points

Ability to creative innovative approaches. Corresponds to Submittal 5.

Max 5
points

Ability to complete projects in a timely manner. Corresponds to Submittal 4.

Max 10
points

Appropriate team member and experience. Corresponds to Submittal 3.

Max 5
points

Certified minority firm or extent of certified minority firm participation as subconsultants. Corresponds to submittal 7. See grading format for certified minorities.

Max 10
points

Location of key personnel. See grading format for location.

Max 10
points

TOTAL

Cumulative Rankings of Review Team	Chastain Skillman RFQ 25-01	Chastain Skillman RFQ 25-02
John Eason	83	83
Ward Grimes	84	84
Kyle Long	83	83
Katie Benbow	84	85
TOTAL	334	335

126 S. 7th Avenue
Wauchula, FL 33873



Phone (863) 773-3535
Fax (863) 773-0773

September 8, 2025

City of Wauchula
City Commission
126 S. 7th Avenue
Wauchula, FL 33873

Dear City Commissioner:

The Commission recently approved a Request for Qualifications (RFQ) for Construction Engineering & Inspection (CEI) Services related to the Alabama Street Resurfacing Project. This RFQ was subsequently advertised on the City's website and DemandStar. There was one proposal received by the City.

The Proposal was submitted from Chastin-Skillman, Inc. The CEI Services Selection Committee met on Thursday, September 4, 2025, at 11:30am to discuss, evaluate and rank the proposal. With Chastin-Skillman, Inc being the only submittal, they received the highest score during this process and it is the recommendation from the Committee to enter into an Agreement with Chastin-Skillman, Inc, for CEI Services for the Alabama Street Resurfacing Project.

Sincerely,

Kyle Long
Community Development Director

**INTERLOCAL AGREEMENT FOR USE OF ANIMAL SHELTER BETWEEN THE
HARDEE COUNTY SHERIFF AND THE CITY OF WAUCHULA, FLORIDA**

THIS AGREEMENT is made and entered into this ____ day of September, 2025, by and between the **HARDEE COUNTY SHERIFF** (hereafter "SHERIFF"), and the **CITY OF WAUCHULA, FLORIDA**, a municipal corporation of the State of Florida (hereafter "CITY"), as follows.

RECITALS

WHEREAS, Section 163.01, Florida Statutes, the Florida Interlocal Cooperation Act, authorizes the SHERIFF and the CITY to enter into Interlocal Agreements to ensure the most efficient use of their respective powers and to exercise jointly, any power, privilege, or authority which such agencies share in common, and which might exercise separately; and,

WHEREAS, the SHERIFF and CITY have determined that it is in the interest of the public health, safety and welfare to provide for animal control services in their respective jurisdictions; and,

WHEREAS, both the SHERIFF and CITY require the use of an animal control shelter in providing animal control services; and

WHEREAS, the SHERIFF and CITY have determined that it would be to their mutual benefit to enter into an Agreement providing for the use of a portion of the animal shelter by the CITY for a term of one (1) year; and,

WHEREAS, this Agreement may be terminated at any time by either party hereto through written notice of intent to terminate given by either party hereto the other party at least thirty (30) days prior to the date of termination.

ACCORDINGLY, in consideration of the above stated Recitals, and other good and valuable consideration the receipt and sufficiency of which are hereby acknowledged by the parties, the parties hereby agree as follows:

Section 1. Recitals. The above Recitals are true and correct and form a material part of this Agreement.

Section 2. CITY's Use of Premises and Impound Responsibilities. The SHERIFF agrees that the CITY may use the Hardee County Animal Shelter, which is owned by the Hardee County Board of County Commission and operated by the SHERIFF through interlocal agreement, for animal control purposes only. Parties agree that any pictures including animals, Animal Service Unit (ASU) facilities and/or HCSO staff shall not be published in any format without express permission from the SHERIFF or his designee. CITY agrees not to take photographs of any facilities operated by SHERIFF for publication or use other than for animal transfer or intake procedures as directed by ASU as described in Section 4 below.

When the CITY impounds an animal, they shall have a responsibility for costs of care of that animal impounded by CITY. The CITY shall pay an annual flat fee of \$12,000.00 for the

INTERLOCAL AGREEMENT FOR USE OF ANIMAL SHELTER BETWEEN THE HARDEE COUNTY SHERIFF AND THE CITY OF WAUCHULA, FLORIDA

costs of the care for animals impounded by the CITY. These costs include but are not limited to food, medicine, and associated veterinary services needed to care for the animals impounded by the CITY. This annual fee is separate from the amount contemplated under Section 7. Sharing Expenses and will be billed quarterly.

Section 3. CITY'S Maintenance of Records. The CITY agrees to maintain records of animal impoundments for animals impounded by the CITY.

Section 4. SHERIFF'S Responsibility for Care of Animals. The SHERIFF shall be solely responsible for the administration of the Shelter. This includes the management of animals as appropriate, such as feeding, cleaning, care, health, humane euthanasia, and sanitary disposal of animals while impounded at the Shelter. Animals impounded by the CITY at the Animal Shelter shall be cared for in accordance with the standards of the SHERIFF. The CITY shall follow Animal Services Unit (ASU) Supervisor instructions for animal intake. This includes notification by CITY to ASU via e-mail at AnimalServices@HardeeSO.com when animals are captured for impound by CITY outside of ASU kennel hours. The CITY must include a photo of the subject animal and any related reports with information identifying said animals, including location, owner and/or victim information prior to CITY's transfer of any animal to ASU. The SHERIFF shall coordinate all animal adoptions with ASU as the main point of contact.

Section 5. Maintenance of Premises. The CITY shall not commit, or suffer to be committed, any waste on the premises, nor shall it maintain, commit, or permit the maintenance or commission of any nuisance on the premises.

Section 6. Term; Termination. This Agreement shall become effective as described below and shall remain in effect for a period of one (1) year from the effective date. This Agreement may be terminated at any time by either party hereto through written notice of intent to terminate given by either party hereto the other party at least thirty (30) days prior to the date of termination.

Section 7. Sharing Expenses. The CITY agrees to pay the SHERIFF \$19,696.40, with quarterly payments of \$4,924.10, for daily operating costs of shelter to include boarding, feeding, cleaning, veterinary transport, and humane euthanasia and sanitary disposal of animals impounded. The CITY and SHERIFF agree to continue sharing all costs for the operation and maintenance of the Animal Shelter, including but not limited to the cost for water, electricity, insurance, license or license renewals, painting, septic repairs or replacement, fencing repairs or replacement, concrete repairs or replacement, roofing repairs or replacement, cleaning, and cleaning supplies. The parties' respective shares of the costs for maintenance of the Animal Shelter shall be sixty-seven (67%) percent for the SHERIFF, and thirty-three (33%) percent for the CITY. The SHERIFF shall invoice the CITY, on a quarterly basis, and CITY shall pay such costs in accordance with the provisions of the Florida Prompt Payment Act.

INTERLOCAL AGREEMENT FOR USE OF ANIMAL SHELTER BETWEEN THE HARDEE COUNTY SHERIFF AND THE CITY OF WAUCHULA, FLORIDA

The CITY and SHERIFF agree to a 3% annual cost adjustment, should the contract be extended to account for any increased expenses related to the operation and maintenance of the Animal Control Shelter.

Section 8. Adoption Fees, Impoundment Fees, and Fines. The SHERIFF shall receive all adoption and impoundment fees associated with any animals impounded by the CITY. The CITY shall retain all fines associated with violations of CITY ordinance regarding animals (i.e., running at large, rabies vaccinations, etc.).

Section 9. Licensing and Purchase of Controlled Substance. The SHERIFF shall be responsible for obtaining and maintaining the DEA license and pharmacy permit required for the purpose of ordering and purchasing sodium pentobarbital and for the disposal of sharps used in the humane euthanasia of animals. The SHERIFF'S Office Animal Services Unit will keep all required records for usage and administration in accordance with state laws. Only SHERIFF'S Office authorized users are to have access to the controlled substances. The SHERIFF shall be responsible for humane euthanasia of CITY animals. The SHERIFF'S Office Animal Services Unit shall keep a separate record for the sodium pentobarbital used for the CITY. The CITY shall pay the SHERIFF for such sodium pentobarbital in accordance with the provisions of the Florida Prompt Payment Act, upon invoice for such costs from the SHERIFF.

Section 10. Annual Meeting. The SHERIFF and CITY shall meet annually in March to discuss any capital improvements necessary for the operation of the Animal Shelter and to discuss budgetary issues relating to the shelter and this Interlocal Agreement for the coming fiscal year.

Section 11. Agreement to Cooperate. The SHERIFF and CITY shall exercise their best efforts to cooperate in their use of the Animal Shelter. The parties agree not to interfere or prevent each other in lawfully executing their animal control duties. Each party agrees to consider the reasonable request of the other party relating to the Animal Shelter and animal control issues.

Section 12. Cooperation in Emergency Animal Control Activities. The SHERIFF and CITY agree to make their best efforts to assist each other in working emergency animal control complaints which may arise in the incorporated and unincorporated areas of Hardee County. Any employee overtime incurred by a party's rendering aforementioned emergency assistance shall be reimbursed by the party requesting such assistance. The SHERIFF and CITY agree to work towards the adoption of uniform animal control ordinances.

Section 13. Indemnity. Each party will be solely responsible for the wrongful acts and omission of its agents, servants, and employees in connection with their respective animal control programs and their respective activities at the Animal Shelter. The CITY shall indemnify and hold harmless the SHERIFF from all suits, actions, claims, demands and liabilities of whatsoever kind arising out of the wrongful acts or omissions of the CITY, its agents, servants,

INTERLOCAL AGREEMENT FOR USE OF ANIMAL SHELTER BETWEEN THE HARDEE COUNTY SHERIFF AND THE CITY OF WAUCHULA, FLORIDA

and employees. The SHERIFF shall indemnify and hold harmless the CITY from all suits, actions, claims, demands and liabilities of whatsoever kind arising out of the wrongful acts or omissions of the SHERIFF, its agents, servants, and employees. However, nothing contained herein shall constitute a waiver by either party of their sovereign immunity or the limitations set forth in Section 768.28, Florida Statutes. The indemnity and hold harmless obligations of Parties shall survive the termination of this Agreement.

Section 14. Applicable Law and E-Verify. This Interlocal Agreement shall be governed by the laws of the State of Florida. The venue for any litigation resulting from this Agreement shall be in Hardee County, Florida. Should litigation be necessary to enforce any term or provision of this Agreement, then all litigation and collection expenses, witness fees, court costs and attorney's fees shall be paid to the prevailing party. Parties affirmatively state that they are registered with and use the E-Verify system, as defined in Section 448.095, Florida Statutes, to verify the work authorization status of all newly hired employees.

Section 15. Severability. In the event that any provision of this Interlocal Agreement shall, for any reason, be determined invalid, illegal or unenforceable in any respect, the parties hereto shall negotiate in good faith and agree to such amendments, modifications or supplements of this Interlocal Agreement or such other appropriate actions as shall, to the maximum extent practicable in the light of such determination implement and give effect to the intentions of the parties as reflected herein. The other provisions of this Interlocal Agreement, as modified, supplemented or otherwise affected by such action, shall remain in full force and effect.

Section 16. Waiver. Unless otherwise specifically provided for by the terms of this Interlocal Agreement, no delay or failure to exercise a right resulting from any breach of this Interlocal Agreement shall impair such right or shall be construed to be a waiver thereof, but such right may be exercised from time to time and as often as may be deemed expedient. Any waiver shall be in writing and signed by the party granting such waiver. If any representation, warranty or covenant contained in this Agreement is breached by any party and thereafter waived by another party, such waiver shall be limited to the particular breach so waived and shall not be deemed to waive, either expressly or impliedly any other breach, under this Interlocal Agreement.

Section 17. Binding Effect. This Agreement shall be binding upon and inure to the benefit of the parties hereto, their heir, legal representatives, successors, and assigns, but neither this Agreement nor any of the rights hereunder shall be assignable by consultant.

Section 18. Modifications. No modification of any of the provisions of this Agreement shall be binding unless in writing and signed by both parties to this Agreement.

Section 19. Extent of Interlocal Agreement. This Interlocal Agreement represents the entire and integrated agreement between the SHERIFF and the CITY and supersedes all prior negotiations, representations, or agreements, either written or oral pertaining to the use thereof

**INTERLOCAL AGREEMENT FOR USE OF ANIMAL SHELTER BETWEEN THE
HARDEE COUNTY SHERIFF AND THE CITY OF WAUCHULA, FLORIDA**

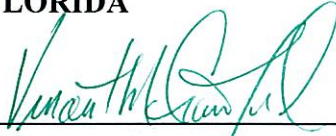
by the CITY. This Interlocal Agreement may only be amended, supplemented, modified, changed or canceled by a duly executed written instrument.

Section 20. Notices. Notices required by or related to this Interlocal Agreement shall be sent by First Class United States mail, postage prepaid. Notices to the Sheriff shall be sent to: Sheriff of Hardee County, 900 E. Summit St, Wauchula, Florida 33873, and notices to the CITY shall be sent to: City Manager, 126 South Seventh Avenue, Wauchula, FL 33873.

Section 21. Effective Date: This Interlocal Agreement shall be effective upon October 1, 2025, so long as the parties have filed or caused to be filed a fully executed copy of this Interlocal Agreement with the Clerk of the Circuit Court of Hardee County, Florida, pursuant to Section 163.01, Florida Statutes.

IN WITNESS WHEREOF, this Interlocal Agreement has been caused to be signed by the respective governing bodies of the parties hereto.

**SHERIFF OF HARDEE COUNTY,
FLORIDA**



VINCENT CRAWFORD, as the SHERIFF

VICTORIA L. ROGERS, Clerk
(SEAL)

ATTEST:

**CITY OF WAUCHULA, FLORIDA, a
Florida municipal corporation**

STEPHANIE CAMACHO, City Clerk

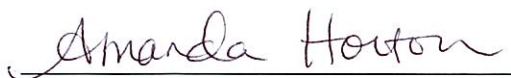
(SEAL)

By: _____
KEITH NADASKAY, JR., Mayor

APPROVED AS TO FORM:

APPROVED AS TO FORM:

KRISTIE HATCHER-BOLIN
City Attorney



AMANDA HORTON
HCSO General Counsel

126 S 7th AVENUE
WAUCHULA FL 33873



PHONE (863) 773-3535
FAX (863) 773-0773

August 29, 2025

City of Wauchula
City Commission
126 S. 7th Avenue
Wauchula, FL 33873

Dear City Commissioner:

The Commission recently approved RFP 25-01 for the Lease of a City-owned building at 723 Green Street. The RFP was subsequently advertised in the local paper and posted on the City website. The City received one proposal and it was opened on August 27, 2025 at 2:00pm.

A four-person selection/review committee was formed and met on August 29, 2025 to evaluate the proposal and score it according to the evaluation criteria in the RFP.

After evaluating and scoring the proposal, it is the recommendation of City staff that RFP 25-01 for the Lease of City-owned building at 723 Green Street be awarded to Achieve and Shine Learning Center and that a lease be executed.

Sincerely,

A handwritten signature in blue ink, appearing to read "Ward Grimes", is written over a horizontal line.

Ward Grimes
Director of Project Management & Procurement

Cumulative Rankings of Selection
Review Committee for RFP 25-01

Achieve & Shine
Learning Center

Ward Grimes

100

Sandee Braxton

85

Stephanie Camacho

100

Melodie Kincaid

90

TOTAL

375



WAUCHULA EVALUATION AND APPRAISAL AFFIDAVIT

I, Keith Nadaskay, Jr., am the Mayor of the City of Wauchula, Hardee County, Florida and do hereby certify, swear, or affirm under the penalty of perjury that I am competent to give the following declaration based on my personal knowledge, and that the following statement is true and correct to the best of my knowledge:

1. This affidavit is provided consistent with the requirements of Florida Statute 163.3191(1).
2. The City of Wauchula's Comprehensive Plan must be updated to address changes to state planning requirements which have occurred since the update of the City's Comprehensive Plan, to extend the Comprehensive Plan to the required minimum planning periods, and to update the population projections as required through Florida Statutes.
3. As Part of the Evaluation and Appraisal Report based amendments, all elements of the San Antonio Comprehensive Plan will comply with Florida Statute 163.3191(1).
4. As Part of the Evaluation and Appraisal Report based amendments, the adopted comprehensive Plan will cover a planning period of 10 years occurring after the plan's adoption and an additional 20-year period, as provided in required by s. 163.3177(5)(a), F.S.
5. The Evaluation and Appraisal Report based amendments will cite the source and date of the population projections used in establishing the 10-year planning period.

Further the affiant sayeth naught.

(Print Name) (Sign Name) (Date)

STATE OF FLORIDA
COUNTY OF HARDEE

The foregoing instrument was acknowledged before me, by means of ☐ physical presence or ☐ online notarization, this ____ day of _____, 20____, by, as, on its behalf, who is personally known to me or who has produced _____ as identification.

Notary Public, State of Florida

Printed Name

My commission expires: _____



**CITY OF WAUCHULA
EVALUATION AND APPRAISAL REPORT (EAR) OF THE CITY'S COMPREHENSIVE PLAN
EAR LETTER AND AFFIDAVIT**

TO: City of Wauchula, City Commission

PREPARED BY: Central Florida Regional Planning Council

AGENDA DATE: September 8, 2025

REQUESTED ACTION: **APPROVE THE EAR AFFIDAVIT AND AUTHORIZE THE MAYOR TO SIGN**

Evaluation and Appraisal Report (EAR):

Pursuant to Chapter 73C-49, Florida Administrative Code, at least every seven years, local governments shall determine whether the need exists to amend their Comprehensive Plan to reflect changes in state requirements and local trends since the last time the Comprehensive Plan was updated.

In addition, the EAR evaluates how successful the City has been in addressing identified major land use planning issues through the implementation of its Comprehensive Plan. Based on this evaluation, the EAR recommends how the plan should be updated to further address objectives, changing conditions and trends affecting the community and changes in state requirements.

Submittal of EAR Notification Letter:

According to Florida Commerce Evaluation and Appraisal Report Notification Schedule, Wauchula's Evaluation and Appraisal Affidavit is due October 1, 2025. The City will submit an Evaluation and Appraisal notification letter to the State consistent with Florida Statutes 163.3191(1) to bring the City in compliance with this due date. The notification letter package will include:

- Notification that amendments are necessary to reflect a minimum planning period of at least 10 years and to reflect changes in state requirements.
- An affidavit, signed by the Mayor, attesting that all elements of the comprehensive plan will comply, will certify that the adopted comprehensive plan contains the minimum planning period of 10 years, and will cite the source and date of the population projections used in establishing the 10-year planning period.

Attachments:

Evaluation and Appraisal Affidavit
Section 163.3191, Florida Statutes



WAUCHULA EVALUATION AND APPRAISAL AFFIDAVIT

I, Keith Nadaskay, Jr., am the Mayor of the City of Wauchula, Hardee County, Florida and do hereby certify, swear, or affirm under the penalty of perjury that I am competent to give the following declaration based on my personal knowledge, and that the following statement is true and correct to the best of my knowledge:

1. This affidavit is provided consistent with the requirements of Florida Statute 163.3191(1).
2. The City of Wauchula's Comprehensive Plan must be updated to address changes to state planning requirements which have occurred since the update of the City's Comprehensive Plan, to extend the Comprehensive Plan to the required minimum planning periods, and to update the population projections as required through Florida Statutes.
3. As Part of the Evaluation and Appraisal Report based amendments, all elements of the Wauchula Comprehensive Plan will comply with Florida Statute 163.3191(1).
4. As Part of the Evaluation and Appraisal Report based amendments, the adopted comprehensive Plan will cover a planning period of 10 years occurring after the plan's adoption and an additional 20-year period, as provided in required by s. 163.3177(5)(a), F.S.
5. The Evaluation and Appraisal Report based amendments will cite the source and date of the population projections used in establishing the 10-year planning period.

Further the affiant saith naught.

(Print Name) (Sign Name) (Date)

STATE OF FLORIDA
COUNTY OF HARDEE

The foregoing instrument was acknowledged before me, by means of ☐ physical presence or ☐ online notarization, this ____ day of _____, 20____, by, as, on its behalf, who is personally known to me or who has produced _____ as identification.

Notary Public, State of Florida

Printed Name

My commission expires: _____

Select Year: 2024 ▼ Go

The 2024 Florida Statutes

Title XI	Chapter 163	View Entire Chapter
COUNTY ORGANIZATION AND INTERGOVERNMENTAL RELATIONS	INTERGOVERNMENTAL PROGRAMS	

163.3191 Evaluation and appraisal of comprehensive plan.—

(1) At least once every 7 years, each local government shall evaluate its comprehensive plan to determine if plan amendments are necessary to reflect a minimum planning period of at least 10 years as provided in s. [163.3177\(5\)](#) or to reflect changes in state requirements in this part since the last update of the comprehensive plan, and notify the state land planning agency as to its determination. The notification must include a separate affidavit, signed by the chair of the governing body of the county or the mayor of the municipality, attesting that all elements of its comprehensive plan comply with this subsection. The affidavit must also include a certification that the adopted comprehensive plan contains the minimum planning period of 10 years, as provided in s. [163.3177\(5\)](#), and must cite the source and date of the population projections used in establishing the 10-year planning period.

(2) If the local government determines amendments to its comprehensive plan are necessary to reflect changes in state requirements, the local government must prepare and transmit within 1 year such plan amendment or amendments for review pursuant to s. [163.3184](#).

(3) Local governments shall comprehensively evaluate and, as necessary, update comprehensive plans to reflect changes in local conditions. Plan amendments transmitted pursuant to this section must be reviewed pursuant to s. [163.3184\(4\)](#). Updates to the required elements and optional elements of the comprehensive plan must be processed in the same plan amendment cycle.

(4) If a local government fails to submit the letter and affidavit prescribed by subsection (1) or to transmit the update to its plan pursuant to subsection (3) within 1 year after the date the letter was transmitted to the state land planning agency, it may not initiate or adopt any publicly initiated plan amendments to its comprehensive plan until such time as it complies with this section, unless otherwise required by general law. This prohibition on plan amendments does not apply to privately initiated plan amendments. The failure of the local government to timely update its plan may not be the basis for the denial of privately initiated comprehensive plan amendments.

(5) If it is determined that a local government has failed to update its comprehensive plan pursuant to this section, the state land planning agency must provide the required population projections that must be used by the local government to update the comprehensive plan. The local government shall initiate an update to its comprehensive plan within 3 months following the receipt of the population projections and must transmit the update within 12 months. If the state land planning agency finds the update is not in compliance, it must establish the timeline to address the deficiencies, not to exceed an additional 12-month period. If the update is challenged by a third party, the local government may seek approval from the state land planning agency to process publicly initiated plan amendments that are necessary to accommodate population growth during the pendency of the litigation. During the update process, the local government may provide alternative population projections based on professionally accepted methodologies, but only if those population projections exceed the population projections provided by the state land planning agency and only if the update is completed within the timeframe set forth in this subsection.

(6) The state land planning agency may not adopt rules to implement this section, other than procedural rules or a schedule indicating when local governments must comply with the requirements of this section.

History.—s. 11, ch. 75-257; s. 10, ch. 85-55; s. 11, ch. 86-191; s. 10, ch. 92-129; s. 13, ch. 93-206; s. 6, ch. 95-322; s. 29, ch. 96-416; s. 4, ch. 98-146; ss. 6, 14, ch. 98-176; s. 5, ch. 98-258; s. 17, ch. 2000-158; s. 9, ch. 2002-296; s. 905, ch. 2002-387; s. 1, ch. 2004-230; s. 8, ch. 2005-290; s. 12, ch. 2005-291; s. 13, ch. 2007-196; s. 5, ch. 2007-198; s. 4, ch. 2007-204; s. 5, ch. 2010-205; s. 20, ch. 2011-139; s. 8, ch. 2012-96; s. 9, ch. 2012-99; s. 2, ch. 2023-31.

Hardee County School Board Agenda Analysis

Author:

Sherri Albritton, EdD

Date: 08/14/2025

Subject:

Agreement with City of Wauchula for a school resource officer at Wauchula Elementary from 10/01/2025 through 9/30/2026.

Background Information:

For several years, the City of Wauchula has provided a police officer at Wauchula Elementary. The attached agreement with the City of Wauchula and Hardee School Board continues the school resource officer program at Wauchula Elementary. Other than the cost, this agreement is very similar to the one approved by the School Board last year.

The City Commission is expected to sign the agreement at their next meeting on September 8, 2025.

We appreciate the opportunity to partner with the City of Wauchula and the Wauchula Police Dept. to enhance the safety of students and staff at Wauchula Elementary.

Administrative Consideration:Section 1001.51 Duties and Responsibilities of District School Superintendent

(II)(j) Contracts-Recommend to the District School Board the desirable terms, conditions and specifications for contracts for services and see that services are provided according to contract.

(13)(a) Cooperation with Other Agencies-Cooperate with State, County and municipal agencies in the enforcement of laws and rules pertaining to all matters relating to education and child welfare.

Fiscal Impact:

 We will pay \$48361 from our Safe Schools categorical funds, an increase of \$1356 from 2024-2025. Our payment represents 60% of the police officer's pay and benefits.

Proposed Recommendation to School Board:

Recommend approval of agreement with City of Wauchula for a school resource officer at Wauchula Elementary from October 1, 2025 to September 30, 2026.

Action Required:  Consent Agenda X

BOARD ACTION

8/14/2025
Approved

28 of 28

**WAUCHULA ELEMENTARY SCHOOL AGREEMENT BETWEEN
THE SCHOOL BOARD OF HARDEE COUNTY, FLORIDA
AND
THE CITY OF WAUCHULA, FLORIDA, AND THE WAUCHULA POLICE DEPARTMENT
FOR
THE SCHOOLR ESOURCE OFFICER PROGRAM**

THIS AGREEMENT is made and entered into this 14th day of August, 2025, by and between the SCHOOL BOARD OF HARDEE COUNTY, FLORIDA, a political subdivision of the State of Florida (hereafter the "SCHOOL BOARD"), AND CITY OF WAUCHULA, FLORIDA (hereafter "CITY").

RECITALS

1. The SCHOOL BOARD and the CITY desire to provide law enforcement and related services to Wauchula Elementary School of Wauchula, FL, beyond those normally provided, and to provide a positive image of law enforcement through interaction with students by law enforcement officers; and
2. A School Resource Officer Program has been implemented for Wauchula Elementary school within the City of Wauchula as hereinafter described; and
3. The SCHOOL BOARD and the CITY recognize the potential outstanding benefits of the School Resource Officer Program to the residents of the City of Wauchula, Florida, and particularly to the students at Wauchula Elementary School; and
4. It is in the best interests of the SCHOOL BOARD, the CITY, and the residents of the City of Wauchula to establish this program.

Section 1. School Resource Officer Program. This Agreement governs the School Resource Officer Program in the public-school system with the Wauchula Police Department for the period 10/01/2025 throughout 9/30/2026.

Section 2. Rights and Duties of the CITY. The CITY shall provide a School Resource Officer, hereinafter referred to as SRO, as follows:

A. Assignment of School Resource Officer.

The CITY shall assign regularly employed officers to the Wauchula Elementary School for the period of 10/01/2025 through 09/30/2026. If an SRO is unavailable, the CITY will use their best efforts to provide a replacement SRO. During the pendency of a replacement, the CITY will utilize certified law enforcement personnel to the SRO program to provide temporary coverage until a replacement SRO has been assigned. All personnel assignments will be in the sole discretion of the CITY.

B. Regular Duty Hours of School Resource Officer.

The SRO shall be assigned to his/her school on a full-time or part-time basis on those days and during those hours that the school is in regular session. The SRO may be temporarily re-assigned by the CITY during school holidays and vacations, for training, or during the period of a law enforcement emergency.

C. Equipment of School Resource Officer.

All equipment purchased by the CITY for the SRO to perform his/her duties will remain the property of the CITY and the Wauchula Police Department.

D. Duties of the School Resource Officer.

1. The SRO shall act as an instructor for specialized short-term programs at the school, when invited to do so by the principal or a member of the faculty, when this function is appropriate and does not interfere with other related law enforcement functions.
2. The SRO shall seek coordination, advice and guidance prior to enacting any programs within the school.
3. The SRO shall develop expertise in presenting various subjects to students. Such subjects shall include a basic understanding of the laws, the role of the law enforcement officer, and the law enforcement mission.
4. The SRO shall encourage individual and small group discussions with students, to further establish rapport with the students.
5. When requested by the principal, the SRO shall attend parent faculty meetings to solicit support and understanding of the program, subject to the availability of the SRO in the sole discretion of the CITY.
6. The SRO shall make himself/herself available for conference with students, parents and faculty members in order to assist them with problems of a law enforcement or crime prevention nature. Confidential information obtained pursuant to Chapter 39, Florida Statutes (proceedings relating to juveniles), shall not be disclosed except as provided by law or court order.
7. The SRO shall become familiar with all community agencies that offer assistance to youths and their families, such as mental health clinics, drug treatment centers, etc. The SRO shall recommend referrals to such agencies, when necessary, thereby acting as a resource person to the students, faculty and staff of the school.

8. The SRO shall assist the principal in developing plans and strategies to prevent and/or minimize dangerous situations that may result from student unrest.
9. Should it become necessary to conduct formal police interviews with students, the SRO shall adhere to SCHOOL BOARD policy, CITY'S policy, and legal requirements with regard to such interviews.
10. The SRO shall take law enforcement action as required. As soon as practical, the SRO shall make the principal of the school, or other school administrator if the principal is unavailable, aware of such action. The SRO shall take appropriate law enforcement action against intruders and unwanted guests who may appear at the school and related school functions, to the extent that the SRO may do so under the authority of law.
11. The SRO shall give assistance to other law enforcement officers and government agencies in matters regarding their school assignment, or other law enforcement matters.
12. The SRO shall not act as a school disciplinarian, as disciplining students is a school responsibility. However, if the principal believes an incident is a violation of the law, the principal may contact the SRO, and the SRO shall determine whether law enforcement action is appropriate.

Section 3. Rights and Duties of the School Board. The SCHOOL BOARD shall provide to all full-time SROs the following materials and facilities, which are deemed necessary to the performance of the SRO's duties:

1. Access to an air-conditioned and properly lit office, equipped with a telephone that may be used for general business purposes.
2. A location for files and records that can be properly locked and secured.
3. A desk with drawers, a chair, worktable, filing cabinet and office supplies.
4. Access to a typewriter and/or secretarial assistance.
5. Access to a computer to complete reports and assigned work.

Section 4. Financing the School Resource Officer Program. The SCHOOL BOARD shall reimburse the CITY for a portion of the cost incurred by the CITY to provide the School Resource Officer to the Wauchula Elementary School. The cost for the provision of the SRO to the SCHOOL BOARD is hereby established to be \$48,361.00 for the fiscal year 10/01/2025 through 09/30/2026. Therefore, the total commitment that is needed from the SCHOOL BOARD for the period 10/01/2025 through 09/30/2026 for this program is \$48,361.00 for one SRO position.

Section 5. Employment Status of the School Resource Officer. The SRO shall remain an employee of the CITY and shall not be an employee of the SCHOOL BOARD. The SCHOOL BOARD and the CITY acknowledge that the SRO is a law enforcement officer who shall uphold the law under the direct supervision and control of the CITY. The SRO shall remain responsive to the chain of command of the CITY. Nothing herein shall be construed as giving the SCHOOL BOARD Superintendent, Principal, or other agent of the SCHOOL BOARD the right to control the professional judgment or actions of the SRO. The CITY has agreed to make personnel who are qualified available to the SCHOOL BOARD, and the CITY covenants and agrees that the CITY will instruct all SROs to (i) use diligent efforts and appropriate skills and judgment and (ii) provide services in accordance with and in a manner consistent with customary and recognized standards of the law enforcement profession. The CITY understands that the SRO will not participate in any employee benefit provided by the SCHOOL BOARD and represents to the SCHOOL BOARD that the City of Wauchula will pay all compensation for their employees, will withhold income tax and social security tax for their employees, and will maintain workers compensation insurance for their employees.

Section 6. Dismissal of School Resource Officer; Replacement.

- A. If the principal of the Wauchula Elementary School feels that the particular SRO is not effectively performing his/her duties and responsibilities, the principal shall recommend to the Superintendent of Schools that the SRO be removed from the program at his/her school and shall state the reasons therefore in writing. Within a reasonable time after receiving the recommendation from the principal, the Superintendent or his/her designee shall advise the CITY of the principal's request. If the CITY so desires, a designee shall meet with the SRO to discuss or resolve any problems which may exist. At such meetings specified members of the staff of the school to which the SRO is assigned may be requested to be present. If, within a reasonable amount of time after commencement of such discussion, the problem cannot be resolved, after due consideration of input from the Superintendent of Schools, the status of the SRO shall be determined by the CITY.
- B. The CITY may dismiss or reassign any SRO based upon department rules, regulations and/or operations orders or CITY'S discretion.
- C. In the event of the resignation, dismissal, illness, reassignment or other good and sufficient reason for unavailability of the SRO, or in the case of long-term absences by an SRO, the CITY shall utilize best efforts to provide a temporary replacement for the SRO within thirty (30) days of such officer's unavailability and to otherwise cover the position as best feasible utilizing existing personnel. As soon as practical, a permanent replacement will be recommended.

Section 7. Exchange of Information. This interlocal, interagency agreement shall be considered for all purposes pursuant to Section 1002.22(3)(d)13 as an exception to Students' Right to Privacy to allow the release and exchange of personally identifiable records or reports of a pupil or student to the CITY without the consent of the pupil or the pupil's parents.

Section 8. Termination of Agreement. Should either party breach any of the covenants, terms or conditions of this Agreement the other party may give written notice to remedy said breach within thirty (30) days. In the event the breaching party fails to remedy the breach within thirty (30) days of written notice, the non-breaching party may (a) continue this Agreement in effect and enforce all its rights and remedies hereunder, or (b) terminate this Agreement.

Section 9. Good Faith. The SCHOOL BOARD and the CITY, and their respective agents and employees agree to cooperate in good faith in fulfilling their terms of this Agreement. Unforeseen difficulties or questions will be resolved by negotiation between the SCHOOL BOARD and the CITY, or their designees.

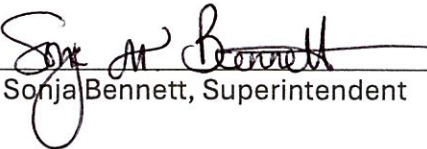
Section 10. Modifications. This document constitutes the full understanding of the parties, and no terms, conditions, understandings or agreement purporting to modify or vary the terms of this document shall be binding unless hereafter made in writing and signed by the party to be charged.

Section 11. Duplicate Originals. This agreement may be executed in duplicate copies, each copy of which shall be deemed original.

[The remainder of this page is left intentionally blank.]

IN WITNESS WHEREOF, the parties have caused this Agreement to be signed by their duly authorized officers.

THE SCHOOL BOARD OF
HARDEE COUNTY, FLORIDA

Sign: 
Sonja Bennett, Superintendent

Sign: 
Hardee County School Board, Chair

"CITY"

City of Wauchula, a municipal corporation

By: _____
Richard Keith Nadaskay, Jr., Mayor

ATTEST:

Stephanie Camacho, City Clerk

APPROVED AS TO FORM &
CORRECTNESS

Kristie Hatcher-Bolin, City Attorney

**HARDEE COUNTY
ECONOMIC DEVELOPMENT AUTHORITY**

GRANT AWARD AGREEMENT

THIS AGREEMENT made and entered into this 26th day of August 2025, by and between the Hardee County Economic Development Authority, hereinafter referred to as "EDA," and the City of Wauchula, hereinafter referred to as the "CITY," located at 126 South 7th Ave., Wauchula, Florida 33873.

The EDA, pursuant to Chapter 2004-394, Laws of Florida, as amended by Chapter 2020-200, Laws of Florida, is authorized to establish the Infrastructure Grant Program to provide grants to qualified for-profit and not-for-profit entities to fund projects that provide economic development opportunities, job creation and infrastructure within the geographic boundaries of Hardee County.

The EDA has determined that the proposed City infrastructure project, Heard Bridge Road Watermain Loop Project, has met all the requirements necessary for participation in the EDA Grant Program in accordance with the submitted grant application incorporated herein and attached as Exhibit "A" and the EDA Infrastructure Grant Program Guidelines attached hereto and incorporated herein as Exhibit "B;" and

The EDA desires to distribute funds to the City for the Heard Bridge Road Watermain Loop Project that provide economic development, job creation opportunities and infrastructure within the geographic boundaries of Hardee County the sum of \$1,000,000 as provided for in Exhibit "A;" and

The Heard Bridge Road Watermain Loop Project, EDA Infrastructure Project Grant Application (Exhibit "A"), and EDA Infrastructure Grant Program Guidelines (Exhibit "B"), is

hereby incorporated into this agreement and the representations made at the duly noticed meeting of the EDA is hereby incorporated into this Agreement as if full set forth herein.

In consideration for the mutual undertakings and agreements hereinafter set forth, EDA and the City agree as follows:

1.0 PARTIES: The parties and their respective addresses for purposes of this Agreement are as follows:

HARDEE COUNTY
ECONOMIC DEVELOPMENT AUTHORITY
C/O COUNTY MANAGER'S OFFICE
412 W. ORANGE ST., ROOM 103
WAUCHULA, FL 33873
P: 863-773-9430; E: BCC@HARDEECOUNTY.NET

CITY OF WAUCHULA
126 SOUTH 7TH AVE.
WAUCHULA, FL 33873
P: 863-773-3131
E: OMINSHEW@CITYOFWAUCHULA.COM

2.0 ADMINISTRATOR: The EDA Agreement administrator is Terry Atchley, County Manager. The City Agreement administrator is Olivia Minshew, City Manager. All approvals referenced in this agreement must be obtained from the agreement administrators or their designees. Any notice, demand, request, or other communication shall be effective only if in writing and when it is received by the Agreement Administrator at the address provided for herein.

In the event that a different Agreement Administrator is designated by either Party after execution of this contract, notice of the name, address and telephone number of the new Agreement Administrator shall be delivered in writing to the other Party and said notification shall be attached to this Agreement.

3.0 TERM OF AGREEMENT: The term of this Agreement shall commence on October 1, 2025, and continue until completion of the project and payment of all outstanding amounts as provided for in the attached.

4.0 CITY DESCRIPTION:

(a) The City is an operating unit of City of Wauchula, FEIN 59-6000446.

5.0 PROJECT DESCRIPTION: Heard Bridge Road Watermain Loop Project

6.0 NOTICES: All notices pertaining to this Agreement are in effect upon receipt by EDA, shall be in writing, and shall be transmitted either by personal hand delivery, United States Post Office, return receipt requested; or overnight express mail delivery. The addresses set forth above for the respective parties shall be the places where notices shall be sent unless prior written notice of change of address is given.

7.0 OBLIGATIONS OF THE CITY: The City agrees to:

- (a) administer funds in accordance with the Approved Plan and project description, a copy of which is attached hereto and incorporated herein as Exhibit "A";
- (b) provide a budget and detailed reports to the EDA regarding the project. Reports must be completed to the satisfaction of the EDA;
- (c) upon request by the EDA, and within a reasonable time, allow the EDA to inspect supporting documentation of reported outcomes and expenses inclusive of receipts, canceled checks, basis for disbursements and invoices;
- (d) retain records for at least five (5) years following the end of this Agreement or deliver such records to the EDA for retention. If any litigation, claim, negotiation, audit, or other action involving the records has been started before the expiration of the five (5) year period, the records shall be retained until completion of the action and resolution of all issues which arise from it, or until the end of the five (5) year period, whichever is later;
- (e) upon request by the EDA, and within a reasonable time, allow the EDA to inspect, review and audit all records received or created pursuant to this Agreement;
- (f) submit quarterly project status reports and quarterly reimbursement requests as attached hereto and incorporated herein as Exhibit "C".

8.0 OBLIGATIONS OF THE EDA: The EDA agrees to:

- (a) provide a format for all required reports and assist the City in completing reports satisfactory to the EDA;
- (b) provide or assist in obtaining technical assistance as needed to distribute the Designated Funds in accordance with the Approved Plan;
- (c) following any site visit or review, provide a written report with comments and recommendations regarding the manner in which services are being provided;
- (d) provide oversight for the efficient and effective distribution of the Designated Funds.

9.0 TERMINATION OF THIS AGREEMENT:

(a) The Agreement may be terminated by EDA upon failure of the City to comply with any material term or condition of this Agreement or a decision by the City either not to proceed with the project defined in Section 5.0 or to proceed with that project in an alternate location without prior approval of the EDA.

(b) The Agreement may be terminated by the City with thirty (30) days prior notice, all funds shall be refunded to the EDA within forty-five (45) days of the date of notice of termination to the EDA. The EDA shall have the option, in its sole discretion, to waive the requirement to refund the grants funds so long as the purchased equipment or facilities shall continue to be used for purposes provided for herein.

10.0 PENALTY: Fraudulent procurement or receipt of funds under this program renders the City liable for repayment.

11.0 LEGAL REQUIREMENTS:

(a) This agreement is executed and entered in Hardee County and will be construed, performed, and enforced in all respects in accordance with the laws and rules of the State of Florida. Each party will perform its obligations in accordance with the terms and conditions of this agreement. Any and all litigation arising under this Agreement shall be brought in the appropriate court in Hardee County, Florida.

12.0 NON-DISCRIMINATION: The City will not discriminate against any employee employed in the performance of this agreement, or against any applicant for employment because of age, ethnicity, religious belief, disability, national origin, or sex. The City shall insert a similar provision in all subcontracts for services by this Agreement.

13.0. RESTRICTION AGAINST ASSIGNMENT: No part of this Agreement shall be assigned, subcontracted, or delegated by either Party to a third party without the prior written consent of the other Party.

14.0 ENFORCEABILITY: If any term or provision of this Agreement is found to be illegal and unenforceable, the remainder of the Agreement will remain in full force and effect and such term of provision will be deemed stricken.

15.0 WAIVER: The failure of either party to this Agreement to object to or to take affirmative action with respect to any conduct of the other which is in violation of the terms of this Agreement shall not be construed as a waiver of the violation or breach, or of any future violation, breach, or wrongful conduct.

16.0 COUNTERPARTS: This Agreement may be executed in counterparts, each of which shall be considered an original for all purposes.

17.0 MODIFICATION: This writing contains the entire Agreement of the parties. No representations were made or relied upon by either party, other than those that are expressly set forth. No agent, employee, or other representative of either party is

empowered to alter any of the terms of this Agreement, unless done in writing and signed by an authorized officer of the City and the authorized agent of EDA.

18.0 INDEMNIFICATION: The City shall indemnify and hold harmless the EDA, its officers, agents, and employees, from and against any and all demands, claims, losses, suits, liabilities, causes of action, judgment or damages, arising from City's acts, errors, or omissions arising out of the performance or non-performance of any provision of this Agreement, including, but not limited to, liabilities arising from contracts between the City and third parties made pursuant to this Agreement. City shall reimburse the EDA for all its expenses including reasonable attorneys' fees and costs incurred in and about the defense of any such claim or investigation and for any judgment or damages arising from City performance or non-performance of this Agreement. The provisions of this Section shall survive termination of this Agreement.

19.0 COMPLIANCE WITH LAWS

- (a) The City shall comply with all applicable laws, ordinances, rules, regulations, and lawful orders or public authorities in carrying out this Agreement, and in particular shall obtain all required permits from all jurisdictional agencies.
- (b) The City shall be held responsible for any violation of laws, rules, regulations, or ordinances affecting in any way the work and the conduct of all persons engaged in or the materials or methods used on the work. The City shall give all notices and comply with all laws, ordinances, rules, regulations, and orders of any public authority bearing on the performance of the work under this Agreement. At all times during this Agreement, the City shall secure and maintain all permits, fees, licenses, and inspections necessary for the execution of the work.

20.0 ENTIRE AGREEMENT: This instrument embodies the entire agreement of the parties. There are no provisions, terms, condition, or obligations other than those contained in this agreement; and this agreement superseded all previous communication, representation, or agreement, either verbal or written, between the parties. No amendment will be effective unless reduced to writing and signed by the parties.

21.0 DUPLICATE ORIGINALS: This Agreement is executed in duplicate originals.

HARDEE COUNTY
ECONOMIC DEVELOPMENT AUTHORITY

CITY OF WAUCHULA

AUTHORIZED SIGNATURE

Date

AUTHORIZED SIGNATURE

Date

TITLE: _____

TITLE: _____

WITNESSES:

WITNESSES:

EXHIBIT A

EDA Infrastructure Project Grant Application

EXHIBIT B

GUIDELINES OF THE
HARDEE COUNTY
ECONOMIC DEVELOPMENT AUTHORITY
(INDEPENDENT BOARD)

INFRASTRUCTURE GRANT PROGRAM (IGP)

- I. PURPOSE
- II. DEFINITIONS
- III. GENERAL REQUIREMENTS
- IV. APPLICATION REQUIREMENTS & PROCESSING
- V. EVALUATION CRITERIA
- VI. GRANT ADMINISTRATION
- VII. COMPLIANCE RESPONSIBILITIES

I. PURPOSE. The Hardee County Economic Development Authority Independent Board (Authority), pursuant to Section 211.3103(3)(b)3 F.S., is authorized to establish the Infrastructure Grant Program to provide grants to qualified for-profit and not-for-profit entities to fund projects that provide economic development opportunities, private sector job creation or infrastructure within the geographic boundaries of Hardee County. The purpose of this part is to set forth procedures to govern the program.

II. DEFINITIONS. The terms used in this part are defined as follows:

1. "APPLICANT" means a local government entity (Board of County Commissioners, municipalities, authorities [i.e., water, airport, etc.]), non-profit business or for-profit businesses.
2. "APPLICATION" means a formal request for EDA funds by an applicant consisting of a complete project application form with all required documentation.
3. "APPLICATION SUBMISSION PERIOD" means the formally announced period of time provided by the EDA for the submission of applications by local entities, non-profit businesses, and for-profit businesses.
4. "AUTHORITY" means the Hardee County Economic Development Authority.

5. "BUSINESS ENTITY" means an economic unit that controls resources, incurs obligations, and engages in business activities in one or more locations.
6. "CASH" means money paid by a grantee to purchase goods and services from private and independent sources for accomplishment of an EDA project. In-kind service costs are not cash.
7. "CAPITAL IMPROVEMENT PLAN" means that portion of an applicant's adopted local comprehensive plan which indicates a schedule of capital improvement projects, including estimated costs and target dates for completion.
8. "CLERK" means the clerk of the court serving in the capacity of chief financial officer of the county.
9. "COMMISSION" means the Board of County Commissioners of Hardee County.
10. "COUNTY" means Hardee County.
11. "DEVELOPMENT" means the act of physically improving an area, facility, resource, or site to increase its ability or capacity to serve economic development, private sector job creation or infrastructure purposes.
12. "EVALUATION CRITERIA" means the standards used to evaluate EDA applications.
13. "ESTIMATED PROGRAM FUNDS" means the amount of EDA funds estimated to be available for the subsequent fiscal year by the Authority.
14. "FACILITY" means a component of a capital improvement project.
15. "FISCAL YEAR" means the County fiscal year, October 1 – September 30.
16. "FUNDING CYCLE" means the interval of time between the start of an EDA application submission period and appropriation of project funds by the Authority.
17. "GRANT" means program funds authorized by the Authority for release to a grantee for implementation of an approved project.
18. "GRANT AWARD AGREEMENT" means an executed contract between the Authority and a grantee setting forth mutual obligations and reimbursement schedules regarding an approved EDA project.
19. "GRANTEE" means a local governmental entity, non-profit business or for profit-business receiving EDA funds pursuant to an approved EDA application.

20. "IN-KIND SERVICE COSTS" means in-house expenses incurred by a grantee for labor and materials and grantee-owned and maintained equipment for accomplishment of an approved EDA project. Volunteer labor, inmate labor, or donated materials are ineligible program expenses.
21. "INFRASTRUCTURE" means storm water systems; telecommunications facilities; roads or other remedies to transportation impediments; nature-based tourism facilities; additions to the distribution facilities of existing natural gas utilities, existing electric utilities, or existing water or wastewater utilities, or other physical requirements necessary to facilitate tourism, trade and economic development activities in the community dedicated for public use.
22. "LAND VALUE" means the assessed fair market value of land used by a grantee as match to EDA funds.
23. "LOCAL GOVERNMENT COMPREHENSIVE PLAN" means a plan adopted pursuant to Chapter 163, Florida Statutes.
24. "LOCAL GOVERNMENTAL ENTITY" means a county government, municipality (incorporated city, town or village), or an independent special district of the State of Florida with legal responsibility.
25. "MATCH" means the provision of cash, in-kind service costs or land value in the ratio required by these guidelines to be added to EDA funds by the grantee for the project cost.
26. "NEEDS" means a deficiency in or a necessity to carry out a predetermined level of service.
27. "NEW CONSTRUCTION" means building of new facilities not previously in existence.
28. "PRIORITY LIST" means a list that contains all eligible applications which will meet or exceed the minimum ranking as identified in the "Criteria for the Purpose of Ranking Projects" summary included in the application packet.
29. "PROGRAM" means the EDA grant-in-aid program.
30. "PROGRAM AMOUNT" means the amount of EDA funds received for severance tax.
31. "PROJECT" means the planned undertaking in which all actions or activities have a clear-cut identity and a well-defined objective that has been planned to the point of definite implementation for which EDA funds will be used.

32. "PROJECT COMPLETION" means the project is available for use of operational use for infrastructure projects. Project must be designated complete prior to release of final reimbursement.
33. "PROJECT COMPLETION DATE" means the date specified in a Grant Award Agreement by which a grantee shall complete an approved EDA project and incur all grant and if applicable, match related expenses. Private sector job creation projects, employee retention requirements shall be met.
34. "PROJECT COST" means the total of an EDA grant award and required match.
35. "PROJECT ELEMENT" means an identified facility within a project.
36. "PROJECT PERIOD" means the period of time set forth in a Grant Award Agreement during which eligible project costs may be incurred and charged to the grant.
37. "PROJECT SITE" means the specific area, and boundaries thereof, as shown by a survey and a legal description, for which EDA funds are used.
38. "REAL PROPERTY" means land and improvements attached or affixed to the land.
39. "RENOVATION" means repair, replacement, or restoration of like facilities to an improved state of condition of which allows job retention and or private sector job creation.
40. "SITE CRITERIA" means criteria related to the site shall be established by the Authority prior to any solicitation for grant applications.
41. "STAFF" means BCC staff as designated by the County Manager.
42. "SUPPORT FACILITY" means a facility which could not stand alone, or which would have little or no public value without the primary facility. Examples of support facilities are parking lots, restrooms, bathhouses, combined restroom-concession stand buildings, access roads, walkways, landscaping as required by Hardee County LDR, security lighting and fencing, and interpretive signs.
43. "PRIVATE SECTOR JOBS" means any job in which goods and services are produced by individuals and companies and is not controlled by the state or local government.
44. "PUBLIC SECTOR JOBS" means any job controlled by the state or local government. Includes nationalized industries, national, state, and local government services, and public corporations.

III. **GENERAL REQUIREMENTS.** The following constitutes the general procedures for the program:

(1) **EDA APPLICATION CATEGORIES.** Infrastructure applicants must demonstrate a direct relationship between the infrastructure funding request and tourism, trade, and economic development “activity”. Infrastructure applications seeking funding to rehabilitate existing public infrastructure without direct connectivity to job creation are not favored. The EDA recognizes four types of infrastructure application categories:

1. Public Infrastructure necessary for the immediate or facilitation of the creation of jobs, with or without the use of “performance-based mortgage instrument”.
2. Private infrastructure necessary for the immediate, direct creation of jobs, with or without use of “performance-based mortgage instrument”, as each application may require to adequately protect the public investment.
3. Joint infrastructure between a governmental entity and a private sector employment or infrastructure entity.
4. Those so defined by a two-thirds majority of the Authority members (declaration). This 2/3 majority vote shall require that action be taken at a meeting at which a majority of the members is present.

Note: a **performance-based mortgage** shall be created between the entities above, where appropriate, without EDA oversight. The sponsoring government entity shall be the grantee. The grantee is responsible for the creation, implementation, and disposition of such instruments.

(2) **DISTRIBUTION OF PROGRAM FUNDS.** EDA funds are distributed as reimbursement grants by the Authority on a project-by-project basis to applicants eligible under these guidelines. The Authority's performance and obligation to award program grants are contingent upon an annual appropriation as announced in the Florida Administrative Weekly for the subsequent fiscal year.

(3) **APPLICATION SUBMISSION PERIOD.** The Authority shall accept program applications only during the application submission period. Applications must be postmarked on or before the last day of the application submission period. The Authority shall publicize the dates of the application submission period and other pertinent application information specified in these guidelines in the Florida Administrative Weekly.

(4) **GRANT AWARD.** The Authority shall rank applications to the extent of estimated available program funds based on criteria relating to administrative capacity, public benefit, economic benefits, and public use.

(5) **PROGRAM AMOUNT ALLOCATION.** For each funding cycle, the Authority shall divide the estimated available program amount into four categories: Joint Application, Job Creation Application, Economic Development Application, and EDA Infrastructure.

(6) **RECOMMENDED APPLICATION PRIORITY LIST.** The program amount assigned to each fund as established by the Authority shall be divided into four categories: Joint

Application, Job Creation Application, Economic Development Application, and EDA Infrastructure. Applications shall be ranked according to the criteria summary sheet. The application satisfying the most criteria will receive the highest priority. The remaining applications will be arranged in descending order according to their assigned criteria. Applications criteria below the minimum, established by the Authority shall not be placed on the priority list. The priority list shall include recommendations for distribution of available program funds. In the event there are insufficient applications to account for all program funds assigned to a category or fund, the remaining funds shall then be allocated to the other categories or funds.

(7) **BREACH OF CONTRACT.** The Authority shall deny or suspend program eligibility to any applicant or grantee against which the Authority has an unsettled financial claim and/or dispute of attainment of program requirements.

IV. APPLICATION REQUIREMENTS and PROCESSING. The Authority shall approve applications for program grants in order of ranking until all program funds are depleted under the following standards and criteria:

(1) **ELIGIBLE APPLICANTS.** A local government entity (Board of County Commissioners, municipalities, authorities [i.e., water, airport, etc.]), non-profit business or for-profit businesses may submit EDA applications during the application submission period.

(2) **PROJECT ELIGIBILITY.**

(a) **Joint Application, Job Creation Application, Economic Development Application, and EDA Infrastructure:** EDA grants shall only be awarded to grantees for projects that are for the sole purpose of providing infrastructure or private sector job creation.

(b) **Eligible Site:** The site of an EDA development project shall be owned by the applicant or shall be under lease to the applicant for a period of time sufficient to satisfy the dedication period by the submission period deadline. The Authority shall make exceptions when the applicant demonstrates that: 1) it is in the public interest, and it complies with all other parts of these guidelines. Other forms of real property interest will be considered if the applicant provides clear and explicit documentation showing that it has the sole ability to control, manage, and dedicate the property for the required period of time. Site control verification must be received by the execution of the Grant Award Agreement.

(c) **Number of Applications:** An applicant may submit more than one application for grant assistance. An application grant project must be limited to a single site or group of sites in which all the properties have the same owner or owners.

(d) **Active Projects:** A grantee with an open EDA project by the closing date of an application submission period can be eligible to submit additional applications.

(e) Duplicate Projects: An applicant shall not submit the same application, in whole or in part in concurrent or overlapping funding cycles.

(3) COMPLETENESS/ELIGIBILITY DETERMINATION. Following closure of an application submission period, Authority staff will review and determine the completeness of each application based on the following:

(a) Applications received by the application submission deadline will be reviewed and evaluated by the governing body of the County and each municipality in the County, the nonprofit corporation and the Authority based on the materials submitted. Applicants will be notified of the timely receipt and status of their application(s).

(b) No additional information shall be accepted after the application submission deadline, unless specifically requested by Authority staff for clarification of information provided in the application received by the published application submission deadline.

(c) Ineligibility: An application, in whole or in part, may be declared ineligible by the Authority pursuant to Paragraphs IV (2) (a-e). The Authority may determine that a project site or facility is not viable or practical if the projects fail to adequately meet the Authority's evaluation criteria.

(4) APPLICATION EVALUATION. Each eligible application shall be evaluated based on the information provided in the application and in accordance with this part.

(5) UNFUNDED AND INELIGIBLE APPLICATIONS. Any unfunded or ineligible application shall remain on file in accordance with Public Records retention requirements.

(6) APPLICATION FORM. The EDA Program Application Form is available from the County Manager's Office at 412 W. Orange Street, Room 103, Wauchula, FL 33873.

V. EVALUATION CRITERIA. A priority listing of all project applications, including consideration of the information received from the County, the municipalities, the nonprofit corporation, if any, and the public, by ranking each project relative to the others and shall establish funding levels and any appropriate special conditions for each individual project. The priority listing shall be assigned to each eligible application after an evaluation according to the application criteria which follows:

(1) GENERAL CRITERIA.

(a) Sufficient administrative capability to administer the grant.

(b) The public good or public benefit generated by the project.

(c) The direct private investment stimulated by the project.

(d) The use of County matching Funds on the project.

- (e) Geographic and demographic diversity in the disbursement of grant awards.
 - (f) Compatibility with countywide economic development and infrastructure priorities.
 - (g) Financial capacity to carry the project costs until reimbursement is received.
 - (h) Professional and technical service availability to carry out the project.
- (2) Other factors that shall be considered include the following:
- (a) The long-term economic benefit of the project or activity to the applicant community.
 - (b) The expected time frame for such economic benefit to be realized and the attendant risks related to the likelihood of such realization.
 - (c) The additional economic benefit and/or private sector jobs created or retained which may occur as a result of other capital investment(s) that may be facilitated by the completion of the project.
 - (d) The importance of the grant to the completion, execution and/or implementation of the project.

VI. GRANT ADMINISTRATION. The following constitutes procedures for administration of program grants:

(1) **GRANT AWARD AGREEMENT.** After the Authority appropriates grant funds, the Authority and grantee shall enter into a Grant Award Agreement which sets forth the responsibilities and duties of each regarding administration of the approved project. The Grant Award Agreement shall contain terms and conditions particular to each project. Grant Award Agreements are not transferable.

(2) **PAYMENT BASIS.** Grantees shall be paid program funds by the Authority subject to the following conditions:

(a) **Project Costs.** Payment of project costs shall be reimbursed quarterly as provided for in these guidelines and in the Grant Award Agreement. Project costs may be reimbursed more frequently than quarterly upon determination by the Authority and inclusion in the Grant Award Agreement. Costs shall be incurred between the effective date of, and the project completion date identified in, the Grant Award Agreement except for pre-agreement costs. Costs for appraisals, appraisal review, surveys (boundary and topographic), title searches, and project signs are eligible project expenses. If the total cost of the project exceeds the grant amount and the required match, the grantee must pay the excess cost.

(b) Cost Limits. Project planning expenses, such as architectural and engineering fees, permitting fees, project inspection, and other similar fees, are eligible project costs provided that such costs do not exceed fifteen percent of the project cost.

(c) Retention. The Authority shall retain ten percent of the grant until the grantee completes the project and the Authority approves the completion documentation set forth in these guidelines. This retention requirement may be waived by the EDA in the Grant Award Agreement.

(3) ACCOUNTABILITY. The following procedures shall govern the accountability of program funds:

(a) Accounting System. Each grantee shall maintain an accounting system which meets generally accepted accounting principles and shall maintain financial records to properly account for all program and matching funds.

(4) REVERTED PROJECT FUNDS. EDA funds remaining after termination of a grant award or grantee completion of project shall revert to the Authority. If any funds awarded during a funding cycle are not accepted by the grantee or become available before termination of the fiscal year for which they were appropriated, the Authority may authorize the funds be carried forward for use by any succeeding cycle/year.

(5) INFRASTRUCTURE PROJECTS. The following constitutes the specific procedures for administration of infrastructure projects:

(a) Grant Period. The grantee will have up to three years from the start of the fiscal year in which funds are appropriated to complete the project. If the project is not completed within three years from the start of the fiscal year in which funds are appropriated, the contract shall be terminated and the project funds shall be reverted to the Authority, unless the Authority authorizes an amendment to extend the project agreement.

(b) Commencement Documentation. Prior to commencement of project construction, the grantee shall submit for approval the documentation described in the Commencement/Reimbursement Documentation Form available from the County Manager's Office at 412 W. Orange Street, Room 103, Wauchula, FL 33873.

(c) Completion Documentation. Upon completion of the project and prior to release of the final payment, the grantee shall submit all documentation described in the Project Completion Documentation Form available from the County Manager's Office at 412 W. Orange Street, Room 103, Wauchula, FL 33873.

(d) Inspections. The Authority shall have the right to perform an on-site inspection of the project site to ensure compliance with the Grant Award Agreement prior to release of the final grant payment.

VII. COMPLIANCE RESPONSIBILITIES. The following constitutes the general requirements for program compliance:

(1) **SITE DEDICATION.** Land owned or under site control by the grantee, which is developed for infrastructure with EDA funds, shall be dedicated for public use.

(2) **MANAGEMENT OF PROJECT SITES.** Grantees shall ensure by site inspections that facilities on project sites developed with EDA funds are being constructed, operated and maintained. All project sites shall be open for inspection at reasonable times and shall be managed in a safe and attractive manner.

(3) **NON-COMPLIANCE.** The Authority shall terminate a Grant Award Agreement for non-compliance by a grantee with the terms stated in the Grant Award Agreement or these guidelines. If the grantee fails to comply with the provisions of this part or the Grant Award Agreement, the Authority shall declare the grantee ineligible for further participation in EDA until such time as compliance has been obtained.

(4) **POST COMPLETION INSPECTIONS.** Authority staff shall have the right to perform an on-site inspection of completed program sites to ensure compliance with program requirements as stated in these guidelines.

Creation: Senate Bill 3110, House Bill 1303, and House Bill 1627
 Specific Authority: 211.3101(3)(b)3 FS
 Adopted by Board: May 02, 2006
 Amended: March 25, 2008
 December 21, 2010

EXHIBIT C

Criteria for Measurement of Achievement of Terms Agreed to Under the Infrastructure Program

Financial Reporting Procedures for Quarterly Reports and Reimbursement

The financial reporting procedure establishes guidelines for grant funds disbursed through the EDA. The procedures set forth principles for determining eligible costs, supporting documentation and minimum reporting requirements to assist both parties in receiving appropriate and timely reimbursement.

Grant funds shall be reimbursed in accordance with good cash management principles as identified by law. The reimbursement shall include only expenditures related to the project elements and the period as identified in the agreement. The County shall submit the attached quarterly progress report and reimbursement request forms to request reimbursement on an annual quarterly basis. The forms must contain all the information as requested. Each cost should clearly reflect the project element and a brief description of work performed. The office shall retain up to 10% of its obligations to ensure compliance with the agreement terms and conditions. Retained funds shall be released upon satisfactory completion of the project.

Documents that support the reimbursement shall be retained as described in Section 7.0 of the Agreement.

Reimbursement Request Package

Recipient Details

1. Grant/Recipient _____
2. Project Number _____ Date of Request _____
3. Disbursement Request Number _____
4. Type of Request: Partial _____ Final _____
5. Federal Employer Identification Number _____
6. Send Remittance to: _____

Reimbursement Details

(Cumulative amounts)

- | | | |
|---|----|--|
| 1. Architectural and Engineering (attach invoices) | \$ | |
| 2. Permitting (attach invoices) | \$ | |
| 3. Construction and/or Demolition (attach <u>invoices</u>) | \$ | |
| 5. Other (list - must be specified in agreement) | \$ | |
| | | |
| 6. Total Cumulative to Date | \$ | |
| 7. Less Retainage (10%) (not required for government entities) | \$ | |
| 8. Less Previous Disbursements | \$ | |
| 9. Amount requested for disbursement (line 6 minus line 7 & 8) | \$ | |

Requests for Invoices already Paid:

- 1) Copy of Invoice
- 2) Proof of Payment

**** SUBMIT ONE ORIGINAL COPY OF THIS FORM AND SUPPORTING DOCUMENTATION TO: ****

Hardee County Economic Development Authority
 C/O County Manager's Office
 412 W. Orange St., Suite 103
 Wauchula, FL 33873
 P: 863-773-9430; F: 863-773-0958

County Agreement Administrator Certification of Reimbursement Request

I, _____ ,
(Name of Grantee's County Agreement Administrator Designated in the Agreement)

on behalf of _____ , do hereby certify that:
(Name of Grantee/Recipient)

1. The disbursement amount requested on page 1 of this form is for allowable costs for the project described in the Agreement.
2. Materials, labor, equipment, and/or services representing costs included in the amount requested have been satisfactorily purchased, performed, or received, and applied toward completing the project; such costs are documented by invoices or other appropriate documentation, which are filed in the Grantee's permanent records.
3. The Grantee is required to pay such costs under the terms and provisions of contracts relating directly to the project, and the Grantee is not in default on any terms or provisions of the contracts.
4. All funds received to date have been applied toward completing the project.
5. All permits and approvals required for the construction, which is underway, have been obtained.

(Signature of County Agreement Administrator)

(Date)

PROJECT STATUS REPORT

Project NAME: _____ Project Number: _____

PROJECT ELEMENTS WORK ACCOMPLISHED % COMPLETED

PROBLEMS ENCOUNTERED/COMMENTS

Period Covered
(Check Appropriate Period)

_____	January through March	:	Due April	15 th
_____	April through June	:	Due July	15 th
_____	July through September	:	Due October	15 th
_____	October through December	:	Due January	15 th

County Agreement Administrator: _____

Signature _____ Date _____

Unit# 42

VIN# 1FVACXDT5GHH4895

2016 Freightliner Bucket Truck w/ Altec Body & Boom





CITY COMMISSION AND CRA BOARD WORKSHOP MINUTES

Monday, July 07, 2025 at 5:00 PM

Historic City Hall, Commission Chambers – 225 East Main Street, Suite 105

www.cityofwauchula.gov

INVOCATION

PLEDGE OF ALLEGIANCE

CALL TO ORDER

Nadaskay called the workshop to order at 5:00 pm.

ROLL CALL

PRESENT

Commissioner Anne Miller
Mayor Pro Tem Russell Smith
Mayor Keith Nadaskay
Commissioner Sherri Albritton
Commissioner Gary Smith

STAFF PRESENT

City Manager Olivia Minshew
Deputy City Manager John Eason
Assistant City Manager Sandee Braxton
City Clerk Stephanie Camacho
CRA Director Jessica Newman
Director of Projects and Procurement Ward Grimes
Community Development Director Kyle Long
Chief of Police Ron Curtis

OPEN COMMISSION WORKSHOP

Nadaskay opened the Commission workshop.

1. ITN 25-01 Self Insured Pools Bid Recommendation

Minshew presented the recommendation to award the bid to Public Risk Management (PRM). Minshew provided a breakdown of recommended benefit options, selected by the Insurance Review Committee. Minshew also stated the City wished to cease the current agreement with Acentria as the City's agent of record.

Paul Hebert - World Risk Management
Hebert was present to answer any questions from the Commission.

2. Hardee County BOCC - US Highway 17 Property Development

County Manager Terry Atchley - Hardee County BOCC
Atchley addressed the Commission and explained the purpose of purchasing the

property on Highway 17 was to relocate the Sheriff's Office administrative building and jail complex due to the age, location, and poor condition of its current facility. Atchley stated a conceptual drawing had circulated with the community however, nothing had been finalized yet and the County planned to go through the PUD process which would be brought back to the Commission. Atchley stated the sheriff's office and jail was already fully funded.

Albritton inquired about additional funding for other facilities at this location. Atchley stated a crisis stabilization unit was in consideration, which would also require a PUD process with Commission approval.

A representative from Tri-County Human Services was present and answered questions from the Commission. Discussion revealed this would be a residential facility. Albritton asked what would happen when the residents were released and it was explained that they would have an agreement with the sheriff's office to make an attempt to take the people back to their last known address.

Another concern from the Commission was that the property along Highway 17 would not be available for commercial properties if they were all designated as public/semi-public. Atchley explained the frontage was limited due to the large retention pond and there was discussion with FDOT about relocating that pond however, the County would have to come up with another \$5,000,000-\$6,000,000 in order to do that.

The issue of additional traffic was also mentioned, as well as the impact a jail and crisis stabilization unit may have in that area. The question was asked if this project would be better located near the hospital.

Denise Grimsley - The Development Group / Hardee County IDA/EDA
Grimsley explained the State requirements that must be met before a patient could be released from the facility.

Atchley added that the CSU was also fully funded.

Atchley also explained the County was interested in keeping the portion of the property along Heardbridge Rd as residential zoning to allow for apartments to be built in order to provide housing for law enforcement personnel.

Mark Gilliard - 932 Heardbridge Rd

Gilliard shared his concern of zoning the property public/semi-public and not having control over certain facilities being implemented, as well as the additional traffic that would be added to Heardbridge Rd. Gilliard stated he didn't feel like this project goes along with The Development Group's Building A Vibrant Community study or with the vision of the City.

Sheriff Vent Crawford - Hardee County Sheriff's Office

Crawford was also present and answer questions from the Commission.

3. Fund Balance Request for Tennessee & Alabama Paving Projects

Minshew stated the City had recently went out to bid for repaving Tennessee and Alabama streets. Minshew explained the bids came back and the City was still in need of approximately \$120,000 to cover the lack of grant funds for these projects. Minshew provided the option to use the dollars from the fund balance in order to complete both projects.

4. ITB 25-01 Award Recommendation

5. ITB 25-02 Award Recommendation

Long presented items 4 and 5, recommending to award both projects to Cobb Site Development.

6. RFQ 25-01 CEI Services - Alabama Street Resurfacing Project

7. RFQ 25-02 CEI Services - Tennessee Street Resurfacing Project

Long presented the bid documents for items 6 and 7.

8. School Zone Side Road Flashing Lights

9. Ordinance 2025-11 Annexation of 572 Stenstrom Rd

Long presented the ordinance to the Commission explaining this property was split into two separate parcels, one in City jurisdiction and the other in County jurisdiction. Long stated the property owner was requesting to annex the County parcel into the City in order to combine the two parcels under one parcel ID.

CITY ATTORNEY REPORTS

No report.

CITY MANAGER REPORT

Report given.

CITY COMMISSIONER REPORTS

No report.

CLOSE COMMISSION WORKSHOP

Nadaskay closed the Commission workshop.

OPEN CRA WORKSHOP

Nadaskay opened the CRA workshop.

10. Florida Voluntary Cleanup Tax Credits Agreement

Newman presented the agreement to the Board.

ADJOURNMENT

With no further business to discuss, Nadaskay adjourned the workshop at 6:49 pm.



CITY COMMISSION AND CRA BOARD MEETING MINUTES

Monday, July 14, 2025 at 6:00 PM

Historic City Hall, Commission Chambers – 225 East Main Street, Suite 105

www.cityofwauchula.gov

INVOCATION

PLEDGE OF ALLEGIANCE

CALL TO ORDER

Nadaskay called the meeting to order at 6:00 pm.

ROLL CALL

PRESENT

Commissioner Anne Miller
Mayor Pro Tem Russell Smith
Mayor Keith Nadaskay
Commissioner Sherri Albritton
Commissioner Gary Smith

STAFF PRESENT

City Manager Olivia Minshew
Deputy City Manager John Eason
Assistant City Manager Sandee Braxton
Community Development Director Kyle Long
Assistant Chief of Police Tom Fort
Director of Projects and Procurement Ward Grimes

APPROVAL OF AGENDA

Motion made by Commissioner Albritton, Seconded by Commissioner Miller.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner G. Smith

MINUTES FOR APPROVAL

1. Minutes for May 5, 2025 Workshop, May 12, 2025 Meeting, June 2, 2025 Workshop, and June 9, 2025 Meeting

Recommended Action: Commission's Approval

Motion made by Commissioner G. Smith, Seconded by Commissioner Albritton.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

PUBLIC COMMENT / NON-AGENDA ITEMS

None presented.

ORDINANCES / PUBLIC HEARINGS

2. Ordinance 2025-04 FLU Map Amendment for Hardee County BOCC Property on US Highway 17 – Second Reading – Public Hearing

Recommended Action: Commission's Approval

Nadaskay opened the public hearing.

Mark Gilliard - 932 Heardbridge Rd Wauchula, FL

Gilliard thanked the Commission for taking time to discuss and listen to his feelings regarding this project. Gilliard further explained that he felt like there should have been a committee implemented by the County, as well as community involvement, before moving forward with the decisions surrounding this project. Gilliard recommended a 60 days pause to gather more information and considerations.

Grant Bonds - 1002 Saunders Ln Wauchula, FL

Bonds stated his father previously owned a business in the area where the current Sheriff's Office is located. Bonds recalled increased traffic and other negative impacts on the neighbors when the office was put in there. He stated he believed there were other options that could be considered.

Ruben Rivas - 1347 Tustenugee Trl Wauchula, FL

Rivas stated he was against this zoning request and also suggested a 60 day pause to look more into the project options.

Tim Wells - 398 Bostick Rd Bowling Green, FL

Wells stated he did not live in the area affected by this project however, he did not feel like this was the best use of the land and thought it would be better served as a use that could generate a tax base within the County. He agreed that a new Sheriff's Office was needed but thought a different location should be considered.

Donald Chancey - PO Box 845 Wauchula, FL

Chancey stated he was in agreeance that a new Sheriff's Office complex was necessary however, he believed a site evaluation committee needed to be formed in order to evaluate different site locations in order to find the best site for this project.

With no further discussion from the public, Nadaskay closed the public hearing.

Hatcher-Bolin read the ordinance by title.

For the purpose of opening discussion, R. Smith approved the motion, seconded by Albritton.

The Commission inquired about the County's timeline, considering the option to delay this item.

Atchley explained where they were in the process and the deadlines for the grant agreements.

Discussion was at length. It was the consensus of the Commission to delay voting on this item until the October 13, 2025 meeting and, in that time, a committee was to be formed.

R. Smith motioned to amend his vote and to table this ordinance until the October 13, 2025 Commission meeting, seconded by Albritton.

Voting yea: Commissioner Miller, Mayor Nadaskay, Commissioner G. Smith

Motion to approve the amended motion made by Mayor Pro Tem R. Smith, Seconded by Commissioner Miller.

Voting Yea: Mayor Nadaskay, Commissioner Albritton, Commissioner G. Smith

3. Ordinance 2025-11 Annexation of 572 Stenstrom Rd - First Reading

Recommended Action: Commission's Approval

Hatcher-Bolin read the ordinance by title.

Motion made by Commissioner Albritton, Seconded by Commissioner G. Smith.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

CITY MANAGER / NON-CONSENT

4. Power Cost Adjustment

Minshew announced the June power cost adjustment.

5. Proclamation 2025-05 First Responder Appreciation Day

Recommended Action: Commission's Approval

Tim Staton presented the proclamation to the Commission.

Motion made by Commissioner G. Smith, Seconded by Commissioner Albritton.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

6. Resolution 2025-10 Adopting the 2025 Hardee County Multi-Jurisdictional Local Mitigation Strategy Plan

Full LMS plan available at: <https://www.hardeecountyfl.gov/departments-services/public-safety/emergency-management/>

Recommended Action: Commission's Approval

Lane Schneider - Hardee County Emergency Management

Schneider addressed the Commission and explained the resolution, which would make it possible for the City to receive certain types of emergency and nonemergency disaster assistance through federal funding.

Motion made by Commissioner Albritton, Seconded by Commissioner Miller.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner G. Smith

7. Resolution 2025-11 Setting the Proposed Millage Rate for 2025-2026 FY

Recommended Action: Commission's Discretion

Minshew explained the 2025-2026 budget was balanced using the rollback rate of 5.0794 at the budget workshop however they added that rate may not be the most viable number considering the proposed budget was utilizing fund balance for certain projects/purchases. Braxton presented several options that Commission could consider, explaining they could advertise a higher millage rate for the property appraiser's TRIM notice but then lower it at the final budget hearing, if they so choose. Minshew stated staff was not recommending a rate higher than 8%. The Commission discussed the options.

Motion made by Mayor Pro Tem R. Smith to set the proposed millage rate to 6.5 mills, Seconded by Commissioner Albritton.

Voting Yea: Commissioner Miller, Mayor Nadaskay

Voting Nay: Commissioner G. Smith

8. Designation of a Voting Delegate for the 2025 FLC Annual Conference

Recommended Action: Commission's Discretion

Nadaskay recommended designating Minshew as the voting delegate, as she was planning to attend the conference.

Motion made by Commissioner Albritton to designate Minshew as the voting delegate, Seconded by Commissioner G. Smith.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

CONSENT AGENDA

9. Resolution 2025-09 FDOT Supplemental Agreement - Tennessee Street

10. ITN 25-01 Self Insured Pools Bid Recommendation

11. Fund Balance Request for Tennessee & Alabama Paving Projects

12. ITB 25-01 Award Recommendation

13. ITB 25-02 Award Recommendation
14. RFQ 25-01 CEI Services - Alabama Street Resurfacing Project
15. RFQ 25-02 CEI Services - Tennessee Street Resurfacing Project

Recommended Action: Commission's Approval on Items 9-15

Motion made by Commissioner Albritton, Seconded by Mayor Pro Tem R. Smith.

Voting Yea: Commissioner Miller, Mayor Nadaskay, Commissioner G. Smith

CITY ATTORNEY REPORTS

No report.

CITY MANAGER REPORT

Report given.

CITY COMMISSIONER REPORTS

No report.

RECESS COMMISSION MEETING – CONVENE CRA BOARD MEETING

CRA AGENDA

16. Approval of Minutes for May 12, 2025 Meeting, June 2, 2025 Workshop, and June 9, 2025 Meeting

Recommended Action: Board's Approval

Motion made by Commissioner Miller, Seconded by Commissioner G. Smith.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner Albritton

17. TIF Program Extension Request - 312 Diana Ave Project
Requesting to extend from July 1, 2025 to September 1, 2025

Recommended Action: Board's Approval

Motion made by Commissioner Miller, Seconded by Commissioner G. Smith.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner Albritton

18. Florida Voluntary Cleanup Tax Credits Agreement

Recommended Action: Board's Approval

Motion made by Commissioner Miller, Seconded by Commissioner Albritton.

Voting Yea: Mayor Pro Tem R. Smith, Mayor Nadaskay, Commissioner G. Smith

ADJOURN CRA BOARD MEETING – RECONVENE COMMISSION MEETING

19. Approval of CRA Board's Actions

Recommended Action: Commission's Approval

Motion made by Commissioner G. Smith, Seconded by Commissioner Albritton.

Voting Yea: Commissioner Miller, Mayor Pro Tem R. Smith, Mayor Nadaskay

REMINDERS

ADJOURNMENT

With no further business to discuss, Nadaskay adjourned the meeting at 7:43 pm.

Mayor Richard K. Nadaskay

City Clerk Stephanie Camacho

**WAUCHULA COMMUNITY REDEVELOPMENT AGENCY
CRA RESOLUTION NO: 2025-01**

A RESOLUTION OF THE CITY OF WAUCHULA COMMUNITY REDEVELOPMENT AGENCY ADOPTING A BUDGET FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2025, AND ENDING SEPTEMBER 30, 2026; MAKING FINDINGS; AUTHORIZING AMENDMENTS; PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Wauchula Community Redevelopment Agency (the "CRA") is a political body and dependent special district established by ordinance pursuant to Part III, Chapter 163, Florida Statutes; and,

WHEREAS, as a dependent special district, the CRA has submitted a budget for the CRA's Fiscal Year beginning October 1, 2025 and ending September 30, 2026, to the City Commission pursuant to section 189.016, Fla. Stat.; and

WHEREAS, the City Commission, acting as the CRA, viewed the projected expenditures for fiscal year 2025/2026 budget; and,

WHEREAS, the budget includes the estimated expenditures necessary to carry out the functions of the CRA for the Fiscal Year beginning October 1, 2025, and ending September 30, 2026; and,

WHEREAS, the budget includes the estimated revenues to be received by the CRA during said period from all sources, including increment revenue and any amounts carried over from prior fiscal years; and,

WHEREAS, the CRA has examined and carefully considered the proposed budget in a duly assembled, properly noticed, public meeting; and,

WHEREAS, having observed all appropriate procedures required by Florida Statutes, the Commission, acting as the Community Redevelopment Agency, deems it necessary, proper, and in the best interest of the public to adopt said budget.

NOW, THEREFORE BE IT RESOLVED BY THE WAUCHULA COMMUNITY REDEVELOPMENT AGENCY FOR THE CITY OF WAUCHULA, FLORIDA:

SECTION 1. The CRA does hereby adopt, confirm and approve the budget attached hereto as Exhibit "A" as the budget for the CRA for the Fiscal Year beginning October 1, 2025 and ending September 30, 2026.

SECTION 2. The governing board of the CRA does hereby find that:

- (1) The budget adopted in Section 1 has been prepared in accordance with generally accepted accounting principles; and
- (2) The estimated revenues to be received by the CRA during the Fiscal Year beginning October 1, 2025, and ending September 30, 2026 from all sources, including increment revenue and any amounts carried over from prior fiscal years, equals the total of appropriations for expenditures and reserves in the budget during said period; and
- (3) The budget, as such budget may be amended from time to time, will govern expenditures of the CRA and no expenditures shall be made nor contracts for expenditures be entered into except in pursuance of budgeted appropriations; and,
- (4) The budget is adopted in accordance with Section 189.016, Florida Statutes.

SECTION 3. Any changes to the budget made by the City official responsible for financial issues, other than correction of errors, shall be reported to the City Manager and the CRA Director on at least a quarterly basis. Any amendments to the budget shall be made in accordance with Section 189.016, Florida Statutes.

SECTION 4. This resolution shall take effect immediately upon its adoption by the governing board of the CRA.

On Motion of Commissioner _____, seconded by Commissioner _____, the above resolution was introduced and approved by the City of Wauchula Community Redevelopment Agency on the _____ day of _____, 2025.

ATTEST:

**WAUCHULA COMMUNITY
REDEVELOPMENT AGENCY**

By: _____

Stephanie Camacho, City Clerk

By: _____

Richard Keith Nadaskay, Jr., Chair

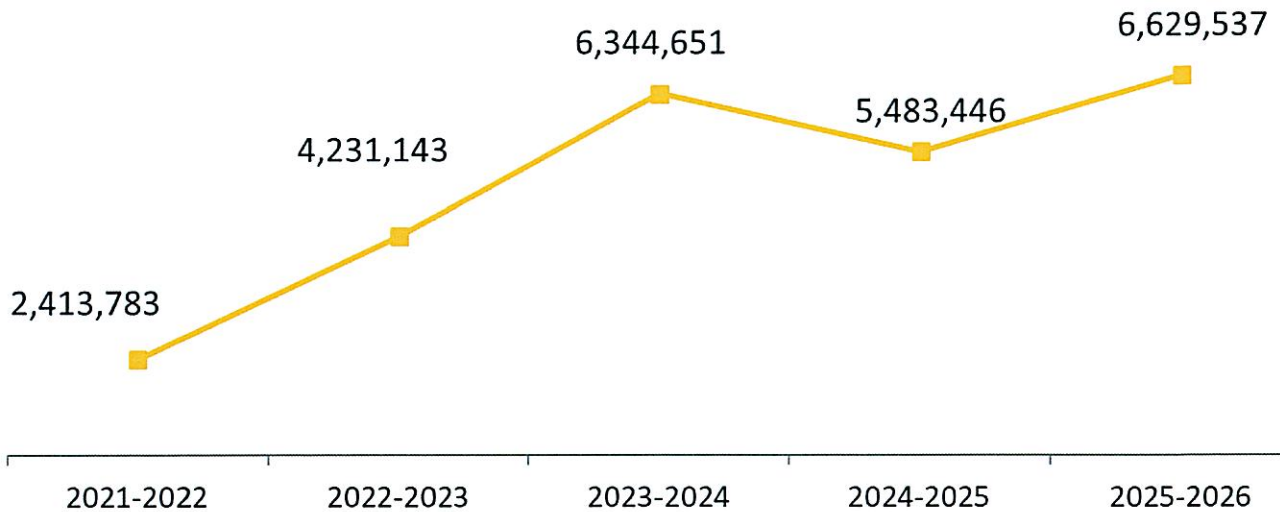
APPROVED AS TO FORM:

By: _____

Kristie Hatcher-Bolin, City Attorney

COMMUNITY REDEVELOPMENT AGENCY FUND

BUDGET HISTORY



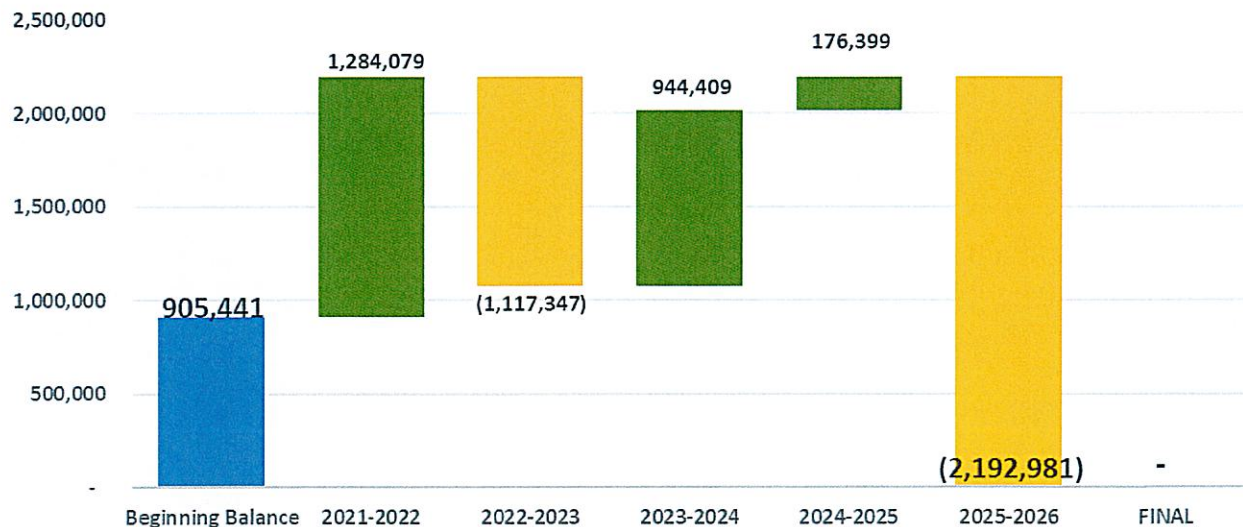
REVENUES BY TYPE

Grants	\$	2,867,458	43.25%
Tax Increment Financing	\$	1,549,098	23.37%
Reserves	\$	2,192,981	33.08%
Miscellaneous	\$	20,000	0.30%
Grand Total	\$	6,629,537	

EXPENDITURES BY TYPE

Personnel	\$	114,725	1.73%
Operating	\$	164,812	2.49%
Capital	\$	6,115,000	92.24%
Grants & Aid	\$	235,000	3.54%
Grand Total	\$	6,629,537	

CHANGE IN FUND BALANCE



COMMUNITY REDEVELOPMENT AGENCY FUND LINE-ITEM DETAIL

	2021-2022 ACTUAL	2022-2023 ACTUAL	2023-2024 ACTUAL	2024-2025 BUDGET	2025-2026 BUDGET
REVENUES					
GRANT PROCEEDS					
103-334490 DEO- AUDITORIUM PARKING	39,900	42,156	327,393	-	-
103-334740 RTP- PEACE RIVER PARK	-	-	200,000	-	-
103-334780 STATE LEG APP- FARR FIELD	-	-	11,080	2,867,458	2,867,458
103-334770 HIST PRES- AUDITORIUM	-	-	70,500	-	-
103-337400 IDA- AUDITORIUM PARKING	39,900	42,156	717,268	-	-
TOTAL GRANT PROCEEDS	571,231	544,727	1,326,241	2,867,458	2,867,458
INTEREST EARNINGS					
103-361121 INTEREST -- CRA MM	3,838	43,018	36,540	10,000	20,000
TOTAL INTEREST EARNINGS	3,838	43,018	36,540	10,000	20,000
DISPOSITION OF ASSETS					
103-364000 SALES-DISPOSITION OF ASSETS	165,000	-	-	-	-
103-364200 SALE OF PROPERTY	-	-	602,705	-	-
103-364210 SALE OF VCTC	-	35,333	-	15,000	-
TOTAL DISPOSITION OF ASSETS	165,000	35,333	602,705	15,000	-
CONTRIBUTON & DONATION					
103-366300 Cont. Hardee Co. TIF	543,172	662,538	779,010	778,663	875,000
TOTAL CONTRIBUTON & DONATION	543,172	662,538	779,010	778,663	875,000
INTERFUND TRANSFERS					
103-381200 TIF TRANSFER FROM GEN	342,766	418,091	460,696	535,133	674,098
103-381800 TRANS FROM CRA RES	-	-	-	1,277,192	2,192,981
TOTAL INTERFUND TRANSFERS	342,766	418,091	460,696	1,812,325	2,867,079
TOTAL REVENUES	2,059,161	1,703,707	3,205,193	5,483,446	6,629,537

	2021-2022 ACTUAL	2022-2023 ACTUAL	2023-2024 ACTUAL	2024-2025 BUDGET	2025-2026 BUDGET
WAUCHULA CRA					
PERSONNEL SERVICES					
103-584-51100 EXECUTIVE SALARIES	63,170	63,453	68,562	70,612	75,084
103-584-52100 FICA	755	755	815	1,028	1,099
103-584-52200 RETIREMENT	6,270	2,394	10,537	7,914	7,078
103-584-52300 HEALTH INSURANCE	20,883	22,467	24,196	26,349	30,480
103-584-52320 WELLNESS PROGRAM	649	707	641	300	700
103-584-52400 WORKERS COMP	201	212	222	210	252
103-584-52450 AD & D POLICY	32	33	33	32	32
TOTAL PERSONNEL SERVICES	91,960	90,022	105,007	106,444	114,725
OPERATING EXPENSE					
103-584-53100 PROF SERVICES - GENERAL	33,513	12,627	60,593	15,000	15,000
103-584-53150 ACCOUNTING & AUDITING	11,545	3,870	9,784	4,076	4,200
103-584-53200 CRA MASTER PLAN	-	-	-	75,000	-
103-584-53400 CONTRACTUAL SERVICES	57,974	58,219	68,550	99,170	88,400
103-584-53436 BROWNFIELD CLEANUP	50,506	187,062	77,302	6,000	25,000
103-584-54000 TRAVEL & PER DIEM	-	1,302	1,430	2,000	2,000
103-584-54100 COMMUNICATIONS	963	963	965	960	960
103-584-54400 RENTALS & LEASES	12,000	12,000	11,000	12,000	12,000
103-584-54500 INSURANCE	2,369	1,001	1,059	1,072	1,287
103-584-54700 PRINTING & BINDING	1,031	2,142	2,470	2,000	3,600
103-584-55100 CRA OFFICE SUPPLIES	-	407	1,678	500	500
103-584-55200 OPERATING SUP & EXP	6,599	6,425	7,660	6,208	8,800
103-584-55400 BOOKS, PUB & ED	1,315	1,315	1,335	3,015	3,065
TOTAL OPERATING EXPENSE	182,033	287,333	243,825	227,001	164,812

	2021-2022 ACTUAL	2022-2023 ACTUAL	2023-2024 BUDGET	2024-2025 BUDGET	2025-2026 BUDGET
CAPITAL EXPENSE					
103-584-56200 BUILDINGS- AUDITORIUM	-	287,551	97,784	350,000	-
103-584-56220 IN-FILL HOUSING	1,575	461,925	43,422	1,050,000	1,245,000
103-584-56310 AUDITORIUM PARKING LOT	79,799	84,312	1,111,004	-	-
103-584-56320 POWER PLANT REPURPOSE	-	-	-	-	1,000,000
103-584-56331 1ST AVE WATER/SEWER EXT	-	-	-	-	200,000
103-584-56558 SIDEWALKS & ST LIGHTS	-	-	-	15,000	100,000
103-584-56560- FARR FIELD COMPLEX	76,084	5,535	11,080	3,500,000	3,500,000
103-584-56564 CREWS PARK	33,680	12,839	661,878	-	-
103-584-56565 PEACE RIVER PARK	26,092	1,430,711	109,506	-	-
103-584-56576 HERITAGE PARK ELECTRICAL	-	-	-	-	70,000
TOTAL CAPITAL EXPENSE	409,497	2,282,872	2,034,674	4,915,000	6,115,000
GRANTS & AIDS					
103-584-58110 GRANTS - COMMERCIAL	58,586	-	28,888	200,000	200,000
103-584-58220 PUBLIC RELATIONS	33,000	35,000	35,000	35,000	35,000
TOTAL GRANTS & AIDS	91,586	35,000	63,888	235,000	235,000
TOTAL WAUCHULA CRA EXPENSES	775,076	2,695,227	2,447,394	5,483,446	6,629,537

City Manager Performance Evaluation
City of Wauchula
Evaluation Period: October 1, 2024 – September 30, 2025
** Commissioners **

	AM	RS	KN	SA	GS
1. Fiscal Management	5	5	5	5	
2. Management and Organization	4	5	5	5	
3. Program Development and Follow-Through	4	5	5	5	
4. Citizen Relations	5	5	5	5	
5. Communication with Commission	5	5	5	5	
6. Supervision	5	5	5	5	
7. Intergovernmental and Community Relations	4	5	5	5	
8. Professional Characteristics and Skills	5	5	5	5	
Total Scores:	37	40	40	40	

Average Total: (200/5)



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshew
Title:	City Manager
Department:	Administration
Evaluator:	Anne Miller
Evaluation Period:	10/1/2024 to 9/30/2025

Evaluation Instructions

This evaluation is intended to provide The Commission and City Manager with an accurate and objective assessment of performance during the evaluation period.

Scoring

- Rate each factor in each section on a scale of **0 to 5**.
- Add the scores together and divide by the number of factors to determine the average score for that section.
- Round scores: .5 and above round up; below .5 round down.

Comments

- Use the comment section to provide specific feedback.
- Include praise for strengths and suggestions for improvement where applicable.

Feedback

- After totaling scores, the evaluator should provide a summary of the employee's overall performance.
- The employee will then have the opportunity to share their own perspective on their performance in relation to the evaluation results.

Signatures

- Once the feedback session is complete, both the evaluator and the employee must sign the evaluation.
- The original signed evaluation should be forwarded to the Human Resources Department for inclusion in the employee's personnel file.

Performance Rating Definitions

- **Exceptional (5 points):** Consistently and significantly exceeds all reasonable expectations in every area of the rating category.
- **Good (4 points):** Frequently surpasses reasonable expectations in the rating category without deficiencies.
- **Satisfactory (3 points):** Meets reasonable expectations and demonstrates acceptable competence in all aspects of the rating category.
- **Fair (2 points):** Meets only the minimum expectations. Improvement is needed in some areas to fully meet performance standards.
- **Unsatisfactory (1 point):** Occasionally meets minimum expectations but requires frequent assistance and supervision.
- **Unacceptable (0 points):** Fails to meet minimum expectations even with ongoing assistance and supervision. **Employment with the City is at risk.**

1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	5
Prepares a budget recommendation in an intelligent and accessible format	5
Ensures actions and decisions reflect responsibility for short and long-term planning	5
Monitors and manages fiscal activities within organizational constraints	5
Reviews city equipment and property for future planning and replacement	4
Section Average Score	5

Comments

Ms. Minshew and Staff provided a proposed budget that was balanced and accounted for existing needs and desired improvements. The City has received multiple grants to fund needed infrastructure projects and community improvement projects, and Staff continues to look for opportunities for additional funding. Ms. Minshew and Staff responded to health insurance increases by reviewing options and recommending a change to continue coverage in a more cost-effective manner. Ms. Minshew and Staff also advised on financial trends and future concerns to consider.

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	5
Maintains knowledge of current developments in local government management	5
Demonstrates innovation and creativity	4
Anticipates and analyzes problems to develop effective solutions	4
Considers new ideas proposed by governing body members and/or staff	5
Sets a professional example by acting fairly and impartially	4
Keeps the Leadership Team informed of relevant regulations and constraints	4
Section Average Score	4

Comments

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	4

Develops new programs to address City Government challenges	4
Understands, supports, and enforces laws, policies, and ordinances	5
Makes prompt changes in programs or procedures when necessary	4
Section Average Score	4

Comments

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4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	5
Works to maintain citizen satisfaction with services	5
Communicates unfavorable information clearly and professionally	5
Section Average Score	5

Comments

Citizen concerns appear to be handled in a respectful manner. Ms. Minshew responded in a professional manner without defensiveness to a citizen who brought concerns to a Commission workshop. She addressed the citizen's concern with City employees. Likewise, she and Staff have analyzed citizens' specific infrastructure concerns, analyzed the options, and recommended solutions. I have not seen evidence of widespread citizen dissatisfaction.

5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	5
Ensures actions reflect the will of the Commission as a whole	5
Responds well to requests, advice, and constructive criticism	5
Discusses and researches Commission concerns and ideas	5
Reports progress and follows up appropriately	5
Sets meeting agendas that reflect governing body guidance	5
Section Average Score	5

Comments

Ms. Minshew is consistently well-prepared for Commission meetings and knowledgeable about City operations. She answers most questions/concerns immediately and follows up in a timely manner when needed. She and Staff research ideas that Commissioners request and return with information and/or a recommendation. She keeps Commissioners updated between meetings on events and items of interest.

6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	5
Respects staff ability and initiative	5
Develops friendly yet professional relationships with staff	5
Gains acceptance for new ideas and organizational changes	4
Encourages teamwork, innovation, and effective problem-solving	4
Interprets and administers City Personnel Policies	5
Section Average Score	5

Comments

Ms. Minshew is quick to praise Staff efforts and emphasize the team aspect of all accomplishments.

7. Intergovernmental and Community Relations

Performance Factor	Score (0-5)
Maintains a positive image within the community	4
Avoids unnecessary controversy	5
Avoids politics and partisanship	5
Cooperates with neighboring and higher-level government agencies	4
Represents the City effectively when speaking before groups or the press	5
Addresses difficult community issues	4
Defends the city and its reputation when appropriate	4
Section Average Score	4

Comments

Ms. Minshew represents the City of Wauchula well in organizations such as the FLC, FMEA, and FCCMA. She and City Staff continue to advocate for Wauchula and small towns with our government representatives. With the County planning multiple large capital projects inside the City limits, I would like to see additional coordination with the County to ensure our priorities align.

8. Professional Characteristics and Skills

Performance Factor	Score (0-5)
Diligent, thorough, and a self-starter	5
Exercises good judgment, enthusiasm, and cooperation	5
Exhibits professional composure, appearance, and attitude	5
Maintains knowledge of developments in local government management	5
Demonstrates innovation and creativity	4
Acts fairly and impartially in public office	4
Section Average Score	5

Comments

Total Score of All Sections

5

31

Evaluator's Comments

Overall, I have been impressed with Ms. Minshew's knowledge, professionalism, and management style. As a newer Commissioner, I have not personally witnessed her performance in all areas. There appears to be a generally positive environment among City Staff, and I am not aware of any significant deficiencies.

Signatures

Evaluator's Signature:	Date:
City Manager's Signature:	Date:
Human Resources Signature:	Date:



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshew
Title:	City Manager
Department:	Administration
Evaluator:	<i>Russell Smith</i>
Evaluation Period:	10/1/2024 to 9/30/2025

Evaluation Instructions

This evaluation is intended to provide The Commission and City Manager with an accurate and objective assessment of performance during the evaluation period.

Scoring

- Rate each factor in each section on a scale of **0 to 5**.
- Add the scores together and divide by the number of factors to determine the average score for that section.
- Round scores: .5 and above round up; below .5 round down.

Comments

- Use the comment section to provide specific feedback.
- Include praise for strengths and suggestions for improvement where applicable.

Feedback

- After totaling scores, the evaluator should provide a summary of the employee's overall performance.
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Performance Rating Definitions

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- **Unsatisfactory (1 point):** Occasionally meets minimum expectations but requires frequent assistance and supervision.
- **Unacceptable (0 points):** Fails to meet minimum expectations even with ongoing assistance and supervision. **Employment with the City is at risk.**

1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	
Prepares a budget recommendation in an intelligent and accessible format	
Ensures actions and decisions reflect responsibility for short and long-term planning	
Monitors and manages fiscal activities within organizational constraints	
Reviews city equipment and property for future planning and replacement	
Section Average Score	5

Comments

See Attached

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	
Maintains knowledge of current developments in local government management	
Demonstrates innovation and creativity	
Anticipates and analyzes problems to develop effective solutions	
Considers new ideas proposed by governing body members and/or staff	
Sets a professional example by acting fairly and impartially	
Keeps the Leadership Team informed of relevant regulations and constraints	
Section Average Score	5

Comments

See Attached

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	
Develops new programs to address City Government challenges	

Understands, supports, and enforces laws, policies, and ordinances	
Makes prompt changes in programs or procedures when necessary	
Section Average Score	5

Comments

See Attached

4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	
Works to maintain citizen satisfaction with services	
Communicates unfavorable information clearly and professionally	
Section Average Score	5

Comments

See Attached

5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	
Ensures actions reflect the will of the Commission as a whole	
Responds well to requests, advice, and constructive criticism	
Discusses and researches Commission concerns and ideas	
Reports progress and follows up appropriately	
Sets meeting agendas that reflect governing body guidance	
Section Average Score	5

Comments

See Attached

6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	
Respects staff ability and initiative	
Develops friendly yet professional relationships with staff	
Gains acceptance for new ideas and organizational changes	
Encourages teamwork, innovation, and effective problem-solving	
Interprets and administers City Personnel Policies	
Section Average Score	5

Comments

See Attached

7. Intergovernmental and Community Relations

Performance Factor	Score (0-5)
Maintains a positive image within the community	
Avoids unnecessary controversy	
Avoids politics and partisanship	
Cooperates with neighboring and higher-level government agencies	
Represents the City effectively when speaking before groups or the press	
Addresses difficult community issues	
Defends the city and its reputation when appropriate	
Section Average Score	5

Comments

See Attached

8. Professional Characteristics and Skills

Performance Factor	Score (0-5)
Diligent, thorough, and a self-starter	
Exercises good judgment, enthusiasm, and cooperation	
Exhibits professional composure, appearance, and attitude	
Maintains knowledge of developments in local government management	
Demonstrates innovation and creativity	
Acts fairly and impartially in public office	
Section Average Score	5

Comments

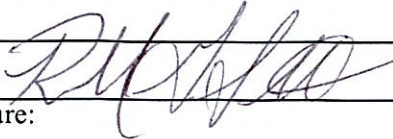
See Attached

Total Score of All Sections 40

Evaluator's Comments

See Attached

Signatures

Evaluator's Signature: 	Date: <u>9/3/2025</u>
City Manager's Signature:	Date:
Human Resources Signature:	Date:

Fiscal Management

5

Once again, Olivia and team presented a budget that was easy to understand, and realistic in nature. It addresses both short and long-term needs. However, it is a very tight budget that doesn't leave any margin for error or contingency. As a result, the commission is faced with making the unpopular decision to increase property taxes. I do not hold this against Olivia in any way as it is more a reflection of the economic conditions from last year: Rising energy costs, rising costs for replacement of equipment, construction materials, insurance premiums, and the impacts of last Hurricane Milton last year. Good job, given all the challenges the city faces.

Management and Organization

5

This past year saw the departure of former Chief of Police Brandon Ball and HR manager Terri Svendsen. Olivia and staff did a great job in creating a search committee to replace Chief Ball. The selection of the new Chief of Police, Dr. Ronald Curtis, has been a real plus for the city. His background and experience adds a greater level of depth to Olivia's staff. The HR manager position was filled in-house, and the addition of the deputy city clerk shows that we are developing our own talent without missing a beat. Great job once again!

Program Development and Follow-Through

5

Good job all around in this regard. Especially regarding the 22% increase in health insurance by developing a plan to move to the self-insured PRM pool. I continue to see good follow-through with the capital improvement plan and staffing needs in accordance with past adopted policies. The solid waste fee study and new fee schedule I feel addressed inequities born by the residential customers and now shifts the burden more fairly.

Citizen Relations

5

Good job and thank you for changing the after-hours utility dispatch. Also using social media to keep the public informed is a big plus and used effectively. I get fewer calls with needs from concerned citizens which tells me the city is being more proactive than reactive. Olivia stays active in community events and represents the city well.

Communication with Commission

5

Olivia is always quick to respond to me or to call me when an issue arises.

Supervision

5

Olivia doesn't micromanage. I can tell that new policies that come forth are developed by staff in their respective area of expertise as staff is allowed to present and speak to the commission regarding policy. I like how new employees are given a tour of the city and what each department does. Teamwork among staff is good; everyone knows their job and how they contribute. The fact that the city has received recognition at the state level for their achievements is a great indicator of Olivia's management style.

Intergovernmental and Community Relations

5

As I stated last year, if I could score Olivia a 10 here I would! Olivia has worked diligently to secure the City of Wauchula over \$23 million in funding for projects that are desperately needed and that we as a city wouldn't be able to do otherwise. As mentioned above, Olivia does a great job staying involved with the community and representing the City of Wauchula.

Professional Characteristics and Skills

5

Congratulations on being honored as FMEA Member of the Year, being named 2025 Home Rule Hero by FLC and continued actively participating with the FLC. Olivia remains humble and quick to give credit to her support staff and recognizes them whenever she can.

TOTAL

40

Evaluator's Comments:

The past year saw several projects finally come to completion and I look forward to seeing the many new projects get going. As I mentioned in last year's evaluation, I want to see the City of Wauchula become the growth and development in Hardee County. This year's budget was too tight for my comfort level. I respect that Olivia and staff did everything they could to balance the budget and make it work. Nonetheless, the commission finds itself having to increase its millage rate. Long-term, the only thing that is going to fix this issue is growth. That means annexation. We need to work more closely with the Hardee BOCC, IDA and other agencies to foster this growth. As a city and county, we lost population. We must figure out how to attract new residents. Fiscally, our debt is nearly paid off and we are in a sound position. But no city can survive with a shrinking population. Let's keep this in mind as we move forward.



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshew
Title:	City Manager
Department:	Administration
Evaluator:	Keith Nadaskay
Evaluation Period:	10/1/2024 to 9/30/2025

Evaluation Instructions

This evaluation is intended to provide The Commission and City Manager with an accurate and objective assessment of performance during the evaluation period.

Scoring

- Rate each factor in each section on a scale of **0 to 5**.
- Add the scores together and divide by the number of factors to determine the average score for that section.
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Comments

- Use the comment section to provide specific feedback.
- Include praise for strengths and suggestions for improvement where applicable.

Feedback

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Performance Rating Definitions

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- **Unacceptable (0 points):** Fails to meet minimum expectations even with ongoing assistance and supervision. **Employment with the City is at risk.**

1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	5
Prepares a budget recommendation in an intelligent and accessible format	5
Ensures actions and decisions reflect responsibility for short and long-term planning	5
Monitors and manages fiscal activities within organizational constraints	5
Reviews city equipment and property for future planning and replacement	5
Section Average Score	5

Comments

This year's budget was exceptionally difficult to balance. Olivia and her team delivered a budget with razor thin contingencies. She will need to continue to seek methods of fiscal restraint and opportunities for revenue increase. I have confidence she and her team can execute the task.

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	5
Maintains knowledge of current developments in local government management	5
Demonstrates innovation and creativity	5
Anticipates and analyzes problems to develop effective solutions	5
Considers new ideas proposed by governing body members and/or staff	5
Sets a professional example by acting fairly and impartially	5
Keeps the Leadership Team informed of relevant regulations and constraints	5
Section Average Score	5

Comments

The city manager has a difficult job of managing a large diverse group of employees and many fundamentally different operations within the city. Olivia has illustrated an ability to adapt when necessary and is managing the city, its assets, and employees in an effective manner.

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	5

Develops new programs to address City Government challenges	5
Understands, supports, and enforces laws, policies, and ordinances	5
Makes prompt changes in programs or procedures when necessary	5
Section Average Score	5

Comments

Olivia has tweaked the city staffing structure. She had to be creative and develop a structure that allows for full functionality while also reducing cost. Her approach is also allowing for other city employees to spread their wings and develop additional skills that will pay dividends in the future during times of backfilling or employment advancement opportunities.

4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	5
Works to maintain citizen satisfaction with services	5
Communicates unfavorable information clearly and professionally	5
Section Average Score	5

Comments

Olivia is visible throughout our community. I've heard several citizens mention they've spoken to her about a concerning subject and she has handled it with grace. She delivers the message, even when its not what the citizen wants to hear, in a clear respectful manner.

5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	5
Ensures actions reflect the will of the Commission as a whole	5
Responds well to requests, advice, and constructive criticism	5
Discusses and researches Commission concerns and ideas	5
Reports progress and follows up appropriately	5
Sets meeting agendas that reflect governing body guidance	5
Section Average Score	5

Comments

Olivia frequently sends messages to me on community or city related events and issues. Her communication is impeccable.

6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	5
Respects staff ability and initiative	5
Develops friendly yet professional relationships with staff	5
Gains acceptance for new ideas and organizational changes	5
Encourages teamwork, innovation, and effective problem-solving	5
Interprets and administers City Personnel Policies	5
Section Average Score	5

Comments

I am not aware of any personnel or management concerns with the city staff.

7. Intergovernmental and Community Relations

Performance Factor	Score (0-5)
Maintains a positive image within the community	5
Avoids unnecessary controversy	5
Avoids politics and partisanship	5
Cooperates with neighboring and higher-level government agencies	5
Represents the City effectively when speaking before groups or the press	5
Addresses difficult community issues	5
Defends the city and its reputation when appropriate	5
Section Average Score	5

Comments

Olivia maintains a proper working relationship with the community and other government agencies. She is visible and respected across the community.

8. Professional Characteristics and Skills

Performance Factor	Score (0-5)
Diligent, thorough, and a self-starter	5
Exercises good judgment, enthusiasm, and cooperation	5
Exhibits professional composure, appearance, and attitude	5
Maintains knowledge of developments in local government management	5
Demonstrates innovation and creativity	5
Acts fairly and impartially in public office	5
Section Average Score	5

Comments

Olivia is composed and professional in all situations I've witnessed. She executes with a proper tone and delivery. I wish I could speak in public as well as she does!

Total Score of All Sections _____

Evaluator's Comments

Olivia has flourished as city manager. I hope our community is lucky enough to have her for many more years.

Signatures

Evaluator's Signature: <i>KH Nadasz</i>	Date: <i>9-3-25</i>
City Manager's Signature:	Date:
Human Resources Signature:	Date:



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshew
Title:	City Manager
Department:	Administration
Evaluator:	<i>[Signature]</i>
Evaluation Period:	10/1/2024 to 9/30/2025

Evaluation Instructions

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Scoring

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- Include praise for strengths and suggestions for improvement where applicable.

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1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	5
Prepares a budget recommendation in an intelligent and accessible format	5
Ensures actions and decisions reflect responsibility for short and long-term planning	5
Monitors and manages fiscal activities within organizational constraints	5
Reviews city equipment and property for future planning and replacement	5
Section Average Score	5

Comments

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	5
Maintains knowledge of current developments in local government management	5
Demonstrates innovation and creativity	5
Anticipates and analyzes problems to develop effective solutions	5
Considers new ideas proposed by governing body members and/or staff	5
Sets a professional example by acting fairly and impartially	5
Keeps the Leadership Team informed of relevant regulations and constraints	5
Section Average Score	5

Comments

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	5
Develops new programs to address City Government challenges	5
Understands, supports, and enforces laws, policies, and ordinances	5

Makes prompt changes in programs or procedures when necessary	4
Section Average Score	5

Comments

4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	5
Works to maintain citizen satisfaction with services	5
Communicates unfavorable information clearly and professionally	5
Section Average Score	5

Comments

5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	5
Ensures actions reflect the will of the Commission as a whole	5
Responds well to requests, advice, and constructive criticism	5
Discusses and researches Commission concerns and ideas	5
Reports progress and follows up appropriately	5
Sets meeting agendas that reflect governing body guidance	5
Section Average Score	5

Comments

6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	4
Respects staff ability and initiative	5
Develops friendly yet professional relationships with staff	5
Gains acceptance for new ideas and organizational changes	4
Encourages teamwork, innovation, and effective problem-solving	5
Interprets and administers City Personnel Policies	5
Section Average Score	5

Comments**7. Intergovernmental and Community Relations**

Performance Factor	Score (0-5)
Maintains a positive image within the community	5
Avoids unnecessary controversy	4
Avoids politics and partisanship	4
Cooperates with neighboring and higher-level government agencies	5
Represents the City effectively when speaking before groups or the press	5
Addresses difficult community issues	5
Defends the city and its reputation when appropriate	5
Section Average Score	5

Comments**8. Professional Characteristics and Skills**

Performance Factor	Score (0-5)
--------------------	-------------

Diligent, thorough, and a self-starter	5
Exercises good judgment, enthusiasm, and cooperation	5
Exhibits professional composure, appearance, and attitude	5
Maintains knowledge of developments in local government management	5
Demonstrates innovation and creativity	5
Acts fairly and impartially in public office	5
Section Average Score	5

Comments

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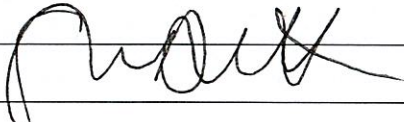
Total Score of All Sections

40

Evaluator's Comments

The city manager Mrs. Mifflin consistently demonstrates exceptional performance across all areas of responsibility. She shows outstanding fiscal management, ensuring that budgets are not only balanced but also strategically aligned with the city's long-term goals. Her management is organizational, skillful, efficient, accountable, and strong internal operations. She excels in program development and follow through, moving initiatives from planning to successful implementation with measurable results.

Signatures

Evaluator's Signature: 	Date:
City Manager's Signature:	Date:
Human Resources Signature:	Date:

Her commitment to citizen relations builds trust, accountability, and responsiveness within the community. Her communication with the commission is clear, timely, and thorough, ensuring that decision makers are fully informed and able to govern effectively. She provides strong supervision that develops staff capacity while maintaining high standards of performance. Finally, her work in intergovernmental relations is exemplary, positioning the city as a leader.

and collaborative partner with other
agencies, organizations, and stakeholders.



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshew
Title:	City Manager
Department:	Administration
Evaluator:	Eary Smith
Evaluation Period:	10/1/2024 to 9/30/2025

Evaluation Instructions

This evaluation is intended to provide The Commission and City Manager with an accurate and objective assessment of performance during the evaluation period.

Scoring

- Rate each factor in each section on a scale of **0 to 5**.
- Add the scores together and divide by the number of factors to determine the average score for that section.
- Round scores: .5 and above round up; below .5 round down.

Comments

- Use the comment section to provide specific feedback.
- Include praise for strengths and suggestions for improvement where applicable.

Feedback

- After totaling scores, the evaluator should provide a summary of the employee's overall performance.
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Signatures

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Performance Rating Definitions

- **Exceptional (5 points):** Consistently and significantly exceeds all reasonable expectations in every area of the rating category.
- **Good (4 points):** Frequently surpasses reasonable expectations in the rating category without deficiencies.
- **Satisfactory (3 points):** Meets reasonable expectations and demonstrates acceptable competence in all aspects of the rating category.
- **Fair (2 points):** Meets only the minimum expectations. Improvement is needed in some areas to fully meet performance standards.
- **Unsatisfactory (1 point):** Occasionally meets minimum expectations but requires frequent assistance and supervision.
- **Unacceptable (0 points):** Fails to meet minimum expectations even with ongoing assistance and supervision. **Employment with the City is at risk.**

1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	5
Prepares a budget recommendation in an intelligent and accessible format	5
Ensures actions and decisions reflect responsibility for short and long-term planning	5
Monitors and manages fiscal activities within organizational constraints	5
Reviews city equipment and property for future planning and replacement	5
Section Average Score	5

Comments

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	5
Maintains knowledge of current developments in local government management	5
Demonstrates innovation and creativity	5
Anticipates and analyzes problems to develop effective solutions	5
Considers new ideas proposed by governing body members and/or staff	5
Sets a professional example by acting fairly and impartially	5
Keeps the Leadership Team informed of relevant regulations and constraints	5
Section Average Score	5

Comments

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	5
Develops new programs to address City Government challenges	5
Understands, supports, and enforces laws, policies, and ordinances	5

Makes prompt changes in programs or procedures when necessary	5
Section Average Score	5

Comments

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4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	5
Works to maintain citizen satisfaction with services	5
Communicates unfavorable information clearly and professionally	5
Section Average Score	5

Comments

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5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	5
Ensures actions reflect the will of the Commission as a whole	5
Responds well to requests, advice, and constructive criticism	5
Discusses and researches Commission concerns and ideas	5
Reports progress and follows up appropriately	5
Sets meeting agendas that reflect governing body guidance	5
Section Average Score	5

Comments

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6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	5
Respects staff ability and initiative	5
Develops friendly yet professional relationships with staff	5
Gains acceptance for new ideas and organizational changes	5
Encourages teamwork, innovation, and effective problem-solving	5
Interprets and administers City Personnel Policies	5
Section Average Score	5

Comments

7. Intergovernmental and Community Relations

Performance Factor	Score (0-5)
Maintains a positive image within the community	5
Avoids unnecessary controversy	5
Avoids politics and partisanship	5
Cooperates with neighboring and higher-level government agencies	5
Represents the City effectively when speaking before groups or the press	5
Addresses difficult community issues	5
Defends the city and its reputation when appropriate	5
Section Average Score	5

Comments

8. Professional Characteristics and Skills

Performance Factor	Score (0-5)
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Diligent, thorough, and a self-starter	5
Exercises good judgment, enthusiasm, and cooperation	5
Exhibits professional composure, appearance, and attitude	5
Maintains knowledge of developments in local government management	5
Demonstrates innovation and creativity	5
Acts fairly and impartially in public office	5
Section Average Score	5

Comments

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Total Score of All Sections40**Evaluator's Comments**

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Signatures

Evaluator's Signature: 	Date: 9-8-25
City Manager's Signature:	Date:
Human Resources Signature:	Date:

City Manager Performance Evaluation
City of Wauchula
Evaluation Period: October 1, 2024 – September 30, 2025
** Staff **

1. Fiscal Management	5	5	5	5
2. Management and Organization	5	5	5	5
3. Program Development and Follow-Through	5	5	5	5
4. Citizen Relations	5	5	5	5
5. Communication with Commission	5	5	5	5
6. Supervision	5	5	5	5
7. Intergovernmental and Community Relations	5	5	5	5
8. Professional Characteristics and Skills	5	5	5	5
Total Scores:	40	40	40	40

Average Total: (160/4) 40



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshew
Title:	City Manager
Department:	Administration
Evaluation Period:	10/1/2024 to 9/30/2025

Evaluation Instructions

This evaluation is intended to provide The Commission and City Manager with an accurate and objective assessment of performance during the evaluation period.

Scoring

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Performance Rating Definitions

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- **Good (4 points):** Frequently surpasses reasonable expectations in the rating category without deficiencies.
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- **Fair (2 points):** Meets only the minimum expectations. Improvement is needed in some areas to fully meet performance standards.
- **Unsatisfactory (1 point):** Occasionally meets minimum expectations but requires frequent assistance and supervision.
- **Unacceptable (0 points):** Fails to meet minimum expectations even with ongoing assistance and supervision. **Employment with the City is at risk.**

1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	5
Prepares a budget recommendation in an intelligent and accessible format	5
Ensures actions and decisions reflect responsibility for short and long-term planning	5
Monitors and manages fiscal activities within organizational constraints	5
Reviews city equipment and property for future planning and replacement	5
Section Average Score	5

Comments

Olivia consistently excels in fiscal leadership and organizational stewardship. She works effectively with the finance director and city staff to prepare balanced budgets that meet Commission directives and presents recommendations in a clear, accessible format. Her decisions reflect strong responsibility, balancing immediate needs with long-term sustainability. She diligently manages fiscal activities within established constraints to ensure accountability and stability. In addition, her proactive review of city equipment and property demonstrates a forward-thinking approach to planning and replacement, underscoring her commitment to responsible and visionary management.

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	5
Maintains knowledge of current developments in local government management	5
Demonstrates innovation and creativity	5
Anticipates and analyzes problems to develop effective solutions	5
Considers new ideas proposed by governing body members and/or staff	5
Sets a professional example by acting fairly and impartially	5
Keeps the Leadership Team informed of relevant regulations and constraints	5
Section Average Score	5

Comments

Olivia demonstrates an effective and inclusive management style that fosters trust and collaboration. She stays well-informed on current developments in local government management and applies that knowledge with innovation and creativity. She sets a professional example by acting with fairness and impartiality, and she keeps the Leadership Team consistently informed ensuring good decisions are being made.

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	5
Develops new programs to address City Government challenges	5
Understands, supports, and enforces laws, policies, and ordinances	5
Makes prompt changes in programs or procedures when necessary	5
Section Average Score	5

Comments

Olivia implements governing body actions in line with Commission intent and develops programs to address emerging city challenges. She understands, supports, and enforces laws and ordinances with consistency. When necessary, she makes prompt changes to programs or procedures, ensuring responsiveness and efficiency.

4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	5
Works to maintain citizen satisfaction with services	5
Communicates unfavorable information clearly and professionally	5
Section Average Score	5

Comments

Olivia listens to and addresses citizen concerns with respect, reinforcing trust and transparency. She works diligently to maintain high levels of citizen satisfaction with city services. She communicates clearly and professionally, ensuring understanding while preserving confidence in city leadership.

5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	5
Ensures actions reflect the will of the Commission as a whole	5
Responds well to requests, advice, and constructive criticism	5
Discusses and researches Commission concerns and ideas	5
Reports progress and follows up appropriately	5
Sets meeting agendas that reflect governing body guidance	5
Section Average Score	5

Comments

Olivia keeps the Commission well-informed of city operations with candid, accurate and timely information. She ensures actions reflect the will of the Commission as a whole, while responding thoughtfully to requests, advice, and constructive feedback. I have observed that she demonstrates accountability and strong support for Commission priorities even when they are not her own.

6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	5
Respects staff ability and initiative	5
Develops friendly yet professional relationships with staff	5
Gains acceptance for new ideas and organizational changes	5
Encourages teamwork, innovation, and effective problem-solving	5
Interprets and administers City Personnel Policies	5
Section Average Score	5

Comments

Olivia supervises staff and department directors effectively, showing respect for their abilities and initiative. She builds professional yet approachable relationships, gaining support for new ideas and organizational changes. By encouraging teamwork, innovation, and problem-solving, while fairly administering City Personnel Policies, she fosters a positive and productive work environment.

7. Intergovernmental and Community Relations

Performance Factor	Score (0-5)
Maintains a positive image within the community	5
Avoids unnecessary controversy	5
Avoids politics and partisanship	5
Cooperates with neighboring and higher-level government agencies	5
Represents the City effectively when speaking before groups or the press	5
Addresses difficult community issues	5
Defends the city and its reputation when appropriate	5
Section Average Score	5

Comments

Olivia maintains a positive image in the community by engaging respectfully and avoiding unnecessary controversy or partisanship. She cooperates effectively with neighboring and higher-level government agencies and represents the City with professionalism. When addressing difficult issues, she communicates with clarity and fairness while defending the City's reputation when appropriate.

8. Professional Characteristics and Skills

Performance Factor	Score (0-5)
Diligent, thorough, and a self-starter	5
Exercises good judgment, enthusiasm, and cooperation	5
Exhibits professional composure, appearance, and attitude	5
Maintains knowledge of developments in local government management	5
Demonstrates innovation and creativity	5
Acts fairly and impartially in public office	5
Section Average Score	5

Comments

I have clearly observed that Olivia is diligent, thorough, and a self-starter who exercises sound judgment with enthusiasm and cooperation. She consistently maintains professional composure, appearance, and attitude, setting a high standard for public service. She stays current on local government developments, demonstrating creativity, and acting fairly and impartially, she embodies the professionalism and integrity expected of her role.

Total Score of All Sections _____ 40

Evaluator's Comments

In my opinion, Olivia has demonstrated exceptional performance across all areas of her role, consistently upholding the highest standards of leadership, professionalism, and accountability especially when comparing her performance to that of others I have worked with. I have observed that she excels in fiscal management, program implementation, and innovation, while fostering collaboration and trust among staff, the Commission, and the community. Her ability to anticipate challenges, develop effective solutions, and communicate with clarity ensures that city operations remain efficient, transparent, and aligned with Commission priorities. Olivia's professionalism, impartiality, and commitment to continuous improvement reinforce her positive impact on both the organization and the community. She is approachable, open to innovations, and listens to her subordinates without jumping to conclusions and making knee jerk decisions. Overall, I contend that she is a highly effective leader whose contributions significantly strengthen the City's ability to serve its residents with excellence.

Signatures

City Manager's Signature:	Date:
Human Resources Signature:	Date:



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshe
Title:	City Manager
Department:	Administration
Evaluation Period:	10/1/2024 to 9/30/2025

Evaluation Instructions

This evaluation is intended to provide The Commission and City Manager with an accurate and objective assessment of performance during the evaluation period.

Scoring

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Comments

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- Include praise for strengths and suggestions for improvement where applicable.

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- **Unsatisfactory (1 point):** Occasionally meets minimum expectations but requires frequent assistance and supervision.
- **Unacceptable (0 points):** Fails to meet minimum expectations even with ongoing assistance and supervision. **Employment with the City is at risk.**

1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	5
Prepares a budget recommendation in an intelligent and accessible format	5
Ensures actions and decisions reflect responsibility for short and long-term planning	5
Monitors and manages fiscal activities within organizational constraints	5
Reviews city equipment and property for future planning and replacement	5
Section Average Score	5

Comments

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	5
Maintains knowledge of current developments in local government management	5
Demonstrates innovation and creativity	5
Anticipates and analyzes problems to develop effective solutions	5
Considers new ideas proposed by governing body members and/or staff	5
Sets a professional example by acting fairly and impartially	5
Keeps the Leadership Team informed of relevant regulations and constraints	5
Section Average Score	5

Comments

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	5
Develops new programs to address City Government challenges	5

Understands, supports, and enforces laws, policies, and ordinances	5
Makes prompt changes in programs or procedures when necessary	5
Section Average Score	5

Comments

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4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	5
Works to maintain citizen satisfaction with services	5
Communicates unfavorable information clearly and professionally	5
Section Average Score	5

Comments

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5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	5
Ensures actions reflect the will of the Commission as a whole	5
Responds well to requests, advice, and constructive criticism	5
Discusses and researches Commission concerns and ideas	5
Reports progress and follows up appropriately	5
Sets meeting agendas that reflect governing body guidance	5
Section Average Score	5

Comments

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6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	5
Respects staff ability and initiative	5
Develops friendly yet professional relationships with staff	5
Gains acceptance for new ideas and organizational changes	5
Encourages teamwork, innovation, and effective problem-solving	5
Interprets and administers City Personnel Policies	5
Section Average Score	5

Comments

7. Intergovernmental and Community Relations

Performance Factor	Score (0-5)
Maintains a positive image within the community	5
Avoids unnecessary controversy	5
Avoids politics and partisanship	5
Cooperates with neighboring and higher-level government agencies	5
Represents the City effectively when speaking before groups or the press	5
Addresses difficult community issues	5
Defends the city and its reputation when appropriate	5
Section Average Score	5

Comments

8. Professional Characteristics and Skills

Performance Factor	Score (0-5)
Diligent, thorough, and a self-starter	5
Exercises good judgment, enthusiasm, and cooperation	5
Exhibits professional composure, appearance, and attitude	5
Maintains knowledge of developments in local government management	5
Demonstrates innovation and creativity	5
Acts fairly and impartially in public office	5
Section Average Score	5

Comments

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Total Score of All Sections 40

Evaluator's Comments

Olivia

Signatures

City Manager's Signature:	Date:
Human Resources Signature:	Date:



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshew
Title:	City Manager
Department:	Administration
Evaluation Period:	10/1/2024 to 9/30/2025

Evaluation Instructions

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Scoring

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1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	5
Prepares a budget recommendation in an intelligent and accessible format	5
Ensures actions and decisions reflect responsibility for short and long-term planning	5
Monitors and manages fiscal activities within organizational constraints	5
Reviews city equipment and property for future planning and replacement	5
Section Average Score	5

Comments

Olivia is very active in the budget planning process. She has reasonable expectations for current and future budget considerations.

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	5
Maintains knowledge of current developments in local government management	5
Demonstrates innovation and creativity	5
Anticipates and analyzes problems to develop effective solutions	5
Considers new ideas proposed by governing body members and/or staff	5
Sets a professional example by acting fairly and impartially	5
Keeps the Leadership Team informed of relevant regulations and constraints	5
Section Average Score	5

Comments

Olivia stays aware of happenings within departments. She gives supervisors the freedom to handle situations that arise and will provide guidance when needed. Olivia is well respected by staff and is always mindful of the example she is setting to those around her.

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	5
Develops new programs to address City Government challenges	5

Understands, supports, and enforces laws, policies, and ordinances	5
Makes prompt changes in programs or procedures when necessary	5
Section Average Score	5

Comments

Something I really respect Olivia for is that she holds the City to the same standards we set for citizens. She ensures we follow our own ordinances and codes the same way we enforce them in the community and, when something needs to be reviewed for possible changes, she doesn't shy away from putting in the time to do that.

4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	5
Works to maintain citizen satisfaction with services	5
Communicates unfavorable information clearly and professionally	5
Section Average Score	5

Comments

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5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	5
Ensures actions reflect the will of the Commission as a whole	5
Responds well to requests, advice, and constructive criticism	5
Discusses and researches Commission concerns and ideas	5
Reports progress and follows up appropriately	5
Sets meeting agendas that reflect governing body guidance	5
Section Average Score	5

Comments

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6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	5
Respects staff ability and initiative	5
Develops friendly yet professional relationships with staff	5
Gains acceptance for new ideas and organizational changes	5
Encourages teamwork, innovation, and effective problem-solving	5
Interprets and administers City Personnel Policies	5
Section Average Score	5

Comments

Olivia has a supervision style that accepted by staff. She provides guidance, adhering to the City's PRR. She offers positive feedback and fosters professional relationships between peers.

7. Intergovernmental and Community Relations

Performance Factor	Score (0-5)
Maintains a positive image within the community	5
Avoids unnecessary controversy	5
Avoids politics and partisanship	5
Cooperates with neighboring and higher-level government agencies	5
Represents the City effectively when speaking before groups or the press	5
Addresses difficult community issues	5
Defends the city and its reputation when appropriate	5
Section Average Score	5

Comments

Olivia is extremely active in the community and strives to maintain a positive image. She works to build and maintain effective partnerships both locally and at a higher level.

8. Professional Characteristics and Skills

Performance Factor	Score (0-5)
Diligent, thorough, and a self-starter	5
Exercises good judgment, enthusiasm, and cooperation	5
Exhibits professional composure, appearance, and attitude	5
Maintains knowledge of developments in local government management	5
Demonstrates innovation and creativity	5
Acts fairly and impartially in public office	5
Section Average Score	5

Comments

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Total Score of All Sections 40**Evaluator's Comments**

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Signatures

City Manager's Signature:	Date:
Human Resources Signature:	Date:



CITY MANAGER PERFORMANCE EVALUATION

Personnel Information

Name:	Olivia Minshew
Title:	City Manager
Department:	Administration
Evaluation Period:	10/1/2024 to 9/30/2025

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1. Fiscal Management

Performance Factor	Score (0-5)
Prepares a realistic and balanced budget to provide services at a level directed by Commission	5
Prepares a budget recommendation in an intelligent and accessible format	5
Ensures actions and decisions reflect responsibility for short and long-term planning	5
Monitors and manages fiscal activities within organizational constraints	5
Reviews city equipment and property for future planning and replacement	5
Section Average Score	5

Comments

2. Management and Organization

Performance Factor	Score (0-5)
Demonstrates an effective management style	4
Maintains knowledge of current developments in local government management	5
Demonstrates innovation and creativity	4
Anticipates and analyzes problems to develop effective solutions	5
Considers new ideas proposed by governing body members and/or staff	5
Sets a professional example by acting fairly and impartially	5
Keeps the Leadership Team informed of relevant regulations and constraints	4
Section Average Score	5

Comments

3. Program Development and Follow-Through

Performance Factor	Score (0-5)
Implements governing body actions in accordance with Commission intent	5
Develops new programs to address City Government challenges	5

Understands, supports, and enforces laws, policies, and ordinances	5
Makes prompt changes in programs or procedures when necessary	5
Section Average Score	5

Comments

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4. Citizen Relations

Performance Factor	Score (0-5)
Listens to and addresses citizen concerns with respect	5
Works to maintain citizen satisfaction with services	5
Communicates unfavorable information clearly and professionally	4
Section Average Score	5

Comments

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5. Communication with Commission

Performance Factor	Score (0-5)
Keeps Commission informed of city operations with accurate information	5
Ensures actions reflect the will of the Commission as a whole	5
Responds well to requests, advice, and constructive criticism	5
Discusses and researches Commission concerns and ideas	5
Reports progress and follows up appropriately	5
Sets meeting agendas that reflect governing body guidance	5
Section Average Score	5

Comments

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6. Supervision

Performance Factor	Score (0-5)
Supervises staff and department directors effectively	4
Respects staff ability and initiative	5
Develops friendly yet professional relationships with staff	5
Gains acceptance for new ideas and organizational changes	5
Encourages teamwork, innovation, and effective problem-solving	4
Interprets and administers City Personnel Policies	5
Section Average Score	5

Comments

7. Intergovernmental and Community Relations

Performance Factor	Score (0-5)
Maintains a positive image within the community	5
Avoids unnecessary controversy	4
Avoids politics and partisanship	4
Cooperates with neighboring and higher-level government agencies	5
Represents the City effectively when speaking before groups or the press	5
Addresses difficult community issues	4
Defends the city and its reputation when appropriate	5
Section Average Score	5

Comments

8. Professional Characteristics and Skills

Performance Factor	Score (0-5)
Diligent, thorough, and a self-starter	5
Exercises good judgment, enthusiasm, and cooperation	5
Exhibits professional composure, appearance, and attitude	5
Maintains knowledge of developments in local government management	5
Demonstrates innovation and creativity	5
Acts fairly and impartially in public office	5
Section Average Score	5

Per
5/5/25

Comments**Total Score of All Sections**

40

Evaluator's Comments**Signatures**

City Manager's Signature:	Date:
Human Resources Signature:	Date: