

CITY OF WESTLAKE



AGENDA

City Council Regular Meeting

Tuesday, July 02, 2024, at 6:00 PM

The Lodge at Westlake Adventure Park
5490 Kingfisher Blvd.
Westlake, Florida 33470

Live Broadcasting:

<https://cityofwestlake.my.webex.com>

Meeting ID: 2632 888 9851 | Password: hello

or

United States Toll: +1-650-479-3208

CITY COUNCIL:

JohnPaul O'Connor, Mayor

Greg Langowski, Vice Mayor

Gary Werner, Council Member – Seat 1

Julian Martinez, Council Member – Seat 2

Charlotte Leonard, Council Member – Seat 3

CITY STAFF:

Ken Cassel, City Manager

Zoie P. Burgess, CMC, City Clerk

Donald J. Doody, Esq., City Attorney

Nilsa Zacarias, AICP, Planning and Zoning Director

Suzanne Dombrowski, P.E., ENV SP, City Engineer

[TENTATIVE: SUBJECT TO REVISION]

CALL TO ORDER

ROLL CALL

PLEDGE OF ALLEGIANCE

ADDITIONS, DELETIONS OR MODIFICATIONS, AND APPROVAL OF AGENDA

PUBLIC COMMENTS AND REQUESTS

This section of the agenda allows for comments from the public to speak. Each speaker will be given a total of three (3) minutes to comment. A public comment card should be completed and returned to the City Clerk. When you are called to speak, please go to the podium, and prior to addressing Council, state your name and address for the record. All public comments will be noted and may receive a response if necessary. Any follow-up will be handled by staff later.

PRESENTATIONS/PROCLAMATIONS

CONSENT AGENDA

This section of the agenda consists of routine or administrative items that require final approval by the City Council and may be approved in its entirety by a single motion. There will be no discussion of these items unless a Council Member requests such, in which event, the item will be removed from the Consent Agenda and considered on a future agenda.

- [A.](#) Minutes_City Council Budget Workshop - 05.21.2024 DRAFT
- [B.](#) Minutes_City of Westlake and Seminole Improvement District Joint Workshop - 05.21.2024 DRAFT
- [C.](#) Minutes_City Council Regular Meeting - 06.04.2024 DRAFT
- [D.](#) Monthly Financial Report - April 2024
- [E.](#) Monthly Financial Report - May 2024

PUBLIC HEARING

- [A.](#) RESOLUTION 2024-12 - Proposed Millage Rate for the Fiscal Year 2024-2025 Ad Valorem Tax and a Date, Time and Place for the First Public Budget Hearing

Submitted By: City Clerk's Office

RESOLUTION 2024-12

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, ADOPTING A PROPOSED MILLAGE RATE FOR THE CITY'S GENERAL OPERATING FUND FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024 AND ENDING SEPTEMBER 30, 2025; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

- B.** RESOLUTION 2024-13 - Levying the Annual Special Assessment for Residential Solid Waste Services for Fiscal Year 2024-25

Submitted By: Administration

RESOLUTION NO. 2024-13

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, RELATING TO THE PROVISION OF RESIDENTIAL SOLID WASTE SERVICES IN THE CITY OF WESTLAKE, FLORIDA; PROVIDING FOR PURPOSE AND DEFINITIONS; PROVIDING FOR LEGISLATIVE DETERMINATIONS; ESTABLISHING THE ESTIMATED RATE FOR THE RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENT FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024; DIRECTING THE PREPARATION OF A RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENT ROLL; AUTHORIZING A PUBLIC HEARING AND DIRECTING THE PROVISION OF NOTICE THEREOF; AND PROVIDING AN EFFECTIVE DATE.

- C.** Approving and Authorizing the Mayor or Vice Mayor to Execute the Sixth Addendum to Law Enforcement Agreement

Submitted By: Administration

RESOLUTION NO. 2024-14

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, APPROVING AND AUTHORIZING THE MAYOR OR VICE MAYOR TO EXECUTE THE SIXTH ADDENDUM TO THE LAW ENFORCEMENT SERVICE AGREEMENT BETWEEN THE CITY OF WESTLAKE AND THE SHERIFF OF PALM BEACH COUNTY, FLORIDA; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

- D.** **FIRST READING** - ORDINANCE 2024-02 — Establishing Residency Prohibitions and Exceptions for Sexual Offenders and Sexual Predators

Submitted By: City Attorney's Office

ORDINANCE NO. 2024-02

AN ORDINANCE OF THE CITY COUNCIL FOR THE CITY OF WESTLAKE, FLORIDA, ESTABLISHING CERTAIN RESIDENCY PROHIBITIONS AND EXCEPTIONS FOR SEXUAL OFFENDERS AND SEXUAL PREDATORS; PROVIDING FOR FINDINGS AND INTENT; PROVIDING FOR DEFINITIONS; PROVIDING FOR PENALTIES; PROVIDING FOR CODIFICATION, CONFLICTS, SEVERABILITY, AND AN EFFECTIVE DATE.

NEW BUSINESS

- A.** Update to City of Westlake's Housing Assistance Guidelines

Submitted By: Administration

RESOLUTION 2024-15

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, APPROVING AND ADOPTING THE CITY OF WESTLAKE'S REVISED HOUSING ASSISTANCE PURCHASE PROGRAM YEARLY GUIDELINES; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

CITY COUNCIL COMMENTS

- A. Councilwoman Charlotte Leonard
- B. Councilman Julian Martinez
- C. Councilman Gary Werner
- D. Vice Mayor Greg Langowski
- E. Mayor JohnPaul O'Connor

REPORT - STAFF

REPORT - CITY ATTORNEY

REPORT - CITY MANAGER

PUBLIC COMMENTS AND REQUESTS

This section of the agenda allows for comments from the public to speak. Each speaker will be given a total of three (3) minutes to comment. A public comment card should be completed and returned to the City Clerk. When you are called to speak, please go to the podium, and prior to addressing Council, state your name and address for the record. All public comments will be noted and may receive a response if necessary. Any follow-up will be handled by staff later.

ADJOURNMENT

Next Meeting (Subject to Change or be Cancelled): **August 6, 2024**

NOTICE: If a person, firm or corporation decides to appeal any decision made by the City Council with respect to any matter considered at this meeting, you will need a record of the proceedings, and you may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. (The above notice is required by State Law. Anyone desiring a verbatim transcript shall have the responsibility, at his own cost, to arrange for the transcript). The City of Westlake does not prepare or provide such verbatim record.

In accordance with the Americans with Disabilities Act, persons who need an accommodation in order to attend or participate in this meeting should contact the City Clerk at (561) 530-5880 at least three (3) business days prior to the meeting in order to request such assistance.

AGENDA POSTED: Thursday, June 27, 2024

File Attachments for Item:

A. Minutes_City Council Budget Workshop - 05.21.2024 DRAFT

CITY OF WESTLAKE



MINUTES

City Council Budget Workshop

Tuesday, May 21, 2024 at 6:00 PM

The Lodge at Westlake Adventure Park
5490 Kingfisher Blvd.
Westlake, Florida 33470

CITY COUNCIL:

JohnPaul O'Connor, Mayor
Greg Langowski, Vice Mayor
Gary Werner, Council Member – Seat 1
Julian Martinez, Council Member – Seat 2
Charlotte Leonard, Council Member – Seat 3

CITY STAFF:

Ken Cassel, City Manager
Zoie P. Burgess, CMC, City Clerk
Donald J. Doody, Esq., City Attorney
Nilsa Zacarias, AICP, Planning and Zoning Director
Suzanne Dombrowski, PE, ENV SP, City Engineer

A Budget Workshop of the City Council of the City of Westlake was held on Tuesday, May 21, 2024, at 6:00 PM., at The Lodge at Westlake Adventure Park, 5490 Kingfisher Blvd. Members of the public also live streamed the meeting through electronic means and accessed as follows:

1. Webex Meeting: <https://cityofwestlake.my.webex.com/>

Meeting ID: 2633 293 8242

Password: hello

2. By Phone:

United States Toll: +1-650-479-3208

Meeting ID: 2633 293 8242

CALL TO ORDER

Mayor O'Connor called the Budget Workshop of the City Council of the City of Westlake of Tuesday, May 21, 2024, to order at 6:03 PM.

ROLL CALL

Present and constituting a quorum:

Councilwoman Charlotte Leonard

Councilman Julian Martinez

Councilman Gary Werner

Mayor JohnPaul O'Connor

Also present:

Kenneth Cassel, City Manager

Sean M. Swartz Esq., City Attorney

Zoie Burgess, City Clerk

Osniel Leon, Assistant City Planner

Vice Mayor Greg Langowski was not physically present but participated virtually.

PLEDGE OF ALLEGIANCE

Mayor O'Connor led the Pledge of Allegiance.

WORKSHOP AGENDA

- A. Presentation of Proposed Budget and Discussion and Input from the Council

Presented By: Kenneth Cassel, City Manager

Mr. Cassel introduced the Fiscal Year 2024-2025 Budget, noting it is very preliminary based upon assumed values and revenues with a millage rate consistent with the current rate of 5.0 mills.

Mr. Cassel also noted that the budget has been adjusted with various items being modified or being removed from the Enterprise Fund to the General Fund.

Mr. Cassel identified the budget calendar as included in the budget document. He further explained that at the Second Public Hearing, where the final millage rate is set there must be a full quorum present.

Mr. Cassel continued in the budget overview, highlighting the enclosed budget summary with a total funding and expenditures of approximately \$10,300,000, noting that the expenditures reflect the revenue to ensure a balanced budget. Mr. Cassel noted that this is based on current information, but final numbers should be in for tax revenue June 1.

Council discussion regarding expected tax revenue.

Mr. Cassel continued, identifying the estimated personnel, operating and capital expenditures, as well as what is estimated for contingency and reserves. He explained that he will be asking Council to assign reserves for capital improvements, such as for the park.

Council discussion regarding reserves and contingency.

Further Council discussion regarding additional revenue as it relates to taxes and the need to collect gas taxes.

Mr. Cassel explained the gas tax and the efforts that are being made and continue to be made.

Council discussion on the components on the line item for Municipal Revenue Sharing and a request to clarify this line item.

Council consensus to discuss budget, page by page and line by line.

Additional discussion on revenue detail, as it relates to Licenses, permits and franchise fees.

Council discussion regarding the City Council's budget various requests to be added, including a 20% increase of travel., LED Stop Signs and a City of Westlake App.

Continued Council discussion regarding the general fund as it relates to departments, community services and events.

Council continued discussion regarding Special Revenue Fund.

Council identified the Second and Final Budget Hearing date to be set for September 11, 2024

PUBLIC COMMENTS

Public Comment - Mary Ellen Manning – 15780 Cresswind Place – Ms. Manning asked what company Steven Fowler works for, the location of reserves monies, HAPPY monies and other monies used by the City. Ms. Manning suggested when dealing with large amounts of money staff should look into accounts that have better returns and are not risky to make the money work for the city such as bonds and lending the money out.

ADJOURNMENT

There being no further business, Mayor O'Connor adjourned the meeting at 8:01 PM.

Zoie P. Burgess, City Clerk

JohnPaul O'Connor, Mayor

File Attachments for Item:

B. Minutes_City of Westlake and Seminole Improvement District Joint Workshop - 05.21.2024
DRAFT

CITY OF WESTLAKE



MINUTES

**City of Westlake and Seminole
Improvement District Joint Workshop**
Tuesday, May 21, 2024 at 4:00 PM

The Lodge at Westlake Adventure Park
5490 Kingfisher Blvd.
Westlake, Florida 33470

CITY COUNCIL:

JohnPaul O'Connor, Mayor
Greg Langowski, Vice Mayor
Gary Werner, Council Member – Seat 1
Julian Martinez, Council Member – Seat 2
Charlotte Leonard, Council Member – Seat 3

CITY STAFF:

Ken Cassel, City Manager
Zoie P. Burgess, CMC, City Clerk
Donald J. Doody, Esq., City Attorney
Nilsa Zacarias, AICP, Planning and Zoning Director
Suzanne Dombrowski, PE, ENV SP, City Engineer

A joint workshop of the City of Westlake and the Seminole Improvement District was held on Tuesday, May 21, 2024, at 4:00 PM., at The Lodge at Westlake Adventure Park, 5490 Kingfisher Blvd. Members of the public also live streamed the meeting through electronic means and accessed as follows:

1. Webex Meeting: <https://cityofwestlake.my.webex.com/>

Meeting ID: 2633 293 8242

Password: hello

2. By Phone:

United States Toll: +1-640-479-3208

Meeting ID: 2633 293 8242

CALL TO ORDER

Mayor O'Connor called the City of Westlake and Seminole Improvement District Joint meeting of Tuesday, May 21, 2024, to order at 4:08 PM.

ROLL CALL

Present and constituting a quorum:

City of Westlake

Councilman Gary Werner

Councilman Julian Martinez

Councilwoman Charlotte Leonard (Arrived at 4:45 PM)

Mayor JohnPaul O'Connor

Seminole Improvement District

Supervisor Gevers (Absent)

Supervisor Beard

Supervisor Massey

Also present for City of Westlake:

Kenneth Cassel, City Manager

Sean M. Swartz, Esq., City Attorney

Zoie Burgess, City Clerk

Also present for Seminole Improvement District:

Seth Behn, AICP

Vice Mayor Greg Langowski was not physically present but participated virtually.

PLEDGE OF ALLEGIANCE

Mayor O'Connor led the Pledge of Allegiance.

WORKSHOP AGENDA

- A. Presentation:** Seminole Improvement District (SID) and the City of Westlake's Interlocal Agreement, the Working Relationship and the Areas of Responsibility and Jurisdiction

Presented By: Seth Behn, AICP

Mr. Behn presented an overview of the relationship between the City of Westlake and the Seminole Improvement District:

- History of the Seminole Improvement District
- Roles and responsibilities
- Water Control Plan
- Funding of Seminole Improvement District Projects
- Dedicated fishing area
- Roads

- B. Seminole Improvement District (SID) - Park Update and Future Development and Current and Future Development**

Mr. Wheeler discussed and presented an overview of the plans for the incoming park:

- Heliport/Vertiport
- Park Lighting
- Electrical Power
- Park Hours
- Event Parking

Council discussed the option to add a vertiport to allow Electric Vehicle Takeoff and Landing (EVTOL). Mr. Cassel stated funding for phase 1 would include food truck areas, bathrooms, and lighting to hopefully be completed by July of the following year.

DISCUSSION

- A. City of Westlake and Seminole Improvement District Boards Q & A and General Discussion**

Council asked for a status of the Indian Trails lawsuit. Mr. Behn stated he was not part of the litigation team and would get a status update and forward to the city.

Council also discussed and asked for clarification on the total number of amenities.

Additional discussion on the multimodal path.

PUBLIC COMMENTS

Public Comment – Alicia Torres – 5847 Whippoorwill Circle – Ms. Torres inquired if a concession stand would be built into the park and if City Hall would still be located inside the park. Ms. Torres also inquired about the walking path.

Public Comment - Suzanne Dombrowski – City Engineer, Chen Moore and Associates – The Transportation Planning Agency (TPA) is holding a walk safety audit on Thursday May 23rd starting at City Hall at 7:00 AM.

Public Comment - Lisa Gonzalez - 5680 Opal Drive – Ms. Gonzalez asked what the building behind Publix is and if any big box stores and restaurants are coming to the City.

ADJOURNMENT

There being no further business, Mayor O'Connor adjourned the meeting at 5:32 PM.

Zoie P. Burgess, City Clerk

JohnPaul O'Connor, Mayor

File Attachments for Item:

C. Minutes_City Council Regular Meeting - 06.04.2024 DRAFT

CITY OF WESTLAKE



MINUTES

City Council Regular Meeting
Tuesday, June 04, 2024 at 6:00 PM

The Lodge at Westlake Adventure Park
5490 Kingfisher Blvd.
Westlake, Florida 33470

CITY COUNCIL:

JohnPaul O'Connor, Mayor
Greg Langowski, Vice Mayor
Gary Werner, Council Member – Seat 1
Julian Martinez, Council Member – Seat 2
Charlotte Leonard, Council Member – Seat 3

CITY STAFF:

Ken Cassel, City Manager
Zoie P. Burgess, CMC, City Clerk
Donald J. Doody, Esq., City Attorney
Nilsa Zacarias, AICP, Planning and Zoning Director
Suzanne Dombrowski, PE, ENV SP, City Engineer

A regular meeting of the City Council of the City of Westlake was held on Tuesday, June 4, 2024, at 6:00 PM., at The Lodge at Westlake Adventure Park, 5490 Kingfisher Blvd. Members of the public also live streamed the meeting through electronic means and accessed as follows:

1. Webex Meeting: <https://cityofwestlake.my.webex.com/>

Meeting ID: 2632 888 9851

Password: hello

2. By Phone:

United States Toll: +1-650-479-3208

Meeting ID: 2632 888 9851

CALL TO ORDER

Mayor O'Connor called the City of Westlake Regular City Council meeting of Tuesday, June 4, 2024, to order at 6:00 PM.

ROLL CALL

Present and constituting a quorum:

Councilman Gary Werner
Councilman Julian Martinez
Councilwoman Charlotte Leonard
Vice Mayor Greg Langowski
Mayor JohnPaul O'Connor

Also present:

Kenneth Cassel, City Manager
Donald J. Doody, Esq., City Attorney
Zoie Burgess, City Clerk
Osniel Leon, Assistant City Planner

PLEDGE OF ALLEGIANCE

Mayor O'Connor led the Pledge of Allegiance.

ADDITIONS, DELETIONS OR MODIFICATIONS, AND APPROVAL OF AGENDA

Mr. Cassel requested the April Financial Report be removed from the consent and brought back in July.

Mayor O'Connor called for a motion to remove the April Financial Report from the consent agenda to allow modifications.

Motion by Councilwoman Leonard to remove the April Financial Report from the consent agenda, seconded by Vice Mayor Langowski.

UPON ROLL CALL:

Councilman Werner	YES
Councilman Martinez	YES
Councilwoman Leonard	YES
Vice Mayor Langowski	YES
Mayor O'Connor	YES

With all in favor, motion carried without dissent (5-0).

Mayor O'Connor called for a motion to approve the modified agenda.

Motion by Vice Mayor Langowski to approve the agenda as amended, seconded by Councilman Martinez.

UPON ROLL CALL:

Councilman Martinez	YES
Councilwoman Leonard	YES
Vice Mayor Langowski	YES
Mayor O'Connor	YES
Councilman Werner	YES

With all in favor, motion carried without dissent (5-0).

PUBLIC COMMENTS AND REQUESTS

Public Comment – Jay Estis – Confidential Address – Mr. Estis discussed his concerns regarding iguanas as an invasive species in the neighborhood.

PRESENTATIONS/PROCLAMATIONS

A. Palm Beach County District 6 Update

Presented By: Commissioner Sara Baxter - District 6

Ms. Baxter introduced herself and her staff who will present updates on roads and legislative updates.

Mr. Ed Chase, Director of Intergovernmental Affairs and Community Engagement for Palm Beach County gave an update on the legislative session that recently ended. Mr. Chase discussed state budgets for the various county programs, revenue received, funded programs, and appropriations received.

Director of Legislative Affairs for Palm Beach County, Ms. Kasey Denny gave updates on policies, recently passed bills, and discussed the different sales tax holidays. Ms. Denny also discussed impact fees, mobility fees, and time frames allowed for permitting in the county.

Ms. Baxter further discussed funding for roads.

B. Road Development Update - 60th Street

Presented By: David Ricks, P.E., Palm Beach County Engineer

Mr. Ricks presented an overview of the three segments of 60th Street North project:

- Seminole Pratt Whitney Rd. to 140th Ave. North
- 140th Ave. North to 120th Ave. North

- 120th Ave. North to SR-7

Mr. Ricks also discussed the widening of Seminole Pratt Whitney Road and gave an update on the Northlake Blvd. project.

Council discussed item further with Mr. Ricks regarding timeframe of projects, speed limits, multi-use paths, width of the roads, berms, and interlocal agreements.

C. Proclamation 2024-12 – Juneteenth

Mayor O’Connor identified Proclamations and read each into record.

CONSENT AGENDA

A. Minutes_City Council Regular Meeting - 05.07.2024 DRAFT

Mayor O’Connor identified the consent agenda items and called for a motion to approve.

Motion by Vice Mayor Langowski to approve the consent agenda, seconded by Councilman Werner.

UPON ROLL CALL:

Councilwoman Leonard	YES
Vice Mayor Langowski	YES
Mayor O’Connor	YES
Councilman Werner	YES
Councilman Martinez	YES

With all in favor, motion carried without dissent (5-0).

B. Monthly Financial Report – April

Removed – Agenda Modified

PUBLIC HEARING - QUASI JUDICIAL

A. **SPR-2024-01:** The applicant is requesting Site Plan approval of a 4.54 acre site for a proposed Retail Sales & Services use known as, “Tractor Supply” located in Parcel F2 within the Westlake Landings development. The application includes a 23,976 sq. ft. main building, a 20,055 sq. ft. fenced outdoor display area including a 1,300 sq.ft. storage shed. The applicant is also requesting a Waiver from Chapter 3, Section 3 (1)(b)(i)(b) to increase the allowed fence height around the outdoor display area from six (6) feet to eight 8 feet at this location.

Submitted By: Planning and Zoning

Mayor O’Connor introduced item and asked for Mr. Doody to swear in witnesses. Mr. Doody swore in all witnesses who would be providing testimony.

Mr. Doody asked for members to disclose any ex-parte communications if any, Mayor O’Connor stated he was not sure if he had any but has communicated with the landowner regarding the item

Staff presentation by Mr. Leon, on behalf of the City.

Council discussion regarding golf cart parking, electrical vehicle parking, size and specifications regarding trailers stored outside of the business, and conditions recommended by staff.

Applicant presentation, presented by Donaldson Hearing of Cotleur & Hearing on behalf of Minto PBLH, LLC. Mr. Hearing, included in presentation an east elevation waiver to increase the height of the fence proposed around the outdoor display area to 8 feet.

Mr. Doody requested Mr. Hearing to identify the applicant. Mr. Hearing confirmed the applicant to be Hix Snedeker who is under a purchase contract with Minto, the landowner.

Council discussed item further regarding trailer size, storage and security of merchandise and conditions.

Ms. Jennifer Nylander, representative for the developer Hix Snedeker discussed the trailers that will be sold at Tractor Supply.

Mayor O'Connor opened for council comment.

Council discussed if the applicant would consider building the shed of concrete material instead of metal, items sold at the business, height of the shed, and the location of the fenced area located behind 7-Eleven.

Mr. Doody inquired if application is to be considered, for it be done so in two steps: initial application and site plan and second motion the waivers.

Mr. Doody asked the applicant if they agree to the restrictions on the size of the trailers, not to exceed four wheels, three-point hitches and they will not exceed 20 feet in length, Mr. Hearing agreed.

Council discussed if applicant would consider adding tubular steel fencing instead of chain-link fencing around the outdoor enclosed area. Mr. Hearing stated they would prefer not to change the fencing of the area.

Mayor O'Connor opened for public comment, there being none, Council discussion followed.

Mayor O'Connor called for a motion.

Motion by Councilman Werner to approve Tractor Supply with a few amendments to the site plan, that the outside display area be enclosed with an eight-foot high elelaster rod iron or tubular steel fence instead of chain-link and that the medal shed be replace with a concrete structure.

Motion not considered as there was no second.

Mr. Doody asked for council to open for public hearing.

Public Comment - Jennifer Nylander – 805 Trione St., Daphne, AL 36526 – Ms. Nylander confirmed they are following the code as it exists related to fencing, and it is being enhanced with black mesh as well as landscaping.

Motion by Vice Mayor Langowski to approve SPR 2024-01 with the conditions identified in the staff report as well as the additional condition relative to the trailers, seconded by Councilwoman Leonard.

Mr. Osniel listed the conditions recommended by staff as follows:

1. Applicant shall contribute one percent (1%) of the building's construction cost of Parcel F2 to the City of Westlake Art Acquisition Fund prior to building permit issuance.
2. Outdoor merchandise display is prohibited outside of the designated display areas.
3. Outdoor display areas shall be kept orderly and clean at all times.
4. The storage of merchandise outside the fenced outdoor merchandise display is prohibited.
5. The obstruction of parking spaces or drive isles is prohibited. All loading/unloading of merchandise shall only be permitted in the designated loading areas.

- 6. Display area adjacent to Persimmon Blvd. West shall be limited to Trailer display only.
- 7. Outdoor merchandise display located on sidewalk shall be limited to push and riding mowers, garden carts, log splitters, blowers, dog houses and kennels, wheelbarrows, bagged fertilizer, pine shavings, and bagged feed.

Mr. Doody clarified if those conditions were acceptable to the applicant. Mr. Hearing and Ms. Nylander discussed the outdoor merchandise display and asked for it to add the word or similar items. Further discussion on wording.

Mr. Doody stated the condition will read as subject to the approval of the City Manager. Applicants agreed with the condition.

UPON ROLL CALL:

Vice Mayor Langowski	YES
Mayor O'Connor	YES
Councilman Werner	NO
Councilman Martinez	YES
Councilwoman Leonard	YES

Motion carried, with Councilmember Werner dissenting (4-1).

Mayor O'Connor called for another motion regarding the waiver.

Motion by Vice Mayor Langowski to approve the requested waiver relative to the height of the fence, seconded by Councilwoman Leonard.

UPON ROLL CALL:

Mayor O'Connor	YES
Councilman Werner	YES
Councilman Martinez	YES
Councilwoman Leonard	YES
Vice Mayor Langowski	YES

With all in favor, motion carried without dissent (5-0).

- B. SPR-2023-01:** The applicant is requesting approval of a Site Plan Review for a Bank with Drive Through for Parcel C within the Westlake Plaza development. Parcel C is located on the east side of the Westlake Plaza site, abutting the south side of Parcel B. The proposed Bank with Drive Through consists of a 1,956 sq.ft. building with dual drive-through lanes.

Submitted By: Planning and Zoning

Mayor O'Connor introduced item. Mr. Doody swore in all witnesses who would be providing testimony.

Mr. Doody read the Resolution, by title only, into the record.

Staff presentation by Mr. Leon, on behalf of the City.

Council discussed if code prevents the driving of a golf cart through a drive thru.

Applicant presentation, presented by Mr. Donaldson Hearing of Cotleur & Hearing on behalf of Public Supermarket, Inc.

Mr. Doody asked for clarification on who the property owner is. Mr. Hearing confirmed Publix Super Market, Inc. is the property owner.

Council and staff discussed item in further detail.

Mr. Doody asked for members to disclose any ex-parte communications if any. Mayor O'Connor stated he was sure he had spoken with someone regarding the project.

Mayor O'Connor called for public comments, there being none, Mayor O'Connor called for a motion.

Motion by Councilman Werner to approve Site Plan review for Fifth Third Bank SPR 2023-01 as recommended by staff, seconded by Councilwoman Leonard.

UPON ROLL CALL:

Councilman Werner	YES
Councilman Martinez	YES
Councilwoman Leonard	YES
Vice Mayor Langowski	YES
Mayor O'Connor	YES

With all in favor, motion carried without dissent (5-0).

NEW BUSINESS

- A. Art In Public Places Advisory Board - Consideration and Appointment of Carole Waldman as a Regular Advisory Board Member

Submitted By: City Clerk's Office

RESOLUTION NO. 2024-10

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, APPOINTING ONE (1) MEMBER TO SERVE ON THE ART IN PUBLIC PLACES ADVISORY BOARD; PROVIDING FOR CONFLICTS, PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

Mayor O'Connor introduced the item.

Mr. Doody called for motion to appoint the board member prior to the consideration of the resolution.

Mayor O'Connor called for a motion.

Motion by Councilman Werner to appoint Carole Waldman to the Art in Public Places Committee, seconded by Councilwoman Leonard.

UPON ROLL CALL:

Councilman Werner	YES
Councilman Martinez	YES
Councilwoman Leonard	YES

Vice Mayor Langowski YES
Mayor O'Connor YES

With all in favor, motion carried without dissent (5-0).

Mayor O'Connor called for Mr. Doody to read the Resolution, by title only, into the record to include Ms. Waldman.

Mr. Doody read the Resolution, by title only, into the record.

Mayor O'Connor called for a motion.

Motion by Councilman Werner to approve Resolution 2024-10 for the appointment of Carole Waldman to the Art in Public Places Advisory Board, seconded by Vice Mayor Langowski.

UPON ROLL CALL:

Councilwoman Leonard YES
Vice Mayor Langowski YES
Mayor O'Connor YES
Councilman Werner YES
Councilman Martinez YES

With all in favor, motion carried without dissent (5-0).

B. City of Westlake 5k - Discussion and Action for Donation of Surplus Funds

Submitted By: Administration

RESOLUTION NO. 2024-11

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, APPROVING THE DONATION OF SURPLUS FUNDS IN THE AMOUNT OF \$_____ TO _____ SCHOOL; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

Mayor O'Connor introduced the item.

Council discussed the surplus of funds (\$2,014.02) and agreed the funds to go to Golden Groves Elementary School to be facilitated by the Education Advisory Board.

Council discussed item further.

Mayor O'Connor called for a motion.

Motion by Councilman Werner to approve the use of surplus funds from the 5K to be given to Golden Groves Elementary School, seconded by Vice Mayor Langowski.

Mr. Doody asked to read the Resolution, by title only, into record.

UPON ROLL CALL:

Vice Mayor Langowski YES
Mayor O'Connor YES
Councilman Werner YES
Councilman Martinez YES

Councilwoman Leonard YES

With all in favor, motion carried without dissent (5-0).

CITY COUNCIL COMMENTS

- A. Councilwoman Charlotte Leonard – No further comments.
- B. Councilman Julian Martinez – Councilman Martinez discussed the new businesses coming to the city and the upcoming FourthFest.
- C. Councilman Gary Werner – No further comments.
- D. Vice Mayor Greg Langowski – Vice Mayor Langowski discussed for council and staff to look into having a flag and a statue for the city.
- E. Mayor JohnPaul O'Connor – Mayor O'Connor is looking forward to FourthFest.

REPORT – STAFF

Chief Vomero of the Palm Beach County Fire Department discussed the Palm Beach County Fire Rescue monthly response times report for the City.

Sergeant Gaudreau of the Palm Beach County Sheriff's Office discussed the monthly response time report for the City of Westlake.

REPORT - CITY ATTORNEY

REPORT - CITY MANAGER

Mr. Cassel clarified if there is an iguana issue and it is behind the gate it is an HOA issue, if it is on Seminole Improvement District Property or right-of-way, Seminole Improvement District will address those.

PUBLIC COMMENTS AND REQUESTS

Public Comment – Daniel Hirsch -15227 Goldfinch Circle – Mr. Hirsch asked about the golf cart path at the schools located in Westlake.

ADJOURNMENT

There being no further business, Mayor O'Connor adjourned the meeting at 8:12 PM.

Zoie P. Burgess, City Clerk

JohnPaul O'Connor, Mayor

File Attachments for Item:

D. Monthly Financial Report - April 2024



MEMORANDUM

TO: Members of the City Council, City of Westlake
FROM: Steven Fowler, Accountant
CC: Ken Cassel, City Manager
DATE: June 3, 2024
SUBJECT: April Financial Report-REVISED

Please find attached the April 2024 financial report. During your review, please keep in mind that the goal is for revenue to meet or exceed the year-to-date budget and for expenditures to be at or below the year-to-date budget. An overview of the City's funds is provided below. Should you have any questions or require additional information, please contact me at Steven.Fowler@inframark.com.

General Fund

- Total Revenues through April were approximately 92% of the annual budget. Collections of the FY2024 Ad Valorem Tax and Special Assessments were approximately 98% and 99%, respectively.
- Total Expenditures and Contingency through April were approximately 52% of the annual budget.

Special Revenue Fund – Housing Assistance Program

- Total Revenues through April were approximately 185% of the annual budget, which was a result of a higher than anticipated rate of construction and donations on commercial permits. A donation of \$1,500 per Single Family Residence building permit is paid into the Housing Assistance Program.

Special Revenue Fund – Comprehensive Planning Services

- Total Revenues through April were approximately 26% of the annual budget.
- Total Expenditures through April were approximately 46% of the annual budget.

City of Westlake

Financial Report-REVISED

April 30, 2024



Table of Contents

<u>FINANCIAL STATEMENTS</u>	Page #
Balance Sheet	1 - 2
Statement of Revenues, Expenditures and Changes in Fund Balance	
General Fund	3 - 6
Special Revenue Fund (Housing Assistance Program)	7
Special Revenue Fund (Comprehensive Planning Services)	8 - 9
 <u>SUPPORTING SCHEDULES</u>	
Cash and Investment Report	10

City of Westlake

Financial Statements

April 30, 2024

Balance Sheet
April 30, 2024

ACCOUNT DESCRIPTION	GENERAL FUND	SPECIAL REVENUE FUND - HOUSING ASSISTANCE PROGRAM	SPECIAL REVENUE FUND - COMPREHENSIVE PLANNING SVCS	TOTAL
<u>ASSETS</u>				
Current Assets				
Cash - Checking Account	\$ 1,894,446	\$ -	\$ -	\$ 1,894,446
Assessments Receivable	41,017	-	-	41,017
Due From Other Districts	7,779	-	-	7,779
Due from Vendor	165	-	-	165
Due From Other Funds	-	-	196,820	196,820
Investments:				
Money Market Account	5,947,175	4,333,331	-	10,280,506
Prepaid Items	5,159	-	-	5,159
Deposits	666	-	-	666
Total Current Assets	7,896,407	4,333,331	196,820	12,426,558
Noncurrent Assets				
Mortgages Receivable	-	598,373	-	598,373
Total Noncurrent Assets	-	598,373	-	598,373
TOTAL ASSETS	\$ 7,896,407	\$ 4,931,704	\$ 196,820	\$ 13,024,931
<u>LIABILITIES</u>				
Current Liabilities				
Accounts Payable	\$ 121,314	\$ -	\$ 144,155	\$ 265,469
Accrued Expenses	211,679	-	67,535	279,214
DBPR surcharge	1,177	-	-	1,177
DCA surcharge	1,522	-	-	1,522
Impact Fees	123,179	-	-	123,179
Unearned Revenue	486,876	-	-	486,876
Due To Other Districts	(552)	-	-	(552)
Due To Other Gov'tl Units	420	-	-	420
Deferred Revenue-Developer Submittals (Minto)	-	-	62,220	62,220
Due To Other Funds	196,820	-	-	196,820
Total Current Liabilities	1,142,435	-	273,910	1,416,345
Long-Term Liabilities				
Deferred Inflow of Resources	41,406	-	-	41,406
Total Long-Term Liabilities	41,406	-	-	41,406
TOTAL LIABILITIES	1,183,841	-	273,910	1,457,751

Balance Sheet
April 30, 2024

ACCOUNT DESCRIPTION	GENERAL FUND	SPECIAL REVENUE FUND - HOUSING ASSISTANCE PROGRAM	SPECIAL REVENUE FUND - COMPREHENSIVE PLANNING SVCS	TOTAL
<u>FUND BALANCES</u>				
Nonspendable:				
Prepaid Items	5,159	-	-	5,159
Deposits	666	-	-	666
Restricted for:				
Special Revenue	-	4,931,704	-	4,931,704
Unassigned:	6,706,741	-	(77,090)	6,629,651
TOTAL FUND BALANCES	\$ 6,712,566	\$ 4,931,704	\$ (77,090)	\$ 11,567,180
TOTAL LIABILITIES & FUND BALANCES	\$ 7,896,407	\$ 4,931,704	\$ 196,820	\$ 13,024,931

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending April 30, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
REVENUES				
Interest - Investments	\$ -	\$ -	\$ 109,046	\$ 109,046
Ad Valorem Taxes	4,721,257	4,721,257	4,618,167	(103,090)
Ad Valorem Taxes - Prior Years	-	-	1,894	1,894
Ad Valorem Taxes - Discounts	(188,850)	(188,850)	(179,232)	9,618
FPL Franchise	365,200	213,033	243,224	30,191
Gas	60,100	35,058	152,959	117,901
Solid Waste	22,200	12,950	14,507	1,557
Electricity	430,600	251,183	244,926	(6,257)
Water	109,000	63,583	73,743	10,160
Gas	102,900	60,025	63,280	3,255
Communication Services Taxes	148,400	86,567	82,221	(4,346)
Occupational Licenses	6,100	3,558	7,012	3,454
Building Permits - Admin Fee	95,700	55,825	45,203	(10,622)
State Revenue Sharing Proceeds	43,200	25,200	25,167	(33)
Alcoholic Beverage License	-	-	575	575
Other Public Safety Chrgs/Fees	5,400	3,150	4,374	1,224
Garbage/Solid Waste Revenue	228,900	133,525	48,432	(85,093)
Other Operating Revenues	13,200	6,600	6,468	(132)
Special Events	-	-	6,675	6,675
Event Sponsors	-	-	47,150	47,150
Judgements and Fines	-	-	3,676	3,676
Interest - Tax Collector	-	-	4,580	4,580
Special Assmnts- Tax Collector	499,468	499,468	495,962	(3,506)
Special Assmnts- Delinquent	-	-	281	281
Special Assmnts- Discounts	(19,979)	(19,979)	(19,306)	673
Other Miscellaneous Revenues	-	-	815	815
Lien Search Fee	5,900	3,442	6,745	3,303
TOTAL REVENUES	6,648,696	5,965,595	6,108,544	142,949

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending April 30, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
<u>EXPENDITURES</u>				
<u>Legislative</u>				
Mayor/Council Stipend	60,000	35,000	35,000	-
FICA Taxes	4,600	2,683	2,678	5
ProfServ-Legislative Expense	24,000	14,000	-	14,000
Telephone, Cable & Internet Service	3,800	2,217	3,154	(937)
Lease - Building	16,000	9,333	5,000	4,333
Public Officials Insurance	4,200	4,200	4,557	(357)
Misc-Election Fee	-	-	240	(240)
Misc-Event Expense	250,000	50,000	60,416	(10,416)
Council Expenses	50,000	29,167	44,487	(15,320)
Dues, Licenses, Subscriptions	1,600	1,300	3,342	(2,042)
Total Legislative	414,200	147,900	158,874	(10,974)
<u>City Manager</u>				
Contracts-City Manager	220,000	128,333	130,113	(1,780)
Office Supplies	12,300	7,175	5,400	1,775
Dues, Licenses, Subscriptions	2,900	1,461	2,420	(959)
Total City Manager	235,200	136,969	137,933	(964)
<u>City Clerk</u>				
ProfServ-Web Site Maintenance	6,100	4,183	5,782	(1,599)
Contracts-City Clerk	218,600	127,517	127,517	-
Postage and Freight	1,500	875	500	375
Printing	15,500	9,042	7	9,035
Legal Advertising	23,200	13,533	5,420	8,113
Miscellaneous Services	1,300	758	404	354
Miscellaneous Expenses	-	-	545	(545)
Office Supplies	2,900	1,692	-	1,692
Dues, Licenses, Subscriptions	19,700	14,240	15,601	(1,361)
Total City Clerk	288,800	171,840	155,776	16,064
<u>Finance</u>				
Auditing Services	7,000	-	-	-
Contracts-Finance	85,600	49,933	51,206	(1,273)
Total Finance	92,600	49,933	51,206	(1,273)

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending April 30, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
<u>Legal Counsel</u>				
ProfServ-Legal Services	101,400	59,150	47,737	11,413
Total Legal Counsel	101,400	59,150	47,737	11,413
<u>Other Administrative Services</u>				
ProfServ-Info Technology	81,100	47,308	47,364	(56)
Contracts-Admin. Service	286,100	166,892	168,838	(1,946)
Misc-Assessment Collection Cost	5,000	5,000	4,407	593
General Government	150,000	87,500	19,101	68,399
Total Other Administrative Services	522,200	306,700	239,710	66,990
<u>Facility Services</u>				
Telephone, Cable & Internet Service	16,200	9,450	7,094	2,356
Lease - Copier	12,500	7,292	7,475	(183)
Lease - Building	86,700	50,575	-	50,575
Insurance (Liab,Auto,Property)	8,100	8,100	11,017	(2,917)
Miscellaneous Services	1,700	992	523	469
Cleaning Services	26,000	15,167	11,781	3,386
Principal-Capital Lease	18,200	11,178	16,384	(5,206)
Interest-Capital Lease	4,400	2,593	4,036	(1,443)
Total Facility Services	173,800	105,347	58,310	47,037
<u>Community Services</u>				
Contracts-Solid Waste	926,300	540,342	606,131	(65,789)
Contracts-Sheriff	1,025,600	598,267	598,257	10
Electricity	142,700	83,242	78,043	5,199
R&M-Community Maintenance	29,100	16,975	16,975	-
Operating Supplies	57,300	28,650	27,955	695
Roadway Services	28,000	14,000	17,500	(3,500)
Total Community Services	2,209,000	1,281,476	1,344,861	(63,385)
<u>Capital Expenditures & Projects</u>				
Capital Improvements	50,000	50,000	-	50,000
Cap Outlay - Equipment	-	-	37,761	(37,761)
Total Capital Expenditures & Projects	50,000	50,000	37,761	12,239

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending April 30, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
<u>Reserves</u>				
Misc-Contingency	201,900	117,775	13,094	104,681
1st Quarter Operating Reserves	1,059,800	618,217	-	618,217
Reserve - Capital Projects	200,000	116,667	-	116,667
Total Reserves	1,461,700	852,659	13,094	839,565
TOTAL EXPENDITURES & RESERVES				
	5,548,900	3,161,974	2,245,262	916,712
Excess (deficiency) of revenues				
Over (under) expenditures	1,099,796	2,803,621	3,863,282	1,059,661
<u>OTHER FINANCING SOURCES (USES)</u>				
Contribution to (Use of) Fund Balance	1,099,796	-	-	-
TOTAL FINANCING SOURCES (USES)	1,099,796	-	-	-
Net change in fund balance	\$ 1,099,796	\$ 2,803,621	\$ 3,863,282	\$ 1,059,661
FUND BALANCE, BEGINNING (OCT 1, 2023)	2,849,284	2,849,284	2,849,284	
FUND BALANCE, ENDING	\$ 3,949,080	\$ 5,652,905	\$ 6,712,566	

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending April 30, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
<u>REVENUES</u>				
Interest - Investments	\$ -	\$ -	\$ 95,664	\$ 95,664
Dividends	-	-	23,302	23,302
Donations	300,000	175,000	435,000	260,000
TOTAL REVENUES	300,000	175,000	553,966	378,966
<u>EXPENDITURES</u>				
<u>Public Assistance</u>				
Misc-Admin Fee (%)	21,000	12,250	3,990	8,260
Assistance Program	279,000	162,750	-	162,750
Total Public Assistance	300,000	175,000	3,990	171,010
TOTAL EXPENDITURES	300,000	175,000	3,990	171,010
Excess (deficiency) of revenues Over (under) expenditures	-	-	549,976	549,976
Net change in fund balance	\$ -	\$ -	\$ 549,976	\$ 549,976
FUND BALANCE, BEGINNING (OCT 1, 2023)	4,381,728	4,381,728	4,381,728	
FUND BALANCE, ENDING	\$ 4,381,728	\$ 4,381,728	\$ 4,931,704	

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending April 30, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
REVENUES				
Building Permits	\$ 2,284,500	\$ 1,332,625	\$ 611,548	\$ (721,077)
Reinspection Fees	4,800	2,800	300	(2,500)
Building Permits - Surcharge	4,200	2,450	3,971	1,521
Other Building Permit Fees	30,000	17,500	52,800	35,300
Building Permits - Admin Fee	135,400	78,983	71,138	(7,845)
Engineering Permits	330,500	192,792	41,447	(151,345)
Planning & Zoning Permits	293,200	171,033	32,191	(138,842)
TOTAL REVENUES	3,082,600	1,798,183	813,395	(984,788)

EXPENDITURES

Comprehensive Planning

ProfServ-Engineering	308,500	179,958	98,277	81,681
ProfServ-Info Technology	200,800	117,133	153,890	(36,757)
ProfServ-Legal Services	75,300	43,925	15,690	28,235
ProfServ-Planning/Zoning Board	293,200	171,033	179,588	(8,555)
ProfServ-Compliance Service	185,800	108,383	122,400	(14,017)
ProfServ-Consultants	22,000	12,833	-	12,833
ProfServ-Building Permits	1,796,000	1,047,667	751,501	296,166
Outside Legal Services	1,800	1,050	-	1,050
Telephone, Cable & Internet Service	5,300	3,092	3,104	(12)
Lease - Copier	6,800	3,967	3,040	927
Lease - Building	43,400	25,317	-	25,317
Printing	2,200	1,283	713	570
Miscellaneous Services	1,300	758	9,374	(8,616)
Misc-Admin Fee (%)	116,600	68,017	60,934	7,083
Office Supplies	2,100	1,225	445	780
Cleaning Services	15,900	9,275	11,250	(1,975)
Principal-Capital Lease	4,500	2,744	-	2,744
Interest-Capital Lease	1,100	648	-	648
Total Comprehensive Planning	3,082,600	1,798,308	1,410,206	388,102
TOTAL EXPENDITURES	3,082,600	1,798,308	1,410,206	388,102

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending April 30, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
Excess (deficiency) of revenues				
Over (under) expenditures	-	(125)	(596,811)	(596,686)
Net change in fund balance	\$ -	\$ (125)	\$ (596,811)	\$ (596,686)
FUND BALANCE, BEGINNING (OCT 1, 2023)	519,721	519,719	519,721	
FUND BALANCE, ENDING	\$ 519,721	\$ 519,594	\$ (77,090)	

City of Westlake

Supporting Schedules

April 30, 2024

Cash and Investment Report

April 30, 2024

GENERAL FUND

<u>Account Name</u>	<u>Bank Name</u>	<u>Investment Type</u>	<u>Yield</u>	<u>Balance</u>
Checking Account - Operating	BankUnited	Checking Account	n/a	\$1,894,446
Money Market	BankUnited	MMA	5.25%	\$5,947,175
		Subtotal		\$7,841,621

SPECIAL REVENUE FUND

Money Market	BankUnited	MMA	5.25%	\$1,203,887
Government Checking	Valley Bank	Checking Account	5.25%	\$66,134
Brokerage Account	Valley Bank	Government Fund Class A	4.93%	\$3,063,310
		Subtotal		\$4,333,331
		Total		\$12,174,952

File Attachments for Item:

E. Monthly Financial Report - May 2024



MEMORANDUM

TO: Members of the City Council, City of Westlake
FROM: Steven Fowler, Accountant
CC: Ken Cassel, City Manager
DATE: June 18, 2024
SUBJECT: May Financial Report

Please find attached the May 2024 financial report. During your review, please keep in mind that the goal is for revenue to meet or exceed the year-to-date budget and for expenditures to be at or below the year-to-date budget. An overview of the City's funds is provided below. Should you have any questions or require additional information, please contact me at Steven.Fowler@inframark.com.

General Fund

- Total Revenues through May were approximately 93% of the annual budget. Collections of the FY2024 Ad Valorem Tax and Special Assessments were approximately 95% and 100%, respectively.
- Total Expenditures and Contingency through May were approximately 61% of the annual budget.

Special Revenue Fund – Housing Assistance Program

- Total Revenues through May were approximately 207% of the annual budget, which was a result of a higher than anticipated rate of construction and donations on commercial permits. A donation of \$1,500 per Single Family Residence building permit is paid into the Housing Assistance Program.

Special Revenue Fund – Comprehensive Planning Services

- Total Revenues through May were approximately 29% of the annual budget.
- Total Expenditures through May were approximately 51% of the annual budget.

City of Westlake

Financial Report

May 31, 2024



Table of Contents

<u>FINANCIAL STATEMENTS</u>	Page #
Balance Sheet	1 - 2
Statement of Revenues, Expenditures and Changes in Fund Balance	
General Fund	3 - 6
Special Revenue Fund (Housing Assistance Program)	7
Special Revenue Fund (Comprehensive Planning Services)	8 - 9
 <u>SUPPORTING SCHEDULES</u>	
Cash and Investment Report	10

City of Westlake

Financial Statements

May 31, 2024

Balance Sheet
May 31, 2024

ACCOUNT DESCRIPTION	GENERAL FUND	SPECIAL REVENUE FUND - HOUSING ASSISTANCE PROGRAM	SPECIAL REVENUE FUND - COMPREHENSIVE PLANNING SVCS	TOTAL
ASSETS				
Current Assets				
Cash - Checking Account	\$ 1,948,691	\$ -	\$ -	\$ 1,948,691
Assessments Receivable	41,154	-	-	41,154
Due From Other Districts	7,124	-	-	7,124
Due from Vendor	30	-	-	30
Due From Other Funds	-	-	109,970	109,970
Investments:				
Money Market Account	5,872,880	4,400,917	-	10,273,797
Deposits	666	-	-	666
Total Current Assets	7,870,545	4,400,917	109,970	12,381,432
Noncurrent Assets				
Mortgages Receivable	-	598,373	-	598,373
Total Noncurrent Assets	-	598,373	-	598,373
TOTAL ASSETS	\$ 7,870,545	\$ 4,999,290	\$ 109,970	\$ 12,979,805
LIABILITIES				
Current Liabilities				
Accounts Payable	\$ 403,268	\$ -	\$ 53,077	\$ 456,345
Accrued Expenses	120,900	-	159,956	280,856
DBPR surcharge	2,401	-	-	2,401
DCA surcharge	3,294	-	-	3,294
Impact Fees	251,320	-	-	251,320
Unearned Revenue	514,895	-	-	514,895
Due To Other Gov'tl Units	1,753	-	-	1,753
Refunds/Overpayments	863	-	-	863
Deferred Revenue-Developer Submittals (Minto)	-	-	62,220	62,220
Due To Other Funds	109,970	-	-	109,970
Total Current Liabilities	1,408,664	-	275,253	1,683,917
Long-Term Liabilities				
Deferred Inflow of Resources	41,154	-	-	41,154
Total Long-Term Liabilities	41,154	-	-	41,154
TOTAL LIABILITIES	1,449,818	-	275,253	1,725,071

Balance Sheet
May 31, 2024

ACCOUNT DESCRIPTION	GENERAL FUND	SPECIAL REVENUE FUND - HOUSING ASSISTANCE PROGRAM	SPECIAL REVENUE FUND - COMPREHENSIVE PLANNING SVCS	TOTAL
<u>FUND BALANCES</u>				
Nonspendable:				
Deposits	666	-	-	666
Restricted for:				
Special Revenue	-	4,999,290	-	4,999,290
Unassigned:	6,420,061	-	(165,283)	6,254,778
TOTAL FUND BALANCES	\$ 6,420,727	\$ 4,999,290	\$ (165,283)	\$ 11,254,734
TOTAL LIABILITIES & FUND BALANCES	\$ 7,870,545	\$ 4,999,290	\$ 109,970	\$ 12,979,805

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending May 31, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
REVENUES				
Interest - Investments	\$ -	\$ -	\$ 134,747	\$ 134,747
Ad Valorem Taxes	4,721,257	4,721,257	4,508,208	(213,049)
Ad Valorem Taxes - Prior Years	-	-	1,894	1,894
Ad Valorem Taxes - Discounts	(188,850)	(188,850)	(179,232)	9,618
FPL Franchise	365,200	243,467	271,053	27,586
Gas	60,100	40,067	152,959	112,892
Solid Waste	22,200	14,800	14,921	121
Electricity	430,600	287,067	283,365	(3,702)
Water	109,000	72,667	85,023	12,356
Gas	102,900	68,600	73,853	5,253
Communication Services Taxes	148,400	98,933	94,769	(4,164)
Occupational Licenses	6,100	4,067	8,374	4,307
Building Permits - Admin Fee	95,700	63,800	51,064	(12,736)
State Revenue Sharing Proceeds	43,200	28,800	28,763	(37)
Alcoholic Beverage License	-	-	575	575
Other Public Safety Chrgs/Fees	5,400	3,600	5,986	2,386
Garbage/Solid Waste Revenue	228,900	152,600	61,396	(91,204)
Other Operating Revenues	13,200	9,900	7,968	(1,932)
Special Events	-	-	7,900	7,900
Event Sponsors	-	-	54,150	54,150
Judgements and Fines	-	-	4,193	4,193
Interest - Tax Collector	-	-	4,580	4,580
Special Assmnts- Tax Collector	499,468	499,468	501,477	2,009
Special Assmnts- Delinquent	-	-	281	281
Special Assmnts- Discounts	(19,979)	(19,979)	(19,306)	673
Other Miscellaneous Revenues	-	-	815	815
Lien Search Fee	5,900	3,933	8,075	4,142
TOTAL REVENUES	6,648,696	6,104,197	6,167,851	63,654

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending May 31, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
<u>EXPENDITURES</u>				
<u>Legislative</u>				
Mayor/Council Stipend	60,000	40,000	40,000	-
FICA Taxes	4,600	3,067	3,060	7
ProfServ-Legislative Expense	24,000	16,000	-	16,000
Telephone, Cable & Internet Service	3,800	2,533	3,154	(621)
Lease - Building	16,000	10,667	5,500	5,167
Public Officials Insurance	4,200	4,200	4,557	(357)
Misc-Election Fee	-	-	240	(240)
Misc-Event Expense	250,000	50,000	144,785	(94,785)
Council Expenses	50,000	33,333	48,386	(15,053)
Dues, Licenses, Subscriptions	1,600	1,300	3,342	(2,042)
Total Legislative	414,200	161,100	253,024	(91,924)
<u>City Manager</u>				
Contracts-City Manager	220,000	146,667	150,226	(3,559)
Office Supplies	12,300	8,200	6,367	1,833
Dues, Licenses, Subscriptions	2,900	1,472	2,420	(948)
Total City Manager	235,200	156,339	159,013	(2,674)
<u>City Clerk</u>				
ProfServ-Web Site Maintenance	6,100	4,567	6,291	(1,724)
Contracts-City Clerk	218,600	145,733	145,733	-
Postage and Freight	1,500	1,000	537	463
Printing	15,500	10,333	7	10,326
Legal Advertising	23,200	15,467	4,765	10,702
Miscellaneous Services	1,300	867	404	463
Miscellaneous Expenses	-	-	545	(545)
Office Supplies	2,900	1,933	-	1,933
Dues, Licenses, Subscriptions	19,700	16,710	18,108	(1,398)
Total City Clerk	288,800	196,610	176,390	20,220
<u>Finance</u>				
Auditing Services	7,000	-	-	-
Contracts-Finance	85,600	57,067	59,613	(2,546)
Total Finance	92,600	57,067	59,613	(2,546)

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending May 31, 2024

<u>ACCOUNT DESCRIPTION</u>	<u>ANNUAL ADOPTED BUDGET</u>	<u>YEAR TO DATE BUDGET</u>	<u>YEAR TO DATE ACTUAL</u>	<u>VARIANCE (\$) FAV(UNFAV)</u>
<u>Legal Counsel</u>				
ProfServ-Legal Services	101,400	67,600	54,537	13,063
Total Legal Counsel	101,400	67,600	54,537	13,063
<u>Other Administrative Services</u>				
ProfServ-Info Technology	81,100	54,067	48,614	5,453
Contracts-Admin. Service	286,100	190,733	196,707	(5,974)
Misc-Assessment Collection Cost	5,000	5,000	4,376	624
General Government	150,000	100,000	10,741	89,259
Total Other Administrative Services	522,200	349,800	260,438	89,362
<u>Facility Services</u>				
Telephone, Cable & Internet Service	16,200	10,800	7,790	3,010
Lease - Copier	12,500	8,333	8,524	(191)
Lease - Building	86,700	57,800	-	57,800
Insurance (Liab,Auto,Property)	8,100	8,100	11,017	(2,917)
Miscellaneous Services	1,700	1,133	523	610
Cleaning Services	26,000	17,333	12,637	4,696
Principal-Capital Lease	18,200	12,582	15,435	(2,853)
Interest-Capital Lease	4,400	2,955	3,925	(970)
Total Facility Services	173,800	119,036	59,851	59,185
<u>Community Services</u>				
Contracts-Solid Waste	926,300	617,533	692,731	(75,198)
Contracts-Sheriff	1,025,600	683,733	683,722	11
Electricity	142,700	95,133	78,088	17,045
R&M-Community Maintenance	29,100	19,400	19,400	-
Operating Supplies	57,300	42,975	27,955	15,020
Roadway Services	28,000	14,000	20,000	(6,000)
Total Community Services	2,209,000	1,472,774	1,521,896	(49,122)
<u>Capital Expenditures & Projects</u>				
Capital Improvements	50,000	50,000	-	50,000
Cap Outlay - Equipment	-	-	37,761	(37,761)
Total Capital Expenditures & Projects	50,000	50,000	37,761	12,239

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending May 31, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
<u>Reserves</u>				
Misc-Contingency	201,900	134,600	13,885	120,715
1st Quarter Operating Reserves	1,059,800	706,533	-	706,533
Reserve - Capital Projects	200,000	133,333	-	133,333
Total Reserves	1,461,700	974,466	13,885	960,581
TOTAL EXPENDITURES & RESERVES	5,548,900	3,604,792	2,596,408	1,008,384
Excess (deficiency) of revenues				
Over (under) expenditures	1,099,796	2,499,405	3,571,443	1,072,038
<u>OTHER FINANCING SOURCES (USES)</u>				
Contribution to (Use of) Fund Balance	1,099,796	-	-	-
TOTAL FINANCING SOURCES (USES)	1,099,796	-	-	-
Net change in fund balance	\$ 1,099,796	\$ 2,499,405	\$ 3,571,443	\$ 1,072,038
FUND BALANCE, BEGINNING (OCT 1, 2023)	2,849,284	2,849,284	2,849,284	
FUND BALANCE, ENDING	\$ 3,949,080	\$ 5,348,689	\$ 6,420,727	

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending May 31, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
<u>REVENUES</u>				
Interest - Investments	\$ -	\$ -	\$ 101,286	\$ 101,286
Dividends	-	-	35,766	35,766
Donations	300,000	200,000	484,500	284,500
TOTAL REVENUES	300,000	200,000	621,552	421,552
<u>EXPENDITURES</u>				
<u>Public Assistance</u>				
Misc-Admin Fee (%)	21,000	14,000	3,990	10,010
Assistance Program	279,000	186,000	-	186,000
Total Public Assistance	300,000	200,000	3,990	196,010
TOTAL EXPENDITURES	300,000	200,000	3,990	196,010
Excess (deficiency) of revenues Over (under) expenditures	-	-	617,562	617,562
Net change in fund balance	\$ -	\$ -	\$ 617,562	\$ 617,562
FUND BALANCE, BEGINNING (OCT 1, 2023)	4,381,728	4,381,728	4,381,728	
FUND BALANCE, ENDING	\$ 4,381,728	\$ 4,381,728	\$ 4,999,290	

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending May 31, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
<u>REVENUES</u>				
Building Permits	\$ 2,284,500	\$ 1,523,000	\$ 676,040	\$ (846,960)
Reinspection Fees	4,800	3,200	350	(2,850)
Building Permits - Surcharge	4,200	2,800	4,304	1,504
Other Building Permit Fees	30,000	20,000	57,633	37,633
Building Permits - Admin Fee	135,400	90,267	79,433	(10,834)
Engineering Permits	330,500	220,333	42,497	(177,836)
Planning & Zoning Permits	293,200	195,467	33,091	(162,376)
TOTAL REVENUES	3,082,600	2,055,067	893,348	(1,161,719)
<u>EXPENDITURES</u>				
<u>Comprehensive Planning</u>				
ProfServ-Engineering	308,500	205,667	109,746	95,921
ProfServ-Info Technology	200,800	133,867	177,779	(43,912)
ProfServ-Legal Services	75,300	50,200	17,890	32,310
ProfServ-Planning/Zoning Board	293,200	195,467	202,676	(7,209)
ProfServ-Compliance Service	185,800	123,867	118,800	5,067
ProfServ-Consultants	22,000	14,667	-	14,667
ProfServ-Building Permits	1,796,000	1,197,333	845,016	352,317
Outside Legal Services	1,800	1,200	-	1,200
Telephone, Cable & Internet Service	5,300	3,533	3,533	-
Lease - Copier	6,800	4,533	3,296	1,237
Lease - Building	43,400	28,933	-	28,933
Printing	2,200	1,467	713	754
Miscellaneous Services	1,300	867	370	497
Misc-Admin Fee (%)	116,600	77,733	63,571	14,162
Billing Service Fees	-	-	21,389	(21,389)
Office Supplies	2,100	1,400	445	955
Cleaning Services	15,900	10,600	13,125	(2,525)
Principal-Capital Lease	4,500	3,096	-	3,096
Interest-Capital Lease	1,100	739	-	739
Total Comprehensive Planning	3,082,600	2,055,169	1,578,349	476,820
TOTAL EXPENDITURES	3,082,600	2,055,169	1,578,349	476,820

Statement of Revenues, Expenditures and Changes in Fund Balances
For the Period Ending May 31, 2024

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)
Excess (deficiency) of revenues				
Over (under) expenditures	-	(102)	(685,001)	(684,899)
Net change in fund balance	\$ -	\$ (102)	\$ (685,001)	\$ (684,899)
FUND BALANCE, BEGINNING (OCT 1, 2023)	519,718	519,719	519,718	
FUND BALANCE, ENDING	\$ 519,718	\$ 519,617	\$ (165,283)	

City of Westlake

Supporting Schedules

May 31, 2024

Cash and Investment Report

May 31, 2024

GENERAL FUND

<u>Account Name</u>	<u>Bank Name</u>	<u>Investment Type</u>	<u>Yield</u>	<u>Balance</u>
Checking Account - Operating	BankUnited	Checking Account	n/a	\$1,948,691
Money Market	BankUnited	MMA	5.25%	\$5,872,880
		Subtotal		<u>\$7,821,571</u>

SPECIAL REVENUE FUND

Money Market	BankUnited	MMA	5.25%	\$1,258,720
Government Checking	Valley Bank	Checking Account	5.25%	\$66,425
Brokerage Account	Valley Bank	Government Fund Class A	4.88%	\$3,075,773
		Subtotal		<u>\$4,400,918</u>
		Total		<u>\$12,222,489</u>

File Attachments for Item:

A. RESOLUTION 2024-12 - Proposed Millage Rate for the Fiscal Year 2024-2025 Ad Valorem Tax and a Date, Time and Place for the First Public Budget Hearing

Submitted By: City Clerk's Office

RESOLUTION 2024-12

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, ADOPTING A PROPOSED MILLAGE RATE FOR THE CITY'S GENERAL OPERATING FUND FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024 AND ENDING SEPTEMBER 30, 2025; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.



Meeting Agenda Item Coversheet

MEETING DATE:		July 2, 2024	Submitted By: City Clerk's Office	
SUBJECT: <i>This will be the name of the Item as it will appear on the Agenda</i>		Proposed Millage Rate for the Fiscal Year 2024-2025 Ad Valorem Tax and a Date, Time and Place for the First Public Budget Hearing		
STAFF RECOMMENDATION: (MOTION READY)		Approval of Fiscal Year 2024-2025 Tentative Millage Rate and Date of First Public Budget Hearing		
SUMMARY and/or JUSTIFICATION:		Florida Statute 200.065 (TRiM-Truth in Millage) requires all municipalities, within 35 days of receipt of the City's certification of taxable value, to advise the Property Appraiser of a tentative millage rate and a date of first budget hearing to be included in the TRiM notice sent to each taxpayer.		
SELECT, if applicable	AGREEMENT:		BUDGET:	X
	STAFF REPORT:		PROCLAMATION:	
	EXHIBIT(S):		OTHER:	
IDENTIFY EACH ATTACHMENT. <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i>	<ul style="list-style-type: none"> - Resolution 2024-12 - Proposed Budget for Fiscal Year 2024-2025 			
SELECT, if applicable	RESOLUTION:		ORDINANCE:	
IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE <i>(if Item is <u>not</u> a Resolution or Ordinance, please erase all default text from this field's textbox and leave blank)</i> <u>Please keep text indented.</u>	<p style="text-align: center;">RESOLUTION 2024-12</p> <p>A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, ADOPTING A PROPOSED MILLAGE RATE FOR THE CITY'S GENERAL OPERATING FUND FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024 AND ENDING SEPTEMBER 30, 2025; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.</p>			
FISCAL IMPACT (if any):				\$

1
2
3
4
5
6
7
8
9

10
11
12
13
14
15
16
17
18
19

20
21
22
23
24
25
26
27
28
29

30
31
32
33
34

35
36

37
38
39

CITY OF WESTLAKE

RESOLUTION NO. 2024-12

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, ADOPTING A PROPOSED MILLAGE RATE FOR THE CITY’S GENERAL OPERATING FUND FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024 AND ENDING SEPTEMBER 30, 2025; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the proposed budget has been prepared estimating expenses and revenues of the City of Westlake, Florida for Fiscal Year 2024, with detailed information, including revenues to be derived from sources other than ad valorem levy, and the City Manager has made recommendations as to the amount to be appropriated for the ensuing year; and

WHEREAS, the City Council has met and considered the recommendations of City staff relative to the proposed budget and the proposed millage rate to be levied to carry on the government of the City for the ensuing year; and

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA:

SECTION 1. The foregoing "WHEREAS" clauses are hereby ratified and confirmed by the City Council and incorporated herein by this reference.

SECTION 2. The proposed operating millage rate necessary to be levied against ad valorem valuation of property subject to taxation in the City of Westlake, Florida to produce a sufficient sum which together with department and other revenues will be sufficient to pay for appropriations made in the preliminary budget for the fiscal year is hereby set at _____ mills.

SECTION 3. The proposed millage rate will be reflected in the Palm Beach County Appraiser TRIM Notice, which shall serve to notify all property owners of a public hearing to be held on the **3rd** day of September 2024 at **6 pm** for the purposes of hearing objections or criticisms of the tentative budget and tentative millage rate to be presented at that time.

SECTION 4. All Resolutions or parts of Resolutions in conflict herewith, be and the same are repealed to the extent of such conflict.

SECTION 5. CONFLICTS. All resolutions or parts of resolutions in conflict herewith are hereby repealed to the extent of such conflict.

1 **SECTION 6. SEVERABILITY.** If any clause, section, other part or application
2 of this Resolution is held by any court of competent jurisdiction to be
3 unconstitutional or invalid, in part or application, it shall not affect the validity of
4 the remaining portions or applications of this Resolution.

5
6 **SECTION 7. EFFECTIVE DATE.** This Resolution shall take effect
7 immediately upon its passage and adoption.

8
9 **PASSED AND APPROVED** by City Council for the City of Westlake, on this
10 **2nd** day of July 2024.

11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27

City of Westlake
JohnPaul O'Connor, Mayor

Zoie Burgess,CMC City Clerk

City of Westlake



FISCAL YEAR 2025

ANNUAL BUDGET

Table of Contents

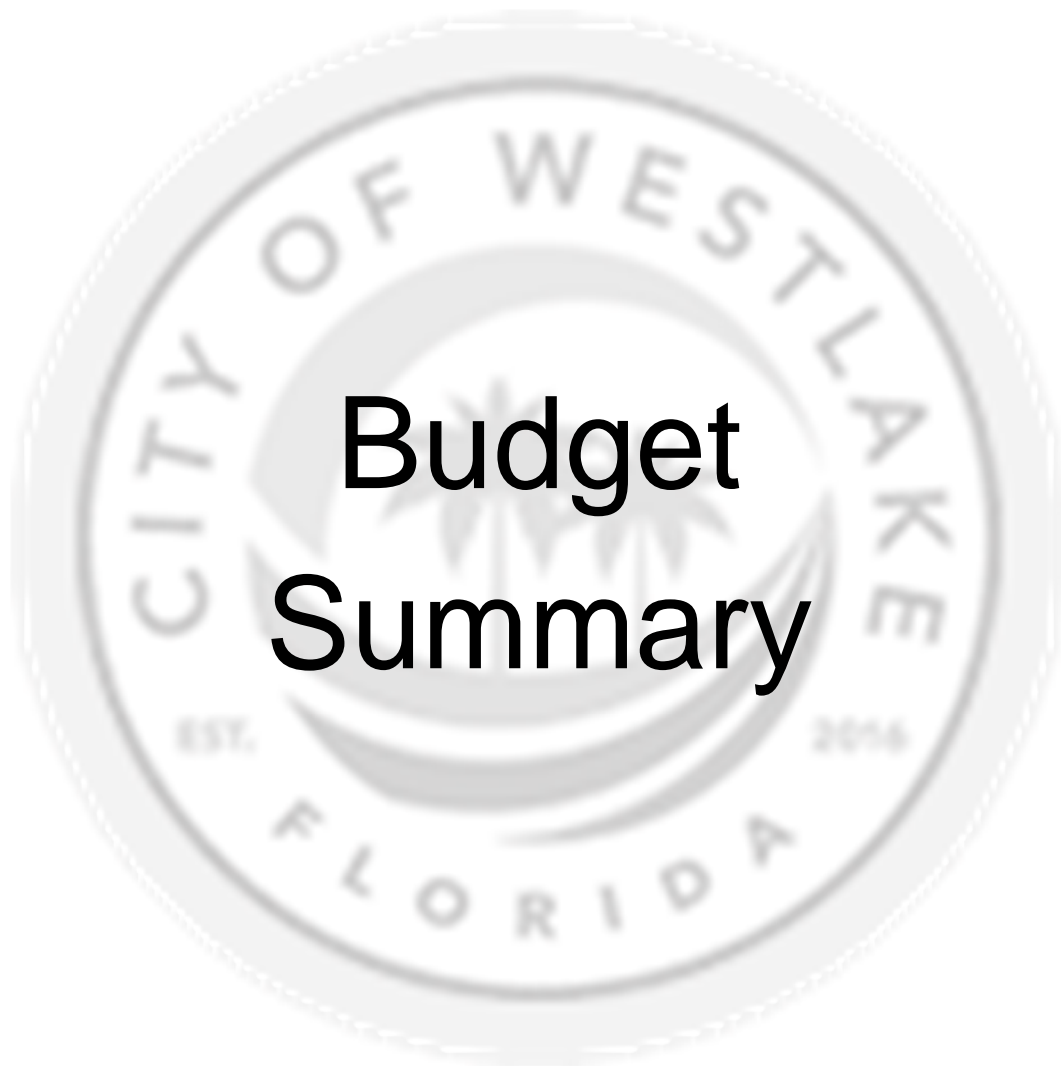
	<u>Page</u>
Budget Calendar	1
Budget Summary	2
General Fund Summary	3
General Fund Revenue Summary	4
General Fund Revenue	6
General Fund Expenditure Summary	7
City Council	9
City Manager	10
City Clerk	11
City Attorney	13
Community Services	14
Other Departments	15
Special Revenue Fund Summary	16
Special Revenue Fund – Comprehensive Planning	17
Special Revenue Fund – Housing Assistance Program	18

City of Westlake

Budget Calendar - Fiscal Year 2025 Annual Budget

Key Dates	Activity / Tasks	
May 21	City of Westlake Budget Workshop	
By June 1	Receipt of Estimated Assessable Property Values	
Mon July 1	Property Appraiser certifies the taxable values	
Tue July 2	City of Westlake Regular Council Meeting – Preliminary Budget Presentation; Approve Tentative Millage Rate and date of first public hearing; Set assessment rate for solid waste collection.	
Wed July 31	County School Board Budget 1st Hearing	**
Sun August 4	Deadline for submitting DR 420 to Property Appraiser & Tax Collector a) Include Proposed Millage Rate b) the current rollback rate c) The date, time, and meeting place of the first public budget hearing	
Tue August 6	City of Westlake Budget Workshop	
Tue September 3	City of Westlake Special Council Meeting – 1 ST Budget Hearing	
Wed September 4	County School Board Budget 2nd Hearing	**
Tue September 10	Palm Beach County 1 st Hearing	**
Wed September 11	City of Westlake Special Council Meeting - 2nd and Final Budget Hearing ALL COUNCIL MEMBERS MUST BE IN ATTENDANCE	
Fri September 13	Deadline to Send Adopted Millage Rate to Property Appraiser & Tax Collector	
Tues September 17	Palm Beach County 2nd Hearing	**
Thu October 11	Deadline to Certify Compliance with Florida Department of Revenue	

** Per Florida Statutes, the public hearing dates scheduled by a county government or school board shall not be used by any other taxing authority within the county for its public hearings.



Budget Summary

**City of Westlake
Fiscal Year 2025 Budget**

All Funds – Total Budget

Description	FY 2024			FY 2025		
	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./(Decr.) Over Budget	% Budget Incr./(Decr.)
FUNDING						
Total Revenue/Other Financing Sources	\$ 10,031,296	\$ 9,756,787	\$ (274,511)	\$ 12,085,400	\$ 2,054,104	20.5%
Total Fund Bal. Use / (Addition)	(1,099,796)	(3,483,364)	(2,383,568)	(1,728,400)	(628,604)	NA
Total Funding	\$ 8,931,500	\$ 6,273,423	\$ (2,658,078)	\$ 10,357,000	\$ 1,425,500	16.0%
EXPENDITURES						
Personnel Expenditures	\$ 64,600	\$ 64,560	\$ 40	\$ 64,600	\$ -	0.0%
Operating Expenditures	7,355,200	6,157,217	1,197,983	7,362,500	7,300	0.1%
Capital Expenditures	50,000	37,761	12,239	50,000	-	0.0%
Contingency	201,900	13,885	188,015	220,800	18,900	9.4%
Reserves	1,259,800	-	1,259,800	2,659,100	1,399,300	111.1%
Total Expenditures	\$ 8,931,500	\$ 6,273,423	\$ 2,658,077	\$ 10,357,000	\$ 1,425,500	16.0%



**City of Westlake
Fiscal Year 2025 Budget**

General Fund – Summary

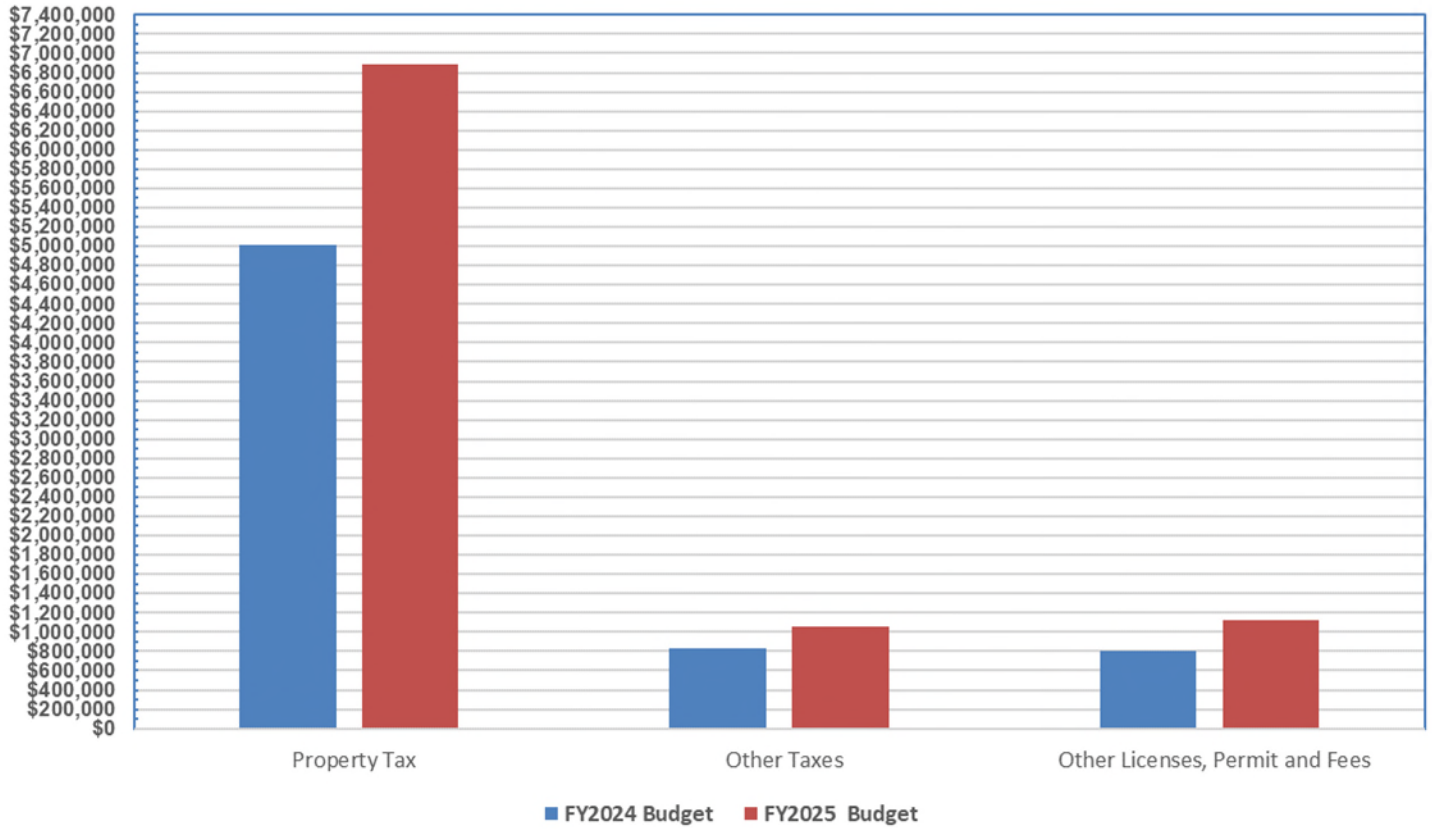
Description	FY 2024			FY 2025		
	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./ (Decr.) Over Budget	% Budget Incr./ (Decr.)
FUNDING						
Total Revenue	\$ 6,648,696	\$ 7,230,059	\$ 581,363	\$ 9,073,900	\$ 2,425,204	36.5%
Total Fund Bal. Use / (Addition)	(1,099,796)	(3,347,396)	(2,247,600)	(1,728,400)	(628,604)	57.2%
Total Funding	\$ 5,548,900	\$ 3,882,663	\$ (1,666,237)	\$ 7,345,500	\$ 1,796,600	32.4%
EXPENDITURES						
Personnel Expense	\$ 64,600	\$ 64,560	\$ 40	\$ 64,600	\$ -	0.0%
Operating Expense	3,972,600	3,766,457	206,143	4,351,000	378,400	9.5%
Capital Expenditures	50,000	37,761	12,239	50,000	-	0.0%
Contingency	201,900	13,885	188,015	220,800	18,900	9.4%
Reserves	1,259,800	-	1,259,800	2,659,100	1,399,300	111.1%
Total Expenditures	\$ 5,548,900	\$ 3,882,663	\$ 1,666,237	\$ 7,345,500	\$ 1,796,600	32.4%

City of Westlake Fiscal Year 2025 Budget

General Fund – Source of Funds

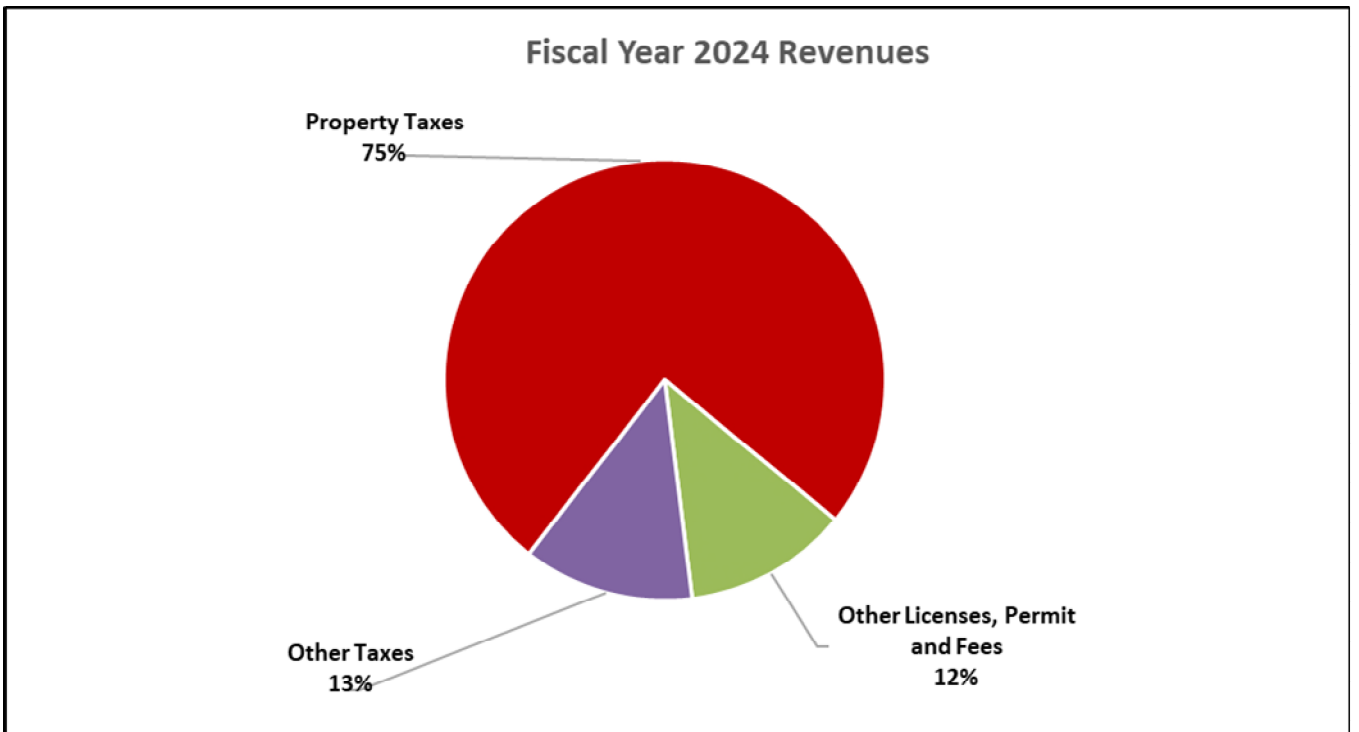
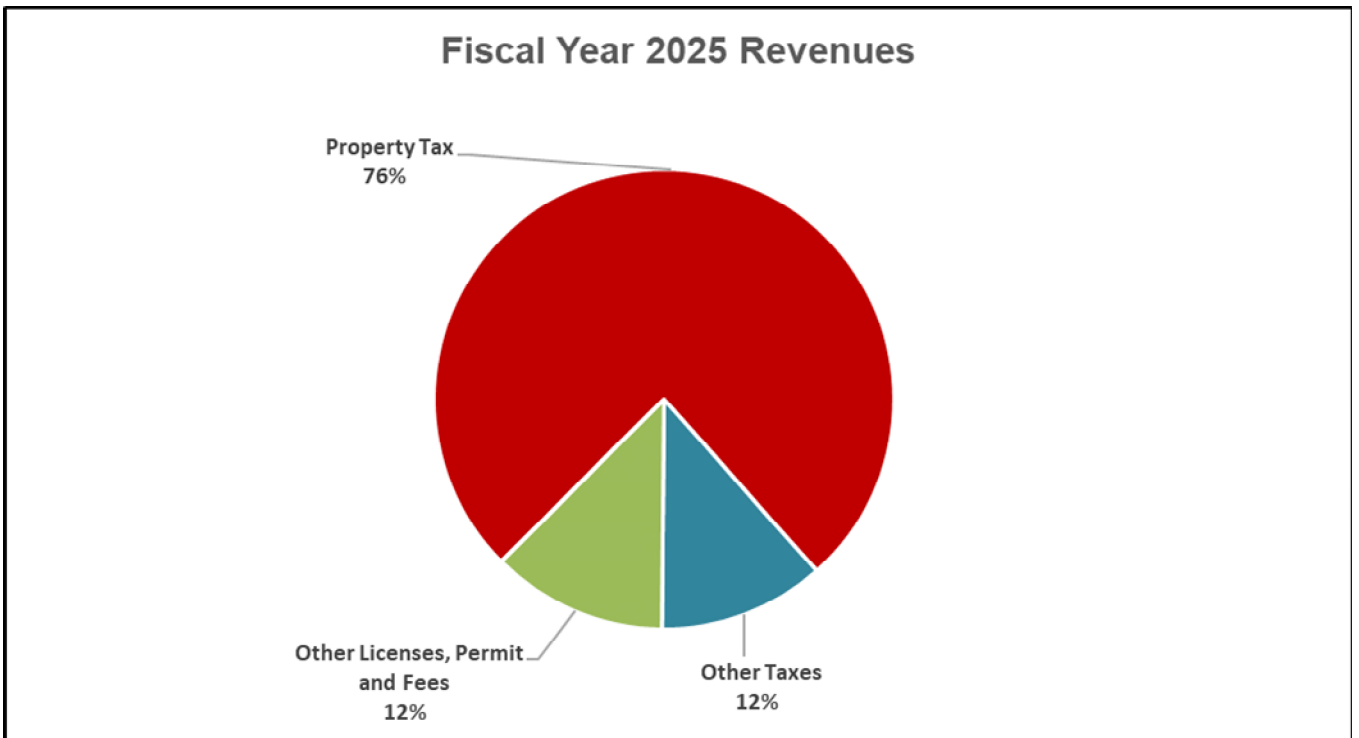
Description	FY 2024			FY 2025		
	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./(Decr.) Over Budget	% Budget Incr./(Decr.)
Property Taxes	\$ 5,011,896	\$ 4,916,411	\$ (95,485)	\$ 6,891,200	\$ 1,879,304	37.5%
Other Taxes	834,100	967,719	133,619	1,061,400	227,300	27.3%
Other Licenses, Permit and Fees	802,700	1,139,228	336,528	1,121,300	318,600	39.7%
Interest Income	-	206,701	206,701	-	-	NA
Total Revenues	\$ 6,648,696	\$ 7,230,059	\$ 581,363	\$ 9,073,900	\$ 2,425,204	36.5%
Use (Add To) Fund Balance	(1,099,796)	(3,347,396)	(2,247,600)	(1,728,400)	(628,604)	57.2%
Total Source of Funds	\$ 5,548,900	\$ 3,882,663	\$ (1,666,237)	\$ 7,345,500	\$ 1,796,600	32.4%

FY2024 Revenues vs. FY2025 Revenues



City of Westlake Fiscal Year 2025 Budget

General Fund – Source of Funds



**City of Westlake
Fiscal Year 2025 Budget**

General Fund – Revenue Detail

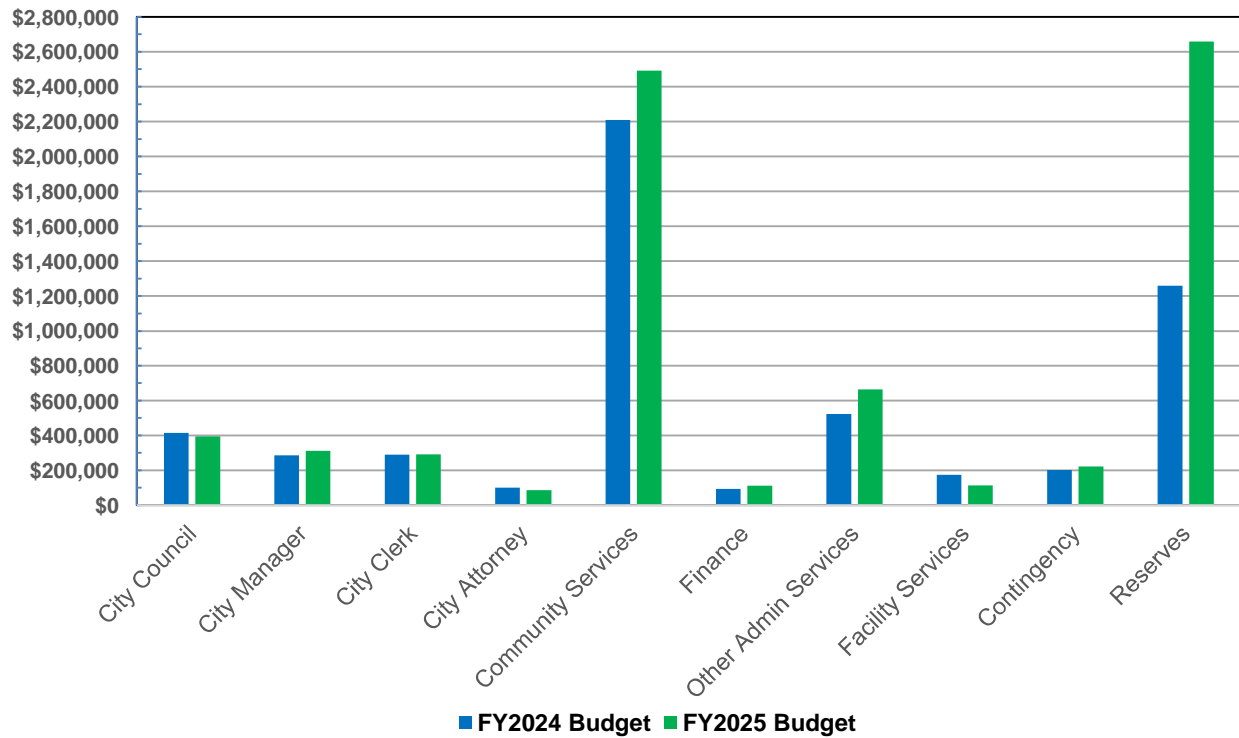
Description	FY 2022	FY 2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./ (Decr.) Over Budget	% Budget Incr./ (Decr.)
Property Tax								
Tax Receipts - Current Year	\$ 1,796,354	\$ 3,099,718	\$ 4,721,257	\$ 4,611,297	\$ (109,960)	\$ 6,417,200	\$ 1,695,943	35.9%
Tax Receipts - Prior Years	-	1,308	-	1,894	1,894	-	-	NA
Tax Receipts - Discounts	(69,673)	(119,809)	(188,850)	(179,232)	9,618	(256,700)	(67,900)	35.9%
Special Assessments-Tax Collector	223,216	357,057	499,468	501,477	2,009.00	761,100	261,632	52.4%
Special Assessments-Delinquent	-	281	-	281	281	-	-	NA
Special Assmnts- Discounts	(8,498)	(13,026)	(19,979)	(19,306)	673	(30,400)	(10,421)	52.2%
Total - Property Tax	\$ 1,941,399	\$ 3,325,529	\$ 5,011,896	\$ 4,916,411	\$ (95,485)	\$ 6,891,200	\$ 1,879,254	37.5%
Other Taxes								
Municipal Revenue Sharing	\$ 15,822	\$ 28,123	\$ 43,200	\$ 43,145	\$ (55)	\$ 43,200	\$ -	0.0%
Public Service Tax-Electricity	243,889	408,914	430,600	485,769	55,169	550,500	119,900	27.8%
Public Service Tax-Water	68,332	75,926	109,000	170,046	61,046	192,700	83,700	76.8%
Public Service Tax-Gas	62,315	100,430	102,900	126,605	23,705	126,600	23,700	23.0%
Communications Svcs. Tax	47,770	122,167	148,400	142,154	(6,246)	148,400	-	0.0%
Total - Other Taxes	\$ 438,128	\$ 735,560	\$ 834,100	\$ 967,719	\$ 133,619	\$ 1,061,400	\$ 227,300	27.3%
Other Licenses, Permits and Fees								
Fees								
FPL Franchise Fee	\$ 215,079	\$ 331,283	\$ 365,200	\$ 406,580	\$ 41,380	\$ 460,800	\$ 95,600	26.2%
Gas Franchise Fee	-	44,050	60,100	280,425	220,325	280,400	220,300	4
Solid Waste Franchise Fee	13,373	19,520	22,200	25,579	3,379	29,000	6,800	30.6%
Occupational Licenses	27,536	51,612	6,100	12,561	6,461	12,600	6,500	106.6%
Solid Waste Disposal Fees	266,233	233,430	228,900	233,430	4,530	233,400	4,500	2.0%
Penalties	13,000	-	-	-	-	-	-	NA
County Impact Fee Admin. Fees	100,006	94,445	95,700	76,596	(19,104)	76,600	(19,100)	-20.0%
Lien Search Fees	10,023	12,968	5,900	12,113	6,213	10,000	4,100	69.5%
Trash Bin Fees	13,215	15,720	13,200	11,952	(1,248)	12,000	(1,200)	-9.1%
Federal Grants	362,367	1,132	-	-	-	-	-	NA
Special Events	79,450	71,300	-	62,050	62,050	-	-	NA
Other Fees	9,518	12,688	5,400	17,942	12,542	6,500	1,100	20.4%
Total - Other Licenses, Permits and Fees	\$ 1,109,800	\$ 888,148	\$ 802,700	\$ 1,139,228	\$ 336,528	\$ 1,121,300	\$ 318,600	39.7%
Interest Income	\$ 7,702	\$ 54,788	\$ -	\$ 206,701	\$ 206,701	\$ -	\$ -	NA
Total Revenue	\$ 3,497,029	\$ 5,004,025	\$ 6,648,696	\$ 7,230,059	\$ 581,363	\$ 9,073,900	\$ 2,425,154	36.5%
Total Fund Bal. Use / (Addition)	\$ (636,121)	\$ (1,658,180)	\$ (1,099,796)	\$ (3,347,396)	\$ (2,247,600)	\$ (1,728,400)	\$ (628,604)	57.2%
Total Funding	\$ 2,860,908	\$ 3,345,845	\$ 5,548,900	\$ 3,882,663	\$ (1,666,237)	\$ 7,345,500	\$ 1,796,550	32.4%

City of Westlake Fiscal Year 2025 Budget

General Fund – Expenditures by Function

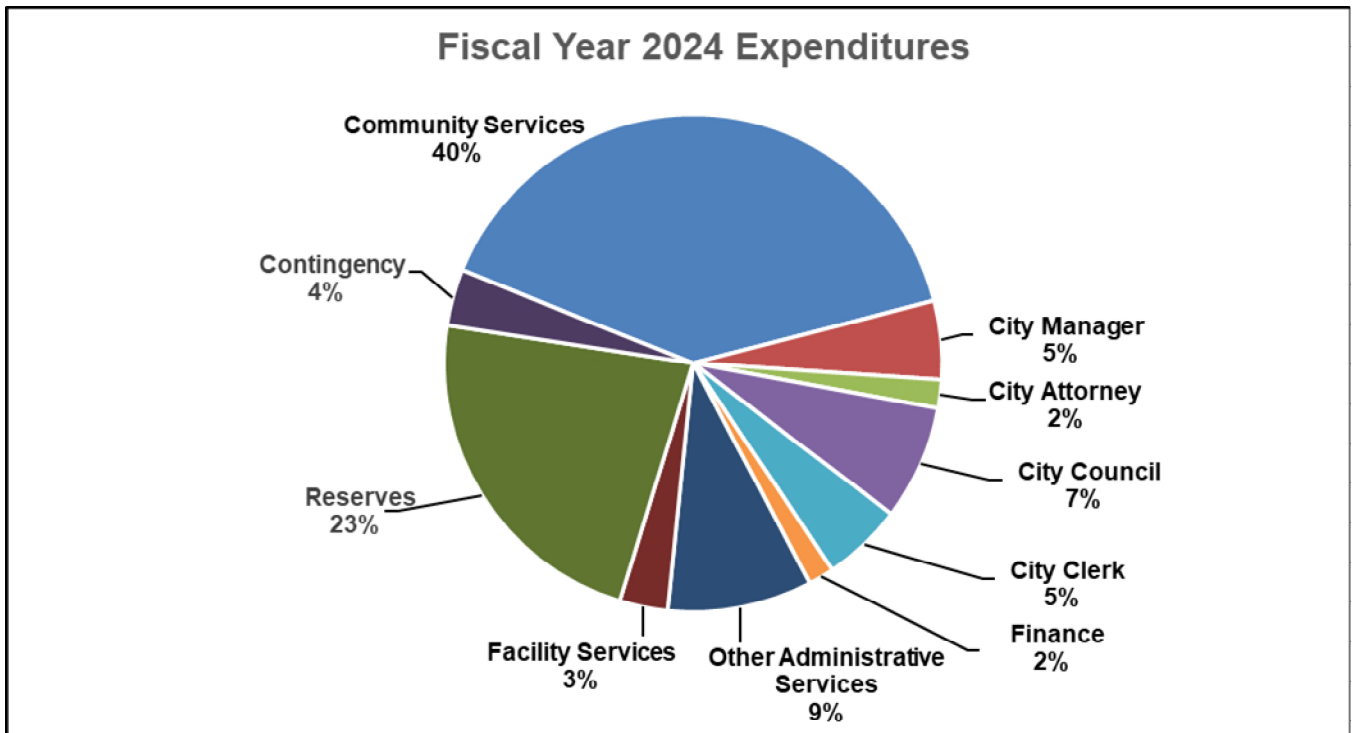
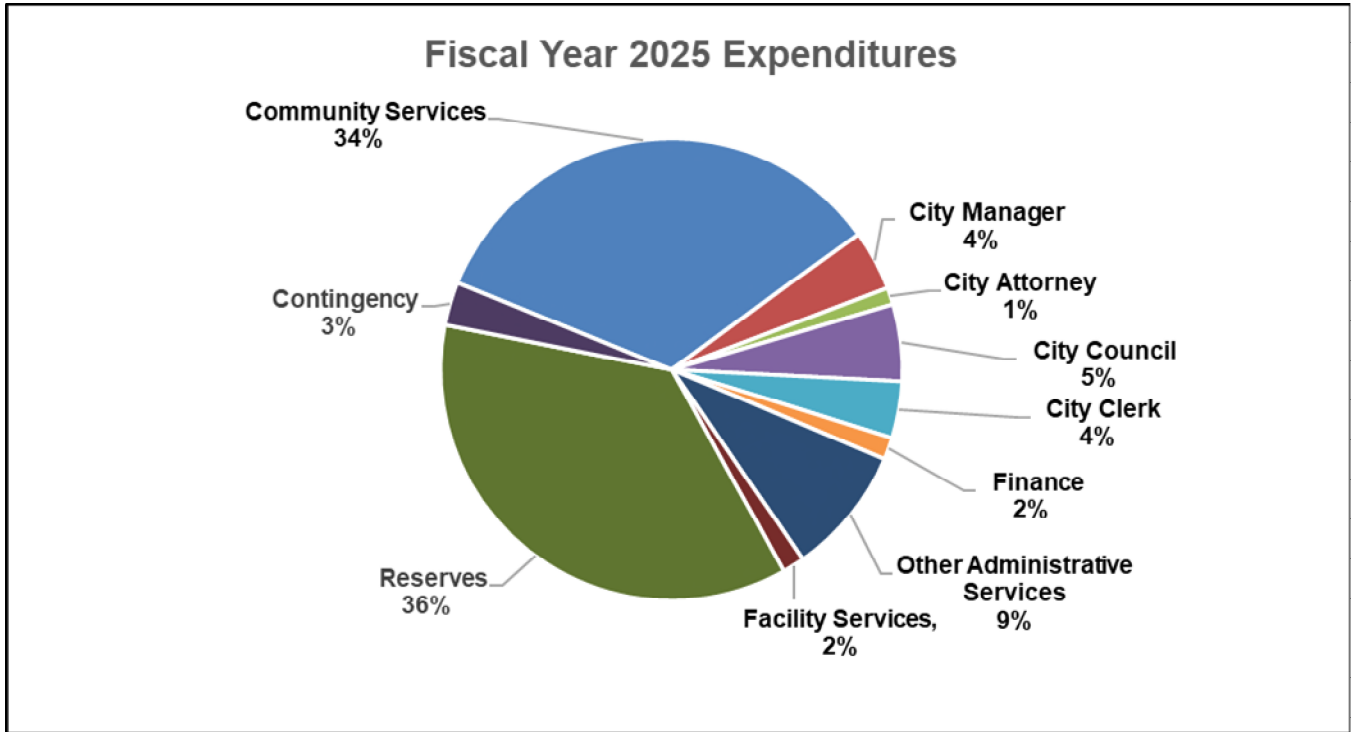
Description	FY 2024			FY 2025		
	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./ (Decr.) Over Budget	% Budget Incr./ (Decr.)
City Council	\$ 414,200	\$ 370,177	\$ 44,023	\$ 394,900	\$ (19,300)	-4.7%
City Manager	285,200	280,707	4,493	312,100	26,900	9.4%
City Clerk	288,800	257,382	31,418	292,100	3,300.00	1.1%
City Attorney	101,400	81,806	19,594	86,800	(14,600)	-14.4%
Community Services	2,209,000	2,298,192	(89,192)	2,490,900	281,900	12.8%
Finance (Other Depts)	92,600	100,737	(8,137)	112,200	19,600	21.2%
Other Administrative Services (Other Depts)	522,200	394,937	127,263	663,300	141,100	27.0%
Facility Services (Other Depts)	173,800	84,840	88,960	113,300	(60,500)	-34.8%
Contingency (Other Depts)	201,900	13,885	188,015	220,800	18,900	9.4%
Reserves (Other Depts)	1,259,800	-	1,259,800	2,659,100	1,399,300	111.1%
Total Expenditures	\$ 5,548,900	\$ 3,882,663	\$ 1,666,237	\$ 7,345,500	\$ 1,796,600	32.4%

FY2024 Expenditures vs. FY2025 Expenditures



City of Westlake Fiscal Year 2025 Budget

General Fund – Expenditures by Function



City of Westlake Fiscal Year 2025 Budget

General Fund – City Council Department

Mission

To serve as the legislative body in accordance with the Charter and applicable statutes. The form of government is a Council/Manager. The City council shall conduct regular meetings, special meetings, adopt codes and ordinances and approve the annual budget by September 30th each year by resolution.

Last Year Highlights

- Held Various events within the City (Eats & Beats, Safety Awareness Day, Spring fest, Holiday Pop-up Market and the second annual Fourth Fest)
- Approved seven plats for future development.
- Approved revisions and updated to various ordinances and Land Development Regulations.
- Conducted annual budget workshop with the City Manager and staff.

Current Year Goals

- Continue to communicate appropriate information to residents regarding the growth of the city.
- Continue to update sections of the City's Land Development regulations to address unforeseen conflicts.
- Approve additional plats as presented by staff.
- Approve nonresidential site plans for developments in conformance with the City's Land Development Regulations (LDRs).

Description	FY2022	FY2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./(Decr.) Over Budget	% Budget Incr.(Decr.)
Personal Services								
Mayor/Council Stipend	\$ 94,443	\$ 60,000	\$ 60,000	\$ 60,000	\$ -	\$ 60,000	\$ -	0.0%
FICA	7,225	4,590	4,600	4,560	40	4,600	-	0.0%
Total Personal Services	\$ 101,668	\$ 64,590	\$ 64,600	\$ 64,560	\$ 40	\$ 64,600	\$ -	0.0%
Operating Expenses								
ProfServ-Legislative Expense	\$ -	\$ -	\$ 24,000	\$ -	\$ 24,000	\$ 24,000	\$ -	0.0%
Telephone, Cable and Internet Service	1,131	3,916	3,800	5,407	(1,607)	5,400	1,600	42.1%
Lease - Building	-	-	16,000	7,500	8,500	7,500	(8,500)	-53.1%
Public Officials Insurance	3,125	3,500	4,200	4,557	(357)	5,500	1,300	31.0%
City Events	169,742	211,992	250,000	211,992	38,008	212,000	(38,000)	-15.2%
Election Fees	600	-	-	240	(240)	-	-	N/A
Council Expenses	26,237	33,174	50,000	72,579	(22,579)	72,600	22,600	45.2%
Dues, Licenses, Subscriptions	1,529	1,273	1,600	3,342	(1,742)	3,300	1,700	106.3%
Total Operating Expenses	\$ 202,364	\$ 253,855	\$ 349,600	\$ 305,617	\$ 43,983	\$ 330,300	\$ (13,700)	-5.5%
Total City Council	\$ 304,032	\$ 318,445	\$ 414,200	\$ 370,177	\$ 44,023	\$ 394,900	\$ (13,700)	-4.7%

City of Westlake Fiscal Year 2025 Budget

General Fund – City Manager Department

Mission

To implement the policies and direction of the City Council, serve the residents of the community by fulfilling duties as the legislative body directs through developing policies designed to successfully perform municipal functions and render other municipal services.

Last Year Highlights

- Continued to hold monthly “Coffee with the Manager” on-line discussions with the residents.
- Ensured that development complied with the comprehensive master plan and current LDRs.
- Made considerable progress toward implementation of a building department software system. Projected operation mid-October.
- Made progress with the development of the major park with Seminole Improvement District.
- Secured an agreement with the master HOA for utilization of the Lodge building for council meetings.

Current Year Goals

- Continue monthly “Coffee with the Manager” to keep residents informed what is happening within the City.
- Continue to work on facilities planning (Community Center, Park etc.).
- Review and update LDR’s as necessary to minimize or eliminate conflicts.
- Complete codification of the LDR ordinances in Municode.
- Review new commercial and residential plats as submitted for future development to minimize conflicts with developers and the Seminole Improvement District.
- Review and draft contracts for additional services as needed.

Description	FY2022	FY2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./(Decr.) Over Budget	% Budget Incr./(Decr.)
Operating Expenses								
Contracts - City Manager	\$ 207,404	\$ 213,600	\$ 220,000	\$ 230,678	\$ (10,678)	\$ 249,800	\$ 29,800	13.5%
Office Supplies	6,990	11,343	12,300	9,551	2,749	9,600	(2,700)	-22.0%
Dues, Licenses, Subscriptions	2,870	1,924	2,900	2,717	183	2,700	(200)	-6.9%
Total Operating Expenses	\$ 217,264	\$ 226,867	\$ 235,200	\$ 242,946	\$ (7,746)	\$ 262,100	\$ 26,900	11.4%
Capital Expenses								
Capital Outlay	1,855	6,378	50,000	37,761	12,239	50,000	-	0.0%
Total Capital Expenses	\$ 1,855	\$ 6,378	\$ 50,000	\$ 37,761	\$ 12,239	\$ 50,000	\$ -	0.0%
Total City Manager	\$ 219,119	\$ 233,245	\$ 285,200	\$ 280,707	\$ 4,493	\$ 312,100	\$ 26,900	9.4%

City of Westlake Fiscal Year 2025 Budget

General Fund – City Clerk Department

Mission

To establish confidence and trust in municipal government while providing efficient, effective, and transparent public service to the Council, departments, and citizens of Westlake, and to safeguard accurate records of municipal activities in accordance with applicable federal, state, and local laws. The City Clerk shall:

- Prepare and publish meeting notices, including legally required advertisements, and prepare and distribute agenda packets in advance of regular, special, workshop meetings and public hearings.
- Provide clerical support to the Council.
- Draft and publish meeting notices and prepare and distribute agenda packets in advance of Board Meetings.
- Coordinate recruitment of Advisory Board applicants.
- Maintain the City's official records, provide information and records to the public and staff, maintain data related to legislative history, and update the City Charter and City Code.
- Coordinate and manage municipal elections and serve as the filing clerk.
- Draft and disseminate public information notices through various modes of communication.
- Oversee website updates, site navigation, and ensure accessibility and accuracy of documents.

Last Year Highlights

- Assisted in the planning and organization of four (5) city events.
- Initiated the restructuring of current records management system to improve storage, retention, and disposition.
- Continued efforts to progress the city through codification.
- Continued to improve resident communication on the city website and city social media.
- Continued to modify and oversee systems for public meeting notification, publication and virtual meeting broadcasting.
- Continued to develop standard operating procedures.

Current Year Goals

- Oversee the completion of the City's codification process.
- Continue to enhance and promote accessibility and to provide services in an open and transparent manner.
- Continue to maintain and seek strong cooperative partnerships, relationships, and opportunities to improve services, and to meet the changing needs of the community, including the rapidly increasing size and diversity of its population.
- Continue to develop records management policies and procedures in accordance with State guidelines.
- Review and streamline election processes in anticipation of 2024 election.

City of Westlake Fiscal Year 2025 Budget

General Fund – City Clerk Department

- Maintain business licensing, and other permitting processes.
- Continue to pursue municipal clerk education opportunities.
- Maintain relationships with local and state municipal clerk associations.
- Evaluate, digitize, and dispose of records per Florida Statute.

Description	FY2022	FY2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr.(Decr.) Over Budget	% Budget Incr./.(Decr.)
Operating Expenses								
Website Support	\$ 8,256	\$ 6,100	\$ 6,100	\$ 8,324	\$ (2,224)	\$ 8,300	\$ 2,200	36.1%
Contracts-City Clerk	206,000	212,200	218,600	218,600	-	226,300	7,700	3.5%
Postage and Freight	931	779	1,500	806	694	-	(1,500)	-100.0%
Printing	3,088	21	15,500	11	15,489	15,500	-	0.0%
Advertising	14,670	17,543	23,200	7,148	16,052	17,500	(5,700)	-24.6%
Office Supplies	-	2,885	2,900	-	2,900	2,900	-	0.0%
Miscellaneous Services	193	100	1,300	404	896	-	(1,300)	-100.0%
Miscellaneous Expenses	-	-	-	545	(545)	-	-	NA
Dues, Licenses, Subscriptions	10,340	20,063	19,700	21,544	(1,844)	21,600	1,900	9.6%
Total City Clerk	\$ 243,478	\$ 259,691	\$ 288,800	\$ 257,382	\$ 31,418	\$ 292,100	\$ 3,300	1.1%

City of Westlake Fiscal Year 2025 Budget

General Fund – City Attorney

Mission

To provide efficient, effective, and competent legal advice to the City Council, the City Manager and all departments on legal matters and their impacts on the City of Westlake, including legislative and statutory changes. The City Attorney works in concert with the City Manager and staff drafting ordinances and resolutions to implement policy decisions made by the City Council.

Last Year Highlights

- Worked with the City Manager, Planning & Zoning and Engineering in drafting of and revising the current Land Development Regulations.
- Reviewed and approved the plat language and bonds on new plats for development.
- Reviewed mortgage documents for housing assistance awarded this year.
- Monitored the legislature for potential impacts on the City.
- Advised City Council on plats and LDRs.
- Reviewed agenda items in Municode and drafted necessary ordinances and resolutions.
- Reviewed legal ads drafted by staff.
- Attended regular City Council meetings and Local Planning Agency meetings.
- Enlisted the services of a Special Magistrate and prepared code enforcement documents/forms for the City.
- Assisted with solid waste assessment (draft resolutions and public notices).

Current Year Goals

- Work with the City Manager and staff in reviewing and updating the City’s Land Development regulations.
- Continue to provide legal review for the Housing Assistance program to the City Manager and staff.
- Review plat language for consistency with the City’s interests.
- Provide legal advice and reviews as needed and directed by the City Council.

Description	FY2022	FY2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./ (Decr.) Over Budget	% Budget Incr./ (Decr.)
Operating Expenditures								
ProfServ-Legal Services	\$ 86,790	\$ 71,202	\$ 101,400	\$ 81,806	\$ 19,594	\$ 86,800	\$ (14,600)	-14.4%
Total City Attorney	\$ 86,790	\$ 71,202	\$ 101,400	\$ 81,806	\$ 19,594	\$ 86,800	\$ (14,600)	-14.4%

City of Westlake Fiscal Year 2025 Budget

General Fund – Community Services Department

Summary

The Community Services Department consists of solid waste collection, law enforcement, electricity, roadway services and community service functions.

Solid Waste Collection – Costs related to the collection and disposal of resident solid waste are accounted for in the Community Service Department

Law Enforcement - The current contract with the Palm Beach County Sheriff’s department calls for one 24/7 deputy. To accomplish this coverage, seven deputies are required. The contract includes dedicated officers, vehicles, and dispatch. The contract also includes the supervisory personnel, K-9, detectives, crime lab, SWAT, and other resource necessary for the safety of the residents.

Electricity – Expenditures to provide electricity for roadway lighting and traffic control are accounted for in the Community Service Department.

Community Service – Expenditures for personnel performing community-wide maintenance are accounted for in the Community Service Department, along with the cost to purchase trash collection bins and other necessary maintenance supplies.

Roadway Services – Expenditures for operation and maintenance of traffic signals are accounted for in the Community Services Department.

Description	FY2022	FY2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./(Decr.) Over Budget	% Budget Incr./(Decr.)
Operating Expenditures								
Contracts-Solid Waste	\$ 484,391	\$ 810,480	\$ 926,300	\$ 1,039,097	\$ (112,797)	\$ 1,177,600	\$ 251,300	27.1%
Contracts-Sheriff	650,002	859,790	1,025,600	1,025,583	17	1,066,600	41,000	4.0%
Electricity-Streetlighting	113,725	125,574	142,700	117,132	25,568	129,300	(13,400)	-9.4%
R&M-Community Service	27,500	28,300	29,100	29,100	-	30,100	1,000	3.4%
Operating Supplies	30,815	57,280	57,300	57,280	20	57,300	-	0.0%
Roadway Services	-	25,510	28,000	30,000	(2,000)	30,000	2,000	NA
Total Community Services	\$ 1,306,433	\$ 1,906,934	\$ 2,209,000	\$ 2,298,192	\$ (89,192)	\$ 2,490,900	\$ 281,900	12.8%

**City of Westlake
Fiscal Year 2025 Budget**

General Fund – Other Departments

Description	FY2022	FY2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./ (Decr.) Over Budget	% Budget Incr./ (Decr.)
Finance								
Auditing Services	\$ 5,250	\$ 7,000	\$ 7,000	\$ 7,500	\$ (500)	\$ 7,800	\$ 800	11.4%
Contracts - Finance	80,668	83,100	85,600	93,237	(7,637)	104,400	18,800	22.0%
Total Finance	\$ 85,918	\$ 90,100	\$ 92,600	\$ 100,737	\$ (8,137)	\$ 112,200	\$ 19,600	21.2%
Other Administrative Services								
ProfServ-Information Technology	\$ 220,124	\$ 84,623	\$ 81,100	\$ 71,633	\$ 9,467	\$ 71,600	(9,500)	-11.7%
Contracts-Admin. Service	199,239	277,757	286,100	308,187	(22,087)	434,100	148,000	51.7%
Misc-Assessmnt Collection Cost	877	1,288	5,000	4,376	624	7,600	2,600	52.0%
Misc-Public Relations	24,100	-	-	-	-	-	-	NA
General Government	65,906	77	150,000	10,741	139,259	150,000	-	0.0%
Total Other Administrative Services	\$ 510,246	\$ 363,745	\$ 522,200	\$ 394,937	\$ 127,263	\$ 663,300	\$ 141,100	27.0%
Facility Services								
Telephone, Cable and Internet Service	\$ 14,647	\$ 15,861	\$ 16,200	\$ 13,332	\$ 2,868	\$ 13,300	\$ (2,900)	-17.9%
Lease - Building	500	-	86,700	-	86,700	25,000	(61,700)	-71.2%
Lease-Copier	4,480	9,105	12,500	12,823	(323)	12,900	400	3.2%
Insurance(Liab,Auto,Property)	5,745	6,781	8,100	11,017	(2,917)	13,200	5,100	63.0%
Miscellaneous Services	1,682	1,547	1,700	523	1,177	1,700	-	0.0%
Cleaning Services	25,965	25,545	26,000	18,956	7,044	26,000	-	0.0%
Principal-Capital Lease Payments	16,450	21,905	18,200	22,746	(4,546)	19,100	900	4.9%
Interest-Capital Lease Payments	2,495	5,967	4,400	5,443	(1,043)	2,100	(2,300)	-52.3%
Total Facility Services	\$ 71,964	\$ 86,711	\$ 173,800	\$ 84,840	\$ 88,960	\$ 113,300	\$ (60,500)	-34.8%
Contingency	\$ 32,928	\$ 15,772	\$ 201,900	\$ 13,885	\$ 188,015	\$ 220,800	\$ 18,900	9.4%
Reserves								
1st Quarter Operating	\$ -	\$ -	\$ 1,059,800	\$ -	\$ 1,059,800	\$ 1,159,100	\$ 99,300	9.4%
Capital Projects	-	-	200,000	-	200,000	1,500,000	1,300,000	650.0%
Total Reserves	\$ -	\$ -	\$ 1,259,800	\$ -	\$ 1,259,800	\$ 2,659,100	\$ 1,399,300	111.1%
Total Other Departments	\$ 701,056	\$ 556,328	\$ 2,250,300	\$ 594,399	\$ 1,655,901	\$ 3,768,700	\$ 1,518,400	67.5%



Special Revenue Funds

**City of Westlake
Fiscal Year 2025 Budget**

Special Revenue Fund Summary

Description	FY 2024			FY 2025		
	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./(Decr.) Over Budget	% Budget Incr./(Decr.)
<u>FUNDING</u>						
Revenue/Other Financing Sources	\$ 3,382,600	\$ 2,526,728	\$ (855,873)	\$ 3,011,500	\$ (371,100)	-11.0%
Total Fund Bal. Use / (Addition)	-	(135,968)	(135,968)	-	-	NA
Total Funding	\$ 3,382,600	\$ 2,390,760	\$ (991,840)	\$ 3,011,500	\$ (371,100)	-11.0%
<u>EXPENDITURES</u>						
Expenditures	3,382,600	2,390,760	(991,840)	3,011,500	(371,100)	-11.0%
Total Expenditures	\$ 3,382,600	\$ 2,390,760	\$ 991,840	\$ 3,011,500	\$ (371,100)	-11.0%

**City of Westlake
Fiscal Year 2025 Budget**

Special Revenue Fund Detail-Comprehensive Planning Services

Description	FY2022	FY2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./(Decr.) Over Budget	% Budget Incr./(Decr.)
Revenue								
Building Permits	\$ 1,720,241	\$ 1,079,748	\$ 2,329,000	\$ 1,014,060	\$ (1,314,940)	\$ 1,950,100	\$ (378,900)	-16.3%
Reinspection Fees	4,800	5,550	4,800	525	(4,275)	-	(4,800)	-100.0%
Building Permits-Surcharge	6,555	8,176	4,200	6,456	2,256	7,700	3,500	83.3%
Other Building Permit Fees	80,850	121,950	30,000	86,450	56,450	30,000	-	0.0%
Building Permits-Admin Fee	141,555	133,645	90,900	119,150	28,250	119,100	28,200	31.0%
Engineering Permits	401,084	337,228	330,500	63,746	(266,755)	300,600	(29,900)	-9.0%
Planning/Zoning Permits	39,039	51,195	293,200	304,014	10,814	304,000	10,800	3.7%
Other Miscellaneous Revenue	-	1,000	-	-	-	-	-	NA
Total Revenue	\$ 2,394,124	\$ 1,738,492	\$ 3,082,600	\$ 1,594,400	\$ (1,488,201)	\$ 2,711,500	\$ (371,100)	-12.0%
Expenditures								
ProfServ-Engineering	\$ 300,555	\$ 261,205	\$ 308,500	\$ 164,619	\$ 143,881	\$ 300,600	\$ (7,900)	-2.6%
ProfServ-Information Technology	132,181	259,149	200,800	247,030	(46,230)	259,100	58,300	29.0%
ProfServ-Legal Services	62,703	42,292	75,300	26,835	48,465	62,700	(12,600)	-16.7%
ProfServ-Planning/Zoning Board	275,083	284,853	293,200	304,014	(10,814)	304,000	10,800	3.7%
ProfServ-Compliance Service	-	186,480	185,800	178,200	7,600	186,500	700	0.4%
ProfServ-Consultants	-	-	22,000	-	22,000	-	(22,000)	-100.0%
ProfServ-Building Permits	1,431,911	1,738,822	1,796,000	1,267,524	528,476	1,431,900	(364,100)	-20.3%
Outside Legal Services	875	-	1,800	-	1,800	900	(900)	-50.0%
Telephone, Cable and Internet Service	4,756	5,036	5,300	5,285	15	5,300	-	0.0%
Lease - Building	-	-	43,400	-	43,400	24,000	(19,400)	-44.7%
Lease - Copier	3,538	5,860	6,800	4,323	2,477	3,100	(3,700)	-54.4%
Printing	993	255	2,200	713	1,487	1,000	(1,200)	-54.5%
Miscellaneous Services	1,308	345	1,300.00	370	930	1,300	-	0.0%
Administration Fee	113,218	113,200	116,600	74,111	42,489	32,700	(83,900)	-72.0%
Billing Service Fees	-	-	-	46,189	(46,189)	74,400	74,400	NA
Office Supplies	5,206	518	2,100	445	1,655	2,100	-	0.0%
Cleaning Services	15,900	16,550	15,900	19,688	(3,788)	16,600	700	4.4%
Principal-Capital Lease Payments	1,865	-	4,500	-	4,500	4,800	300	6.7%
Interest-Capital Lease Payments	183	-	1,100	-	1,100	500	(600)	-54.5%
Total Expenditures	\$ 2,350,275	\$ 2,914,565	\$ 3,082,600	\$ 2,339,346	\$ 743,254	\$ 2,711,500	\$ (371,100)	-12.0%

**City of Westlake
Fiscal Year 2025 Budget**

Special Revenue Fund Detail-Housing Assistance

Description	FY2022	FY2023	FY 2024			FY 2025		
	Actual	Actual	Adopted Budget	Forecast	Fav / (Unfav)	Budget	Incr./(Decr.) Over Budget	% Budget Incr./(Decr.)
Revenue								
Interest-Investments	\$ 10,365	\$ 126,526	\$ -	\$ 151,929	\$ 151,929	\$ -	\$ -	NA
Dividends	-	-	-	53,649	(53,649)	-	-	NA
Donations	1,001,028	807,660	300,000	726,750	426,750	300,000	-	0.0%
Total Revenue	\$ 1,011,393	\$ 934,186	\$ 300,000	\$ 932,328	\$ 525,030	\$ 300,000	\$ -	0.0%
Expenditures								
Assistance Program	\$ 39,425	\$ 55,925	\$ 279,000	\$ 47,424	\$ 231,576	\$ 279,000	\$ -	0.0%
Administration Fee	13,706	14,504	21,000	3,990	17,010	21,000	-	0.0%
Bank Charges	115	-	-	-	-	-	-	NA
Total Expenditures	\$ 53,246	\$ 70,429	\$ 300,000	\$ 51,414	\$ 248,586	\$ 300,000	\$ -	0.0%
Other Financing Sources (Uses)								
Interest Income	12	-	-	-	-	-	-	NA
Total Other Sources (Uses)	\$ 12	-	-	-	-	-	-	NA

File Attachments for Item:

B. RESOLUTION 2024-13 - Levying the Annual Special Assessment for Residential Solid Waste Services for Fiscal Year 2024-25

Submitted By: Administration

RESOLUTION NO. 2024-13

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, RELATING TO THE PROVISION OF RESIDENTIAL SOLID WASTE SERVICES IN THE CITY OF WESTLAKE, FLORIDA; PROVIDING FOR PURPOSE AND DEFINITIONS; PROVIDING FOR LEGISLATIVE DETERMINATIONS; ESTABLISHING THE ESTIMATED RATE FOR THE RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENT FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024; DIRECTING THE PREPARATION OF A RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENT ROLL; AUTHORIZING A PUBLIC HEARING AND DIRECTING THE PROVISION OF NOTICE THEREOF; AND PROVIDING AN EFFECTIVE DATE.



Meeting Agenda Item Coversheet

MEETING DATE:		July 2, 2024	Submitted By: Administration	
SUBJECT: <i>This will be the name of the Item as it will appear on the Agenda</i>		Resolution 2024-13 Levying the Annual Special Assessment for Residential Solid Waste Services for Fiscal Year 2024-25		
STAFF RECOMMENDATION: (MOTION READY)		Motion to approve Resolution 2024- Levying the Annual Special Assessment for Residential Solid Waste Services for Fiscal Year 2024-25		
SUMMARY and/or JUSTIFICATION:		<p>The City currently provides residential solid waste services within the City through an agreement entered into on July 22, 2019 with Advanced Disposal Services/Solid Waste Southeast, Inc. The City commenced collecting funds for the costs for such services by levying an annual special assessment against residential property to be collected on the tax bill in Fiscal Year 2021-22, in lieu of direct (quarterly, monthly) billing.</p> <p>The proposed resolution, through provisions identified in Ordinance 2021-02, constitutes the Preliminary Assessment Resolution which levies a Residential Solid Waste Services Non-Ad Valorem Special Assessment for the Fiscal Year beginning October 1, 2024, and provides for a noticed public hearing to adopt the special assessment on September 3, 2024.</p>		
SELECT, if applicable	AGREEMENT:		BUDGET:	
	STAFF REPORT:		PROCLAMATION:	
	EXHIBIT(S):		OTHER:	X
IDENTIFY EACH ATTACHMENT. <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i>	Resolution 2024-13 Appendix A – Estimated Residential Solid Waste Services Assessment Rate Schedule Appendix B – Form of Notice to be Published Appendix – C – Form of Mailed Notice			
SELECT, if applicable	RESOLUTION:	X	ORDINANCE:	
IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE <i>(if Item is <u>not</u> a Resolution or Ordinance, please erase all default text from this field's textbox and leave blank)</i> <u>Please keep text indented.</u>	RESOLUTION 2024- 13 A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, RELATING TO THE PROVISION OF RESIDENTIAL SOLID WASTE SERVICES IN THE CITY OF WESTLAKE, FLORIDA; PROVIDING FOR PURPOSE AND DEFINITIONS; PROVIDING FOR LEGISLATIVE DETERMINATIONS; ESTABLISHING THE ESTIMATED RATE FOR THE RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENT FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024; DIRECTING THE PREPARATION OF A RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENT ROLL; AUTHORIZING A PUBLIC HEARING AND DIRECTING THE PROVISION OF NOTICE THEREOF; AND PROVIDING AN EFFECTIVE			

	DATE.	
FISCAL IMPACT <i>(if any):</i>		\$

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42
43
44
45
46
47
48

CITY OF WESTLAKE

RESOLUTION NO. 2024-13

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, RELATING TO THE PROVISION OF RESIDENTIAL SOLID WASTE SERVICES IN THE CITY OF WESTLAKE, FLORIDA; PROVIDING FOR PURPOSE AND DEFINITIONS; PROVIDING FOR LEGISLATIVE DETERMINATIONS; ESTABLISHING THE ESTIMATED RATE FOR THE RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENT FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024; DIRECTING THE PREPARATION OF A RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENT ROLL; AUTHORIZING A PUBLIC HEARING AND DIRECTING THE PROVISION OF NOTICE THEREOF; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, City of Westlake Ordinance No. 2021-02, as adopted, provides the authority for the City to impose Residential Solid Waste Services Special Assessments against Residential property located within the City, and provides findings of special benefit to Residential property as a result of such services; and,

WHEREAS, the City has in place an Agreement with Advanced Disposal Services/Solid Waste Southeast, Inc., dated July 22, 2019 (hereinafter the “Contract”), pursuant to which the City provides Residential Solid Waste Services to, among others, all residential properties that receive Residential Solid Waste Services within the City; and,

WHEREAS, the City believes it is in the best interests of the residents and residential properties owners to collect funds for the costs of the City’s Residential Solid Waste Services to all residential units that receive Residential Solid Waste Services by the City, through its Contract, through the levy and collection of a special assessment, as such will eliminate direct quarterly or monthly billing and charges to residents, permit the payment for the services on an annual basis along with property taxes and other special assessments, reduce the administrative costs of the Residential Solid Waste Collection Program to the City, and ensure that all properties that receive Residential Solid Waste Services from the City through the Contract pay for such so that no property is over-charged by virtue of the failure of other properties to pay for such; and,

WHEREAS, Residential Solid Waste Services provided by the City through its Contract as defined hereinafter provide the requisite special benefit to Assessed Property such that they may be funded through a special assessment; and,

WHEREAS, City Administration has reviewed the budget for Residential Solid Waste Services, for residential units that receive Residential Solid Waste Services by the City through the Contract, to ensure that the Residential Solid Waste Services Special Assessment meets the legal requirements for special benefit and fair apportionment; and,

WHEREAS, the City Council determines that it is fair and equitable to levy and collect a non-ad valorem special assessment to fund the Residential Solid Waste Services provided by the City through its Contract, consistent with the methodology and allocation as provided hereinafter.

1 **NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE**
2 **CITY OF WESTLAKE, FLORIDA:**

3
4 **SECTION 1.** The foregoing "WHEREAS" clause is hereby ratified and confirmed by
5 the City Council and incorporated herein by this reference.

6 **SECTION 2. AUTHORITY.** This Resolution is adopted pursuant to the provisions
7 of Ordinance No. 2021-02 (the "Ordinance"), Sections 166.021 and 166.041, Florida Statutes,
8 and other applicable provisions of law.

9 **SECTION 3. PURPOSE.** This Resolution constitutes the Preliminary Assessment
10 Resolution as defined in the Ordinance which initiates the process for developing the Residential
11 Solid Waste Services Special Assessment Roll and directs the imposition of a Residential Solid
12 Waste Services Special Assessment as described hereinafter, for the Fiscal Year beginning
13 October 1, 2024. Its purpose is to provide procedures and standards for the levy and collection
14 of a Residential Solid Waste Services Special Assessment for all Assessed Properties that receive
15 Residential Solid Waste Services under the general home rule powers of a municipality to impose
16 special assessments, and to authorize a procedure for the funding of Residential Solid Waste
17 Services providing special benefits to Assessed Properties within the City.

18 **SECTION 4. DEFINITIONS.** All capitalized words and terms not otherwise defined
19 herein shall have the meanings set forth in the Ordinance. Unless the context indicates otherwise,
20 words imparting the singular number, include the plural number, and vice versa. As used in this
21 Resolution, the following terms shall have the following meanings unless the context hereof
22 otherwise requires:

23 **"Assessed Property"** means Tax Parcels with an Improvement Code of Residential
24 Property that contain Dwelling Units that have obtained Certificates of Occupancy from the City,
25 and which receive Residential Solid Waste Services provided by the City

1 **"Assessment Coordinator"** means the person designated by the City to administer the
2 City's Residential Solid Waste Services, or such person's designee.

3 **"Contract"** means that Agreement with Advanced Disposal Services/Solid Waste
4 Southeast, Inc., dated July 22, 2019, as may be amended from time to time.

5 **"Cost Apportionment"** means the apportionment of the Residential Solid Waste
6 Services Assessed Cost among all Assessed Properties that receive Residential Solid Waste
7 Services pursuant to the apportionment methodology described in Section 8 of this Preliminary
8 Assessment Resolution.

9 **"Estimated Residential Solid Waste Services Special Assessment Rate Schedule"**
10 means that rate schedule attached hereto as Appendix "A" and hereby incorporated herein by
11 reference, specifying the Residential Solid Waste Services Assessed Costs determined in Section
12 9 of this Preliminary Assessment Resolution and the estimated Residential Solid Waste Services
13 Special Assessments established in Section 9 of this Preliminary Assessment Resolution.

14 **"Improvement Codes"** mean the building use codes (also known as DOR codes)
15 assigned by the Property Appraiser to Tax Parcels within the City.

16 **"Residential Property"** means those Tax Parcels with a Code Description designated
17 as Single-Family "Residential" within the Improvement Codes and those otherwise designated
18 as "Residential" within the Improvement Codes that are Collection Units that receive curbside
19 Residential Solid Waste Services by the City through the Contract.

20 **"Tax Parcel"** means a parcel of property located within the City to which the Property
21 Appraiser has assigned a distinct ad valorem property tax identification number.

22 **SECTION 5. PROVISION AND FUNDING OF RESIDENTIAL SOLID**
23 **WASTE SERVICES.**

24 (A) Upon the imposition of the Residential Solid Waste Services Special Assessment for
25 Residential Solid Waste Services upon Assessed Property located within the City, the City shall
26

1 provide Residential Solid Waste Services to such Assessed Property through the Contract. The
2 cost to provide such Residential Solid Waste Services to Assessed Properties, as described
3 herein, shall be funded from the proceeds of the Residential Solid Waste Services Special
4 Assessment.

5 (B) It is hereby ascertained, determined, and declared that each parcel of Assessed
6 Property located within the City will be benefited by the City's provision of Residential Solid
7 Waste Services in an amount not less than the Residential Solid Waste Services Special
8 Assessment imposed against such parcel, computed in the manner set forth in this Preliminary
9 Assessment Resolution.

10 **SECTION 6. IMPOSITION AND COMPUTATION OF RESIDENTIAL SOLID**
11 **WASTE SERVICES SPECIAL ASSESSMENTS.**
12

13 Residential Solid Waste Services Special Assessments shall be imposed against all
14 Assessed Properties that receive Residential Solid Waste Services, as provided herein. The Cost
15 Apportionment described herein is approved and adopted as the methodology to impose and
16 compute the Residential Solid Waste Services Special Assessment.

17 **SECTION 7. LEGISLATIVE DETERMINATIONS OF AUTHORITY,**
18 **SPECIAL BENEFIT AND FAIR APPORTIONMENT.**
19

20 The City Council incorporates and adopts the legislative findings relating to the
21 Residential Solid Waste Services within the Ordinance, and makes the following additional
22 legislative findings.

23 7.1 Section 403.706(1), Florida Statutes, provides that the City is responsible to
24 collect and transport solid waste from within its boundaries to a solid waste disposal facility.

25 7.2 To fulfill its obligations, the City entered into the Contract.

26 SPECIAL BENEFIT

27 7.3 The City provides Residential Solid Waste Services to the Assessed Properties

1 through its Contract. All Assessed Properties receive Residential Solid Waste Services, and
2 therefore are required to receive the City’s Residential Solid Waste Services through the City’s
3 Contract.

4 7.4 The special benefit provided to the Assessed Properties as a result of the
5 provision of Residential Solid Waste Services by the City through its Contract, and as a result of
6 the Residential Solid Waste Services Special Assessment include by way of example and not
7 limitation, the availability and use of Residential Solid Waste Services by the owners and
8 occupants of the Assessed Properties, the enhancement of environmentally responsible use and
9 enjoyment of developed residential properties in the City, the protection of public health and
10 safety, ensuring sanitary collection and disposal of solid waste from residential units in the City,
11 a potential increase in value to property, and better service to landowners and tenants.

12 7.5 The City’s provision of Residential Solid Waste Services through its Contract
13 possesses a logical relationship to the use and enjoyment of the Assessed Properties by:

14 7.5.1 protecting and potentially increasing the value of the Assessed
15 Properties by providing solid waste services;

16 7.5.2 enhancing the environmentally responsible use of residential land in the
17 City;

18 7.5.3 protecting the health of intended occupants in the use and enjoyment of
19 Assessed Properties by ensuring the proper collection and disposal of solid waste
20 from the Assessed Properties;

21 7.6 Commercial properties, and multi-family residential properties in the City that
22 do not receive curbside collection services, are not specially benefited by the City’s Residential
23 Solid Waste Services funded by the Residential Solid Waste Collection Special Assessment in
24 that those properties receive volume-based Solid Waste Services. Given the fact that commercial

1 properties, and residential properties with containerized collection services receive Solid Waste
2 Services on a volume basis, it is not possible to determine the exact annual costs that can be
3 apportioned to each property; therefore, it is not possible to ensure that an assessment levied
4 upon these properties can be fairly apportioned. As a result, it is fair and reasonable not to levy
5 a special assessment for the funding of residential Solid Waste Services upon those properties.

6 IMPOSITION AND COLLECTION

7 7.7 The Residential Solid Waste Services Special Assessments to be imposed
8 pursuant to this Resolution shall constitute non-ad valorem assessments within the meaning and
9 intent of the Uniform Assessment Collection Act.

10 7.8 The Residential Solid Waste Services Special Assessment imposed pursuant to
11 this Resolution is imposed by the City Council of the City of Westlake, not the Palm Beach
12 County Board of County Commissioners, Property Appraiser or Tax Collector. Any activity of
13 the Property Appraiser or Tax Collector under the provisions of this Resolution, and pursuant to
14 the City's agreements with such entities, shall be construed as ministerial.

15 7.9 So long as the Residential Solid Waste Services Special Assessment is levied,
16 the Assessed Properties will no longer be billed directly by the City for the Residential Solid
17 Waste Services they receive from the City through the Contract.

18 APPORTIONMENT

19 7.10 The size or the value of the Residential Property does not determine the scope of
20 the required solid waste services. The potential demand for Residential Solid Waste Services is
21 driven by the existence of a Residential unit.

22 7.11 Apportioning the Residential Solid Waste Assessed Costs for Residential Solid
23 Waste Services attributable to Assessed Properties on a per Residential unit basis is required to
24 avoid cost inefficiency and unnecessary administration and is a fair and reasonable method.

1 7.12 Because commercial properties, and multi-family residential properties that are
2 containerized collection do not benefit from the provision of Residential Solid Waste Services
3 by the City through the Contract, the Residential Solid Waste Services Assessed Costs are not
4 apportioned to those properties.

5 **SECTION 8. COST APPORTIONMENT METHODOLOGY.** The Contract
6 provides for an annual charge to the Assessed Properties for the Residential Solid Waste Services
7 provided by the City through its Contract. The Residential Solid Waste Services Assessed Costs
8 include other costs associated with the Residential Solid Waste Collection Special Assessment,
9 including a factor for early payment of tax bills, which are then allocated to the Assessed
10 Properties in addition to the annual charge in the Contract to determine the Assessment Amount.
11 The Assessment Amount is then multiplied by the number of Residential units on such Tax
12 Parcel. For the Fiscal Year commencing October 1, 2024, the annual charge for Assessed
13 Properties shall be as reflected in Appendix “A.”

14 Interim special assessments are authorized to be levied upon Assessed Properties at the
15 time of issuance of certificates of occupancy by the City. The assessment amount due at the time
16 of issuance of a certificate of occupancy shall be pro-rated on a monthly basis, and pursuant to a
17 schedule created by the Assessment Coordinator and available in the building department. The
18 interim assessment will also include the estimated assessment for the full following fiscal year
19 in order to recover the costs of providing Residential Solid Waste Services to the Assessed
20 Property until such time as the special assessment is placed on a future property tax bill. The
21 Assessment Coordinator is authorized to address issues where an Interim Assessment is collected
22 and an annual assessment is levied on a property tax bill for the same Dwelling Unit for the same
23 period of time to ensure no overpayments for the Residential Solid Waste Services provided by
24 the City.

1 **SECTION 9. DETERMINATION OF RESIDENTIAL SOLID WASTE**
2 **SERVICES ASSESSED COSTS; ESTABLISHMENT OF ANNUAL**
3 **RESIDENTIAL SOLID WASTE SERVICES ASSESSMENT RATES.**

4
5 (A) The Residential Solid Waste Collection Service Assessed Costs to be assessed and
6 apportioned among Assessed Properties pursuant to the Cost Apportionment for the Fiscal Year
7 commencing October 1, 2024, is the amount determined in the manner described in Section 8
8 above. The Estimated Residential Solid Waste Services Special Assessment Rate Schedule is
9 attached hereto as Appendix A. The approval of the Estimated Residential Solid Waste Services
10 Special Assessment Rate Schedule by the adoption of this Preliminary Assessment Resolution
11 determines the amount of the Residential Solid Waste Services Assessed Costs.

12 (B) The estimated Residential Solid Waste Services Special Assessments specified in
13 the Estimated Residential Solid Waste Services Special Assessment Rate Schedule are hereby
14 established to fund the Residential Solid Waste Services Assessed Costs determined to be
15 assessed in the Fiscal Year commencing October 1, 2024.

16 (C) The estimated Residential Solid Waste Services Special Assessments established in
17 this Preliminary Assessment Resolution shall be the estimated assessment rates applied by the
18 Assessment Coordinator in the preparation of the updated Residential Solid Waste Services
19 Special Assessment Roll for the Fiscal Year commencing October 1, 2024, as provided in Section
20 10 of this Preliminary Assessment Resolution.

21 **SECTION 10. ANNUAL RESIDENTIAL SOLID WASTE SERVICES SPECIAL**
22 **ASSESSMENT ROLL.**

23
24 (A) The Assessment Coordinator is hereby directed to prepare, or cause to be prepared,
25 a Residential Solid Waste Services Special Assessment Roll for the Fiscal Year commencing
26 October 1, 2024, in the manner provided in this Preliminary Assessment Resolution. The
27 Assessment Coordinator shall apportion the estimated Residential Solid Waste Collection
28 Service Assessed Cost to be recovered through Residential Solid Waste Services Special

1 Assessments in the manner set forth in this Preliminary Assessment Resolution. A copy of this
2 Preliminary Assessment Resolution, the Ordinance, and the Residential Solid Waste Services
3 Special Assessment Roll shall be maintained on file in the office of the City Clerk and open to
4 public inspection. The foregoing shall not be construed to require that the Residential Solid
5 Waste Services Special Assessment Roll proposed for the Fiscal Year commencing October 1,
6 2024 be in printed form if the amount of the Residential Solid Waste Services Special
7 Assessment for each parcel of property can be determined by the use of a computer terminal
8 available to the public.

9 (B) It is hereby ascertained, determined, and declared that the method of determining the
10 Residential Solid Waste Services Special Assessments for the City's Residential Solid Waste
11 Services as set forth in this Preliminary Assessment Resolution is a fair and reasonable method
12 of apportioning the Residential Solid Waste Services Assessed Cost among parcels of Assessed
13 Property located within the City, as the methodology and apportionment assures that no property
14 is assessed an amount greater than the benefit which it receives from the Residential Solid Waste
15 Services provided by the City through its Contract.

16 **SECTION 11. AUTHORIZATION OF PUBLIC HEARING.** There is hereby
17 established a public hearing to be held at 6:00 p.m., on September 3, 2024, at The Lodge at
18 Westlake Adventure Park located at 5490 Kingfisher Blvd., Westlake, Florida, 33470, at which
19 time the City Council will receive and consider any comments on the Residential Solid Waste
20 Services Special Assessment from the public and affected property owners and consider
21 imposing the Residential Solid Waste Services Special Assessment and collecting such
22 assessments on the same bill as ad valorem taxes.

23 **SECTION 12. NOTICE BY PUBLICATION.** The Assessment Coordinator shall
24 publish notice of the public hearing authorized by Section 11 hereof, in the manner and time

1 provided within the Ordinance. The notice shall be published no later than August 14, 2024, in
2 substantially the form attached hereto as Appendix B.

3 **SECTION 13. NOTICE BY MAIL.** The Assessment Coordinator shall also ensure
4 timely notice by mail, in the manner and time provided within the Ordinance. The notice shall
5 be mailed no later than August 14, 2024, in substantially the form attached hereto as Appendix
6 C.

7 **SECTION 14. PROOF OF NOTICE.** The Assessment Coordinator may provide
8 proof of such notice by affidavit, if any is required pursuant to the Ordinance or Resolution.

9 **SECTION 15. APPLICATION OF ASSESSMENT PROCEEDS.** Proceeds derived
10 by the City from the Residential Solid Waste Services Special Assessments will be utilized for
11 the provision of Residential Solid Waste Services, facilities, and programs by the City, through
12 its Contract, as described herein.

13 **SECTION 16. CONFLICT.** All resolutions or parts of resolutions in conflict herewith
14 are hereby repealed to the extent of such conflict.

15 **SECTION 17. SEVERABILITY.** If any clause, section, other part or application of
16 this Resolution is held by any court of competent jurisdiction to be unconstitutional or invalid,
17 in part or application, it shall not affect the validity of the remaining portions or applications of
18 this Resolution.

19 **SECTION 18. EFFECTIVE DATE.** This Preliminary Assessment Resolution shall
20 take effect immediately upon its passage and adoption.

21

22 *[Remainder of this page intentionally left blank]*

23

24

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42

PASSED AND APPROVED by City Council for the City of Westlake, on this 2nd day of July 2024.

City of Westlake
JohnPaul O'Connor, Mayor

Zoie Burgess, City Clerk

Approved as to Form and Sufficiency
City Attorney

APPENDIX A

**ESTIMATED RESIDENTIAL SOLID WASTE SERVICES
ASSESSMENT RATE SCHEDULE**

SECTION A-1 DETERMINATION OF RESIDENTIAL SOLID WASTE SERVICES ASSESSED COSTS. The estimated Residential Solid Waste Services Assessed Costs to be assessed for the Fiscal Year commencing October 1, 2024, is \$761,076.00.

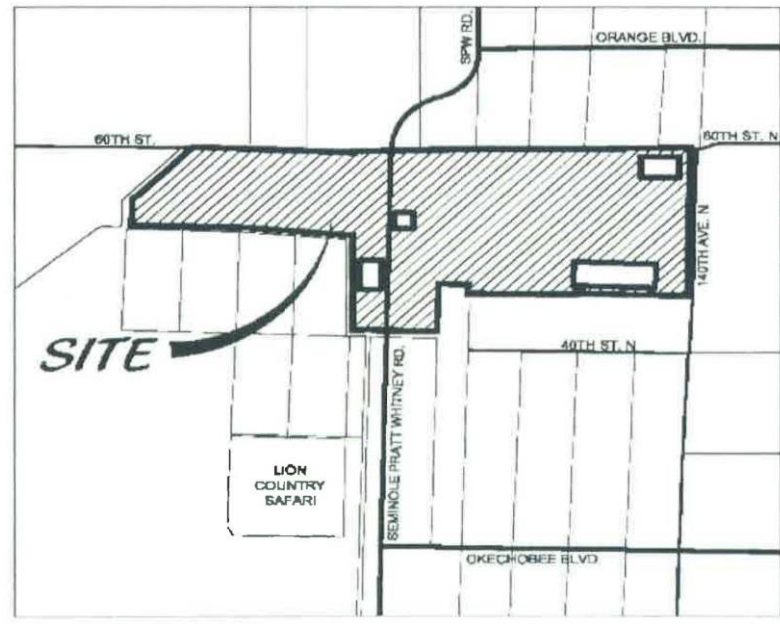
SECTION A-2 ESTIMATED RESIDENTIAL SOLID WASTE SERVICES ASSESSMENTS. The estimated Residential Solid Waste Services Special Assessments to be assessed and apportioned among benefitted parcels pursuant to the Cost Apportionment Methodology to generate the estimated Residential Solid Waste Services Assessed Cost for the Fiscal Year commencing October 1, 2024, are hereby established as follows for the purpose of this Preliminary Assessment Resolution:

\$ 324.00 PER RESIDENTIAL UNIT

APPENDIX B

FORM OF NOTICE TO BE PUBLISHED

To be published no later than August 14, 2024



**NOTICE OF HEARING TO IMPOSE AND
PROVIDE FOR COLLECTION OF RESIDENTIAL SOLID WASTE SERVICES SPECIAL ASSESSMENTS**

Notice is hereby given that the City Council of the City of Westlake will conduct a public hearing to consider imposing Residential Solid Waste Services Special Assessments upon Residential Units that receive Residential Solid Waste Services, for the provision by the City of Residential Solid Waste Services to such properties within the City of Westlake.

The hearing will be held at 6:00 p.m., on September 3, 2024, at The Lodge at Westlake Adventure Park located at 5490 Kingfisher Blvd., Westlake, Florida, 33470, for the purpose of receiving public comment on the proposed assessments. All affected property owners have a right to appear at the hearing and to file written objections with the City Council within 20 days of this notice. If a person decides to appeal any decision made by the City Council with respect to any matter considered at the hearing, such person will need a record of the proceedings and

may need to ensure that a verbatim record is made, including the testimony and evidence upon which the appeal is to be made. In accordance with the Americans with Disabilities Act, persons needing a special accommodation or an interpreter to participate in this proceeding should contact the Clerk of the City at (561) 530-5880, at least seven days prior to the date of the hearing.

The assessment for each parcel of residential property that receives Residential Solid Waste Services from the City will be based upon the total number of Residential units attributed to that parcel. The annual assessment shall be \$324.00 per Residential Unit.

Copies of the Assessment Ordinance, the Initial Assessment Resolution, the Preliminary Assessment Resolution and the Residential Solid Waste Services Special Assessment Roll are available for inspection at the City Clerk's Office, Westlake City Hall, 4001 Seminole Pratt Whitney Road, Westlake, Florida, 33470.

The assessments will be collected by the Tax Collector on the ad valorem tax bill to be mailed in November 2024, as authorized by section 197.3632, Florida Statutes. Failure to pay the assessments will cause a tax certificate to be issued against the property, which may result in a loss of title.

If you have any questions, please contact the City Clerk at (561) 530-5880, Monday through Friday between 9:00 a.m. and 4:00 p.m.

Zoie Burgess, CMC
City Clerk, City of Westlake
Publish: August 2, 2024

APPENDIX C
FORM OF MAILED NOTICE

[INSERT DATE], 2024

[Name]
[Address]
Westlake, Florida 33470

RE: *Tax Parcel #*

<p>CITY OF WESTLAKE, FLORIDA NOTICE OF HEARING TO IMPOSE AND PROVIDE FOR RESIDENTIAL SOLID WASTE SERVICES - NON-AD VALOREM ASSESSMENTS</p>

Dear Property Owner:

As required by Section 197.3632, Florida Statutes, and City of Westlake Ordinance No. 2021-02, notice is given by the City of Westlake that a special assessment for Residential Solid Waste Services using the tax bill collection method may be levied by the City of Westlake on your property for the fiscal year October 1, 2024 - September 30, 2025.

The purpose of this assessment is to collect the Residential Solid Waste Services Special Assessment benefiting property located within the City of Westlake. The total Residential Solid Waste Services Special Assessment revenue to be collected within the City of Westlake is \$761,076.00. The Residential Solid Waste Services Special Assessment is based on the number of Residential Units that receive curbside Residential Solid Waste Services, including curbside collection of solid waste and recyclable materials on your property. The special assessment is \$324.00 per Residential Unit. Your property has ___ Residential Units. The total special assessment for your property is \$_____.

A public hearing will be held at 6:00 p.m. on September 3, 2024, at The Lodge at Westlake Adventure Park located at 5490 Kingfisher Blvd., Westlake, Florida, 33470, for the purpose of receiving public comment on the proposed assessment. You and all other affected property owners have a right to appear at the hearing and to file written objections with the City Council within 20 days of this notice. If you decide to appeal any decision made by the City Council with respect to any matter considered at the hearing, you will need a record of the proceedings and may need to ensure that a verbatim record is made, including the testimony and evidence upon which the appeal is to be made. In accordance with the Americans with Disabilities Act, persons needing a special accommodation or an interpreter to participate in

this proceeding should contact the City Clerk's office at (561) 530-5880, at least three days prior to the date of the hearing.

Unless proper steps are initiated in a court of competent jurisdiction to secure relief within 20 days from the date of City Council action at the above hearing (including the method of apportionment, the rate of assessment and the imposition of assessments), such action shall be the final adjudication of the issues presented.

Copies of the Residential Solid Waste Services Special Assessment Ordinance, the Initial Assessment Resolution, the Preliminary Assessment Resolution, and the assessment roll are available for inspection at Westlake City Hall - City Clerk's Office, 4001 Seminole Pratt Whitney Road, Westlake, Florida 33470.

The Residential Solid Waste Services non-ad valorem assessment amount shown on this notice for the above parcel will be collected on the ad valorem tax bill mailed in November 2024. Failure to pay the assessments will cause a tax certificate to be issued against the property which may result in a loss of title.

If you have any questions regarding your Residential Solid Waste Services Special Assessment, please contact the City Clerk at (561) 530-5880, Monday through Friday between 9:00 a.m. and 4:00 p.m.

*** * * * * THIS IS NOT A BILL * * * * ***

File Attachments for Item:

C. Approving and Authorizing the Mayor or Vice Mayor to Execute the Sixth Addendum to Law Enforcement Agreement

Submitted By: Administration

RESOLUTION NO. 2024-14

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, APPROVING AND AUTHORIZING THE MAYOR OR VICE MAYOR TO EXECUTE THE SIXTH ADDENDUM TO THE LAW ENFORCEMENT SERVICE AGREEMENT BETWEEN THE CITY OF WESTLAKE AND THE SHERIFF OF PALM BEACH COUNTY, FLORIDA; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.



Meeting Agenda Item Coversheet

MEETING DATE:		July 2, 2024	Submitted By: Administration	
SUBJECT: <i>This will be the name of the Item as it will appear on the Agenda</i>		Approving and Authorizing the Mayor or Vice Mayor to Execute the Sixth Addendum to Law Enforcement Agreement		
STAFF RECOMMENDATION: (MOTION READY)		Motion to Approve Sixth Addendum to the Law Enforcement Service Agreement.		
SUMMARY and/or JUSTIFICATION:		<p>The City entered into an agreement for law enforcement services with the Palm Beach County Sheriff's Office on or around August 12, 2019.</p> <p>In keeping with the agreement, the Sherriff Office shall submit cost for services in anticipation of the City's budget process. The attached sixth addendum identifies the anticipated cost for Fiscal Year October 1, 2024, through September 30, 2025. The annual cost for services is \$1,066,606.00.</p>		
SELECT, if applicable		AGREEMENT:		BUDGET:
		STAFF REPORT:		PROCLAMATION:
		EXHIBIT(S):	X	OTHER:
IDENTIFY EACH ATTACHMENT. <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i>		Sixth Addendum to the Law Enforcement Service Agreement Agreement for Law Enforcement Services		
SELECT, if applicable		RESOLUTION:	X	ORDINANCE:
IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE <i>(if Item is <u>not</u> a Resolution or Ordinance, please erase all default text from this field's textbox and leave blank)</i>		<p style="text-align: center;">RESOLUTION NO. 2024-14</p> <p>A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, APPROVING AND AUTHORIZING THE MAYOR OR VICE MAYOR TO EXECUTE THE SIXTH ADDENDUM TO THE LAW ENFORCEMENT SERVICE AGREEMENT BETWEEN THE CITY OF WESTLAKE AND THE SHERIFF OF PALM BEACH COUNTY, FLORIDA; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.</p>		
FISCAL IMPACT (if any):		Annual Budget	\$1,066,606	103

1 CITY OF WESTLAKE

2 RESOLUTION NO. 2024-14

3 A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA,
4 APPROVING AND AUTHORIZING THE MAYOR OR VICE MAYOR TO EXECUTE THE
5 SIXTH ADDENDUM TO THE LAW ENFORCEMENT SERVICE AGREEMENT BETWEEN
6 THE CITY OF WESTLAKE AND THE SHERIFF OF PALM BEACH COUNTY, FLORIDA;
7 PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN
8 EFFECTIVE DATE.

9 WHEREAS, the City Council deems it to be in the best interests of the City to approve and
10 authorize the Mayor or Vice Mayor to execute the Fifth Addendum to the Law Enforcement Service
11 Agreement between the City of Westlake and the Sheriff of Palm Beach County, Florida;

12 NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF
13 WESTLAKE, FLORIDA:

14 SECTION 1. The foregoing "WHEREAS" clause is hereby ratified and confirmed by
15 the City Council and incorporated herein by this reference.

16 SECTION 2. The City Council of the City of Westlake, Florida, hereby approves and
17 authorizes the Mayor or Vice Mayor to execute the Sixth Addendum to the Law Enforcement Service
18 Agreement between the City of Westlake and the Sheriff of Palm Beach County, Florida. A copy of the
19 Sixth Addendum is attached hereto as Exhibit "A".

20 SECTION 3. CONFLICTS. All resolutions or parts of resolutions in conflict herewith are
21 hereby repealed to the extent of such conflict.

22 SECTION 4. SEVERABILITY. If any clause, section, other part or application of this
23 Resolution is held by any court of competent jurisdiction to be unconstitutional or invalid, in part or
24 application, it shall not affect the validity of the remaining portions or applications of this Resolution.

25 SECTION 5. EFFECTIVE DATE. This Resolution shall take effect immediately upon its
26 passage and adoption.

27 PASSED AND APPROVED by City Council for the City of Westlake, on this 2nd day of July
28 2024.

29
30
31 _____
32 City of Westlake
33 JohnPaul O'Connor, Mayor
34

35 _____
36 Zoie Burgess, City Clerk

SIXTH ADDENDUM TO THE LAW ENFORCEMENT SERVICE AGREEMENT
SHERIFF RIC L. BRADSHAW AND CITY OF WESTLAKE

This Sixth Addendum to the Law Enforcement Service Agreement is made by and between the City of Westlake (hereinafter referred to as “Westlake”) located in Palm Beach County, and Ric L. Bradshaw, Sheriff of Palm Beach County, Florida (hereinafter referred to as “Sheriff”). Westlake and the Sheriff shall hereinafter be referred to as the “Parties.”

WHEREAS, the Parties executed a Law Enforcement Service Agreement effective October 01, 2019, a First Addendum effective October 01, 2020, a Second Addendum effective October 01, 2021, a Third Addendum effective October 01, 2022, a Fourth Addendum effective August 01, 2023, and a Fifth Addendum effective October 02, 2023, (the “Agreement”), by which the Sheriff agreed to perform law enforcement services; and

WHEREAS, the Parties wish to set forth the consideration for the Sixth Year of the Contract Term, October 01, 2024 through September 30, 2025.

NOW, THEREFORE, in consideration of the mutual covenants herein contained the receipt and sufficiency of which are hereby acknowledged, it is agreed upon as follows:

1. Article 5, Section 5.1 of the Law Enforcement Service Agreement is amended as to the total amount due for services for the period beginning October 01, 2024 through September 30, 2025 as follows: The total amount due for the annual period referenced above shall be \$1,066,606.00. Monthly payments shall be \$88,883.83. The last monthly payment shall be \$88,883.87.
2. Article 5, Section 5.3, regarding additional law enforcement services of the Law Enforcement Service Agreement is amended and shall now read as follows:

Additional law enforcement services as set forth in Article 2.1 (E) shall be compensated at a rate of \$116.00 per hour and will be billed by the SHERIFF to the CITY on a monthly basis. This rate is subject to annual review and change upon agreement between the CITY and SHERIFF. Alternatively, the CITY may opt to submit an application for an off-duty permit.

3. In all other respects and unless otherwise stated, the terms and conditions of the Agreement, which includes prior Addendums, shall continue unchanged and in full force and effect.

IN WITNESS WHEREOF, the Parties hereto have executed the Addendum to this Agreement as of the last date all signatures below are affixed.

PALM BEACH COUNTY SHERIFF’S OFFICE

CITY OF WESTLAKE

BY: _____
Ric L. Bradshaw

BY: _____
JohnPaul O’Connor

Title: Sheriff

Title: Mayor

Witness: _____
Eric Coleman, Major

Witness: _____
Zoie P. Burgess, City Clerk

DATE: _____

DATE: _____

EXHIBIT A*

Previous District 18 Allocations		Current District 18 Allocations	
Title	Quantity	Title	Quantity
Deputy Sheriff	7	Deputy Sheriff	7
TOTAL	7	TOTAL	7

*This Exhibit A was adopted as part of the 6th Addendum effective October 01, 2024.

File Attachments for Item:

D. FIRST READING - ORDINANCE 2024-02 — Establishing Residency Prohibitions and Exceptions for Sexual Offenders and Sexual Predators

Submitted By: City Attorney's Office

ORDINANCE NO. 2024-02

AN ORDINANCE OF THE CITY COUNCIL FOR THE CITY OF WESTLAKE, FLORIDA, ESTABLISHING CERTAIN RESIDENCY PROHIBITIONS AND EXCEPTIONS FOR SEXUAL OFFENDERS AND SEXUAL PREDATORS; PROVIDING FOR FINDINGS AND INTENT; PROVIDING FOR DEFINITIONS; PROVIDING FOR PENALTIES; PROVIDING FOR CODIFICATION, CONFLICTS, SEVERABILITY, AND AN EFFECTIVE DATE.



Meeting Agenda Item Coversheet

MEETING DATE:		July 2, 2024	Submitted By: City Attorney's Office	
SUBJECT: <i>This will be the name of the Item as it will appear on the Agenda</i>		FIRST READING - ORDINANCE 2024-02 — Establishing Residency Prohibitions and Exceptions for Sexual Offenders and Sexual Predators		
STAFF RECOMMENDATION: (MOTION READY)		Motion to Approve on First Reading ORDINANCE 2024-02 — Establishing Residency Prohibitions and Exceptions for Sexual Offenders and Sexual Predators		
SUMMARY and/or JUSTIFICATION:		The City Council is asked to consider adoption of a Sexual Offenders and Sexual Predator Ordinance. The proposed ordinance establishes policies and procedures to provide for residency prohibitions and exceptions for sexual offenders and sexual predators within the City of Westlake.		
SELECT, if applicable		AGREEMENT:		BUDGET:
		STAFF REPORT:	X	PROCLAMATION:
		EXHIBIT(S):	X	OTHER:
IDENTIFY EACH ATTACHMENT. <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i>		Agenda Item Cover Sheet Ordinance		
SELECT, if applicable		RESOLUTION:		ORDINANCE: X
IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE <i>(if Item is <u>not</u> a Resolution or Ordinance, please erase all default text from this field's textbox and leave blank) <u>Please keep text indented.</u></i>		ORDINANCE NO. 2024-02 AN ORDINANCE OF THE CITY COUNCIL FOR THE CITY OF WESTLAKE, FLORIDA, ESTABLISHING CERTAIN RESIDENCY PROHIBITIONS AND EXCEPTIONS FOR SEXUAL OFFENDERS AND SEXUAL PREDATORS; PROVIDING FOR FINDINGS AND INTENT; PROVIDING FOR DEFINITIONS; PROVIDING FOR PENALTIES; PROVIDING FOR CODIFICATION, CONFLICTS, SEVERABILITY, AND AN EFFECTIVE DATE.		
FISCAL IMPACT (if any):				\$

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39

ORDINANCE NO. 2024-02

AN ORDINANCE OF THE CITY COUNCIL FOR THE CITY OF WESTLAKE, FLORIDA, ESTABLISHING CERTAIN RESIDENCY PROHIBITIONS AND EXCEPTIONS FOR SEXUAL OFFENDERS AND SEXUAL PREDATORS; PROVIDING FOR FINDINGS AND INTENT; PROVIDING FOR DEFINITIONS; PROVIDING FOR PENALTIES; PROVIDING FOR CODIFICATION, CONFLICTS, SEVERABILITY, AND AN EFFECTIVE DATE.

WHEREAS, the City Council finds it is in the public's interest to establish policies and procedures to provide for residency prohibitions and exceptions for sexual offenders and sexual predators within the City of Westlake.

NOW, THEREFORE, BE IT ORDAINED BY THE GOVERNING BODY FOR THE CITY OF WESTLAKE, FLORIDA, AS FOLLOWS:

SECTION 1. Recitals. The foregoing recitals are confirmed, adopted and incorporated herein and made a part hereof by this reference.

SECTION 2. The City Council hereby creates Ordinance No. 2024-02 to provide for certain residence prohibitions and exceptions for sexual offenders and sexual predators, and to provide for findings and intent and penalties as follows:

Findings and intent.

(a) Repeat sexual offenders, sexual offenders who use physical violence and sexual offenders who prey on children are sexual predators who present an extreme threat to the public safety. Sexual offenders/sexual predators are extremely likely to use physical violence and to repeat their offenses, and most sexual offenders/sexual predators commit many offenses, have many more victims than are ever reported, and are prosecuted for only a fraction of their crimes. This makes the cost of sexual offender/sexual predator victimization to society at large, while incalculable, clearly exorbitant.

(b) It is the intent of this article to serve and to protect the city's compelling interest to promote, protect and improve the health, safety and welfare of the citizens of the city by creating areas around locations where children regularly congregate in concentrated numbers wherein certain sexual offenders and sexual predators are prohibited from establishing temporary or permanent residence.

Definitions.

The following words, terms and phrases, when used in this chapter, shall have the meanings ascribed to them, except where the context clearly indicates a different meaning.

Conviction means a determination of guilt which is the result of a trial of the entry of a plea of guilty or nolo contendere, regardless of whether adjudication is withheld.

1 Permanent residence means a place where a person abides, resides, lodges for fourteen (14)
2 or more consecutive days, and which includes, motor vehicles, trailers, mobile homes,
3 manufactured homes, vessels, live-aboard vessels, houseboats.

4 Sexual offender shall have the same meaning ascribed to such term as used in F.S. §
5 943.0435

6 Sexual predator shall have the same meaning ascribed to such term in F.S. § 775.21(4)(a)

7 Temporary residence means a place where person abides, resides, or lodges for a period of
8 fourteen (14) days or more in the aggregate, during any calendar year, and which is not the
9 person's permanent residence, or a place where a person routinely abides, resides, or lodges for
10 a period of four (4) or more consecutive or nonconsecutive days in any month and which is not
11 the person's permanent residence, and which includes, motor vehicles, trailers, mobile homes,
12 manufactured homes, vessels, live-aboard vessels, houseboats.

13 **Sexual offender and sexual predators residence prohibitions; exceptions; penalties.**

14 (a) Prohibited location of residence. It is unlawful for any person who:

15 (1) Has been convicted of a violation of F.S. §§ 794.011, 800.04, 827.071, 847.0145,
16 regardless of whether adjudication has been withheld in which the victim of the
17 offense was less than sixteen (16) years of age; or

18 (2) Is required to register as a sexual offender or sexual predator with the State of
19 Florida Department of Law Enforcement due to an offense where the victim was
20 less than sixteen (16) years of age; or

21 (3) Committed a comparable crime(s) in another state and is identified as a sexual
22 offender or sexual predator, and in which case the victim of the offense was less
23 than sixteen (16) years of age;

24 to establish a permanent residence or temporary residence within two thousand five
25 hundred (2,500) feet of any public or private school, public library, day care center,
26 specifically including residential or home based day care operating under a valid city
27 Business Tax Receipt (BTR); park, playground, community center, day camp, or any
28 other place where children regularly congregate.

29 (b) Measurement of distance. For purposes of determining the minimum distance separation,
30 the distance shall be measured by following a straight line from the outer property line of
31 the permanent residence or temporary residence, to the nearest outer property line of the
32 designated public library, day care center, park, playground, community center, day camp,
33 or any other place where children regularly congregate.

34 (c) Exceptions. A person residing within two thousand five hundred (2,500) feet of any
35 designated school, public library, day care center, park, playground, community center, day
36 camp, or any other place where children regularly congregate, does not commit a violation
37 of this section if any of the following apply:

38 (1) The person established the permanent residence prior to the effective date of this
39 article.

- 1 (2) The person was a minor when he/she committed the offense and was not convicted
2 as an adult.
- 3 (3) The person is a minor.
- 4 (4) The designated school, public library, day care center, park, playground,
5 community center, day camp, or any other place where children regularly
6 congregate within two thousand five hundred (2,500) feet of the person's
7 permanent or temporary residence was opened and/or established after the person
8 established the permanent or temporary residence.
- 9 (d) Penalties. A person who violates this article shall be punished by a fine not exceeding five
10 hundred dollars (\$500.00) or by imprisonment for a term not exceeding sixty (60) days, or
11 by both such fine and imprisonment; for a second or subsequent conviction of a violation
12 of this section, such person shall be punished by a fine not to exceed one thousand dollars
13 (\$1,000.00) or imprisonment in the county jail not more than twelve (12) months, or by
14 both such fine and imprisonment.

15 **Rental of real property to certain sexual offenders and sexual predators prohibited.**

- 16 (a) It is unlawful to lease, rent, or otherwise convey (exclusive of sales involving transfer of
17 one hundred (100) percent ownership interest) any dwelling, structure, or part thereof,
18 trailers or other conveyances, to any person prohibited from establishing such permanent
19 residence or temporary residence pursuant to this article, if such dwelling, or part thereof,
20 is going to be used as a permanent residence or temporary residence of the person, and the
21 dwelling is located within two thousand five hundred (2,500) feet of any designated school,
22 public library, day care center, park, playground, community center, day camp, or any other
23 place where children regularly congregate.
- 24 (b) A property owner or property manager's failure to comply with the requirements of this
25 section shall constitute a violation of this section, and shall subject the property owner,
26 property manager or other person or entity in the care, custody or control of the real property
27 to enforcement proceedings as authorized by City Code or by any other means of
28 enforcement allowed by law.

29 **Application of article/existing contracts.**

30 The provisions of this article shall not be applied to persons residing at a prohibited location
31 on the effective date of this article such that it is not the intent of this article to impair valid,
32 existing and bona fide contract rights; provided, however, that the provisions of this article shall
33 apply upon termination of any beneficial/ownership interest in real property, termination of any
34 leasehold relationship arising from a landlord tenant relationship or the expiration of a lease.
35 When a person who is the subject of this article changes residences, this article shall fully apply
36 to such persons.

37 **SECTION 3. Codification.** It is the intention of the City Council of the City of Westlake
38 that the provisions of this Ordinance shall become and be made a part of the Code of Ordinances
39 of the City of Westlake, Florida, and that the Sections of this Ordinance may be renumbered, re-
40 lettered and the word "Ordinance" may be changed to "Section," "Article" or such other word
41 or phrase in order to accomplish such intention.

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42

SECTION 4. Conflicts. All ordinances or parts of ordinances, resolutions or parts of resolutions which are in conflict herewith, are hereby repealed to the extent of such conflict.

SECTION 5. Severability. Should the provisions of this ordinance be declared to be severable and if any section, sentence, clause or phrase of this ordinance shall for any reason be held to be invalid or unconstitutional, such decision shall not affect the validity of the remaining sections, sentences, clauses, and phrases of this ordinance but they shall remain in effect, it being the legislative intent that this ordinance shall remain notwithstanding the invalidity of any part.

SECTION 6. Effective Date. This ordinance shall be effective upon adoption on second reading.

PASSED this _____ day of _____, 2024, on first reading.

PUBLISHED on this _____ day of _____, 2024 in the Palm Beach Post.

PASSED AND ADOPTED this _____ day of _____, 2024, on second reading.

City of Westlake
JohnPaul O’Connor, Mayor

ATTEST:

Zoie Burgess, CMC, City Clerk

APPROVED AS TO LEGAL FORM:

CITY ATTORNEY

File Attachments for Item:

A. Update to City of Westlake's Housing Assistance Guidelines

Submitted By: Administration

RESOLUTION 2024-15

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA,
APPROVING AND ADOPTING THE CITY OF WESTLAKE'S REVISED HOUSING
ASSISTANCE PURCHASE PROGRAM YEARLY GUIDELINES; PROVIDING FOR
CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.**



Meeting Agenda Item Coversheet

MEETING DATE:		July 2, 2024	Submitted By: Legal	
SUBJECT: <i>This will be the name of the Item as it will appear on the Agenda</i>		Update to City of Westlake's Housing Assistance Guidelines		
STAFF RECOMMENDATION: (MOTION READY)		Motion to Approve		
SUMMARY and/or JUSTIFICATION:	<p>HAPPY PROGRAM PROPOSED UPDATES</p> <p>The City has partnered with Minto PBLH, LLC and the Westlake Community Foundation, Inc. in an innovative program to eligible applicants in securing homeownership by providing zero-interest, forgivable loans. The program has several million dollars in available funding but under the current HAPPY program parameters, many potential applicants are disqualified because their household income exceeds the affordable housing parameters. However, many of these potential homeowners also find that they are priced out of quality homeownership in Palm Beach County. The changes proposed are an attempt to bridge that gap.</p> <ul style="list-style-type: none"> • The proposed amendments would expand the HAPPY program to support attainable housing for occupationally qualified eligible households. <ul style="list-style-type: none"> o Households that have at least one property owner working full time as an Essential Service Personnel may qualify for the HAPPY program. o The list of qualifying Essential Services Personnel was derived from the Florida Hometown Heroes program that was used by the state during and immediately after the pandemic. <ul style="list-style-type: none"> <input type="checkbox"/> Examples include teachers and educators, other school district personnel, community college and university employees, police and fire personnel, health care, local government personnel in Palm Beach County, and persons employed and certified in one of the eligible occupations described in the Exhibit, which was created by the state for the Florida Hometown Heroes Loan Program. o These applicants must provide proof of certification/licensure required by the City. o The total annual income of an occupationally qualified applicant's household cannot exceed \$300,000. o Occupationally qualified applicants will receive a maximum award of \$25,000. However, if more than one person is employed full time as an Essential Services Personnel, the total amount may be increased by up to \$10,000 (\$35,000 total) based on eligible homebuyer applicant's circumstances and at the City Manager's discretion. • The references to specific years have been removed, so the program does not need to be readopted every year. 			
	SELECT, if applicable		AGREEMENT:	
		STAFF REPORT:	X	PROCLAMATION:
		EXHIBIT(S):	X	OTHER:

<p>IDENTIFY EACH ATTACHMENT. <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i></p>	<p>Agenda Item Cover Sheet Resolution</p>		
<p>SELECT, if applicable</p>	<p>RESOLUTION: x</p>		<p>ORDINANCE:</p>
<p>IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE <i>(if Item is <u>not</u> a Resolution or Ordinance, please erase all default text from this field's textbox and leave blank)</i> <u>Please keep text indented.</u></p>	<p>A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, APPROVING AND ADOPTING THE CITY OF WESTLAKE'S REVISED HOUSING ASSISTANCE PURCHASE PROGRAM YEARLY GUIDELINES; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.</p>		
<p>FISCAL IMPACT (if any):</p>			<p>\$</p>

1
2
3
4
5
6
7
8
9
10
11
12

13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40

CITY OF WESTLAKE

RESOLUTION NO. 2024-_____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA, APPROVING AND ADOPTING THE CITY OF WESTLAKE’S REVISED HOUSING ASSISTANCE PURCHASE PROGRAM YEARLY GUIDELINES FOR THE PURPOSES OF UPDATING; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the City Council deems it to be in the best interests of the City to approve and adopt the City of Westlake’s Revised Housing Assistance Purchase Program Yearly Guidelines;

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF WESTLAKE, FLORIDA:

SECTION 1. The foregoing "WHEREAS" clause is hereby ratified and confirmed by the City Council and incorporated herein by this reference.

SECTION 2. The City Council of the City of Westlake, Florida, hereby approves and adopts the City of Westlake’s Revised Housing Assistance Purchase Program Yearly Guidelines for the purposes of updating. A copy of the Revised Housing Assistance Purchase Program Yearly Guidelines is attached hereto as Exhibit “A”.

SECTION 3. CONFLICTS. All resolutions or parts of resolutions in conflict herewith are hereby repealed to the extent of such conflict.

SECTION 4. SEVERABILITY. If any clause, section, other part or application of this Resolution is held by any court of competent jurisdiction to be unconstitutional or invalid, in part or application, it shall not affect the validity of the remaining portions or applications of this Resolution.

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28

SECTION 5. EFFECTIVE DATE. This Resolution shall take effect immediately upon its passage and adoption.

PASSED AND APPROVED by City Council for the City of Westlake, on this ____ day of _____ 2024.

City of Westlake
JohnPaul O'Connor, Mayor

Zoie Burgess, City Clerk

HAPPY PROGRAM PROPOSED UPDATES

The City has partnered with Minto PBLH, LLC and the Westlake Community Foundation, Inc. in an innovative program to eligible applicants in securing homeownership by providing zero-interest, forgivable loans. The program has several million dollars in available funding but under the current HAPPY program parameters, many potential applicants are disqualified because their household income exceeds the affordable housing parameters. However, many of these potential homeowners also find that they are priced out of quality homeownership in Palm Beach County. The changes proposed are an attempt to bridge that gap.

- **The proposed amendments would expand the HAPPY program to support attainable housing for occupationally qualified eligible households.**
 - Households that have at least one property owner working full time as an Essential Service Personnel may qualify for the HAPPY program.
 - The list of qualifying Essential Services Personnel was derived from the Florida Hometown Heroes program that was used by the state during and immediately after the pandemic.
 - Examples include teachers and educators, other school district personnel, community college and university employees, police and fire personnel, health care, local government personnel in Palm Beach County, and persons employed and certified in one of the eligible occupations described in the Exhibit, which was created by the state for the Florida Hometown Heroes Loan Program.
 - These applicants must provide proof of certification/licensure required by the City.
 - The total annual income of an occupationally qualified applicant's household cannot exceed \$300,000.
 - Occupationally qualified applicants will receive a maximum award of \$25,000. However, if more than one person is employed full time as an Essential Services Personnel, the total amount may be increased by up to \$10,000 (\$35,000 total) based on eligible homebuyer applicant's circumstances and at the City Manager's discretion.
- **The references to specific years have been removed, so the program does not need to be readopted every year.**



Housing Assistance Purchase Program Yearly Guidelines

~~Fiscal Year 2022-2023~~



Formatted: Footer distance from edge: 0.38"

Formatted: Line spacing: Exactly 9 pt

The City of Westlake implemented an attainable, affordable, and workforce housing assistance purchase program to maintain the economic and social sustainability of housing supply within the city limits at various income ~~limits~~levels. The City has partnered with the Developer, Minto PBLH, LLC ("~~Minto~~MINTO") and the Westlake Community Foundation, Inc. ("~~FOUNDATION~~Foundation"), in an innovative program to fund eligible applicants under the Housing and Urban Development categories for low-, moderate-, and middle-income households based upon income limitations, or under an occupation-based qualification system established by the City.

The City, Palm Beach County, developers, local businesses, and residents will all benefit from the availability of attainable, affordable, and workforce housing units. The City will cooperate with other Federal, State, and local governmental agencies and local for-profit and not-for-profit organizations in a collaborative effort to maximize the utilization of funding sources for attainable, affordable housing, and workforce housing assistance in creating a sustainable framework to meet the needs of the community and future residents.

DEFINITIONS

Affordable Housing – Housing that is affordable for households at or below 80% of the Area Median Income as defined by the United States Department of Housing and Urban Development (“HUD”) income limits per household size and that meets maximum housing payments established by HUD, Florida Housing Finance, or local ordinance. Housing payments generally do not exceed 30% of a household’s gross monthly income.

Affordable Housing Assistance – Any loans, grants, fee reductions, or other incentives provided by the City of Westlake to facilitate the construction, purchase, or rental of affordable and/or workforce housing to qualified eligible homebuyer applicants.

Attainable, Affordable, and Workforce Housing Loan Program – A City of Westlake program that provides loans to be used for the construction and purchase of housing serving: a) households up to 140% of the Area Median Income; or b) certain other households in which at least one property owner is occupied full time as Essential Service Personnel and the household meets all other applicable program requirements. Loans may be provided as direct loans or limited loan guarantees for single-family new construction, multi-family new construction homes, and resale on existing housing inventory.

Affordability Period – Funds provided under the Housing Program shall carry a ten (10) year restriction to maintain the affordable and/or workforce housing designation. After the expiration of ten (10) years of continued occupancy by the eligible applicant or surviving spouse, the loan will be forgiven.

Annual Reporting – The City of Westlake shall provide an annual accounting of all funds utilized during the prior year, with detailed data on the number of eligible applicants housing assistance was provided to, for the purposes of home purchase or rental assistance.

Attainable Housing – Housing that is attainable for households in which at least one property owner is occupied full-time as Essential Service Personnel and meets all other applicable program requirements.

Eligible Homebuyer Applicant - A person or household who either: a) meets federal and/or state income guidelines for very low-income, low-income, moderate-income or middle-income persons or households and who must have been approved for financing by an organization other than the
[4884-0843-9242, v. 1](#)

Formatted: Font: Bold

Formatted: Line spacing: Exactly 9 pt

City, including but not limited to a non-profit corporation or a local lending institution or an entity, including an individual, partnership, for profit or non-profit corporation which has approved financing which meets the federal and/or state guidelines for very low-income, low-income, moderate-income, or middle-income persons or households (collectively, “income qualified”); or b) qualifies as Essential Service Personnel and whose annual household income does not exceed \$300,000 (“occupationally qualified”).

Essential Service Personnel - ~~Includes~~ but is not limited to teachers and educators, other school district personnel, community college and university employees, police and fire personnel, health care personnel, ~~and~~ local government personnel in Palm Beach County, and persons who are employed and certified in one of the eligible occupations described in the Florida Hometown Heroes Loan Program administered by the State of Florida as it exists on ~~_____~~, 2023 described in Exhibit A, attached hereto as Exhibit A.

Formatted: Font color: Accent 6, Highlight

First Time Homebuyer — A person who has not owned or occupied a home as their primary residence in the last three years.

Housing Trust Fund — A City of Westlake fund established for the construction, purchase, or rental of attainable, affordable, and workforce housing. All funds received from the Developer will be deposited into the Housing Trust Fund to assist with the purchase or rental of attainable, affordable, and

Formatted: Line spacing: Exactly 9 pt

workforce housing ~~through the Housing Assistance Purchase Program and all funds shall only be utilized for housing assistance, pursuant to the City of Westlake Housing Assistance Purchase Program Yearly Guidelines. All funds shall only be utilized for housing assistance through the City of Westlake Housing Assistance Purchase Program.~~

HUD — ~~T~~the United States Department of Housing and Urban Development.

Formatted: Font: Not Bold

Income Limits— One of the determining eligibility factors for Federal and State housing assistance programs. Income limits are set by HUD on an annual basis. HUD provides definitions for very low, low, and moderate income which vary by program and are determined by the gross household income and household size.

Primary Residence— ~~A~~a person's primary residence or main residence is the dwelling where the person usually lives. A person can only have one primary residence at any given time. It is considered the legal residence for the purposes of a homestead exemption, income tax, and/or acquiring a mortgage.

Formatted: Font: Not Bold

~~**Qualified Eligible Homebuyer Applicant**— A person or household who either: a) meets federal and/or state income guidelines for very low income, low income, moderate income or middle income persons or households and who must have been approved for financing by an organization other than the City, including but not limited to a non profit corporation or a local lending institution or an entity, including an individual, partnership, for profit or non profit corporation which has approved financing which meets the federal and/or state guidelines for very low income, low income, moderate income, or middle income persons or households (collectively, "income qualified"); or b) qualifies as Essential Service Personnel ("occupationally qualified").~~

Veterans— ~~a~~a person who served in the active military such as Army, Navy, Air Force, National Guard, and Reserve of the United States of America and who was discharged or released therefrom under conditions other than dishonorable. ~~If qualified, Veterans if qualify~~ are entitled to participate in the Housing Assistance Program. ~~in addition t~~Theyand may qualify for an additional 3% to be used towards the purchase of a home in the City of Westlake on homes that do not exceed the maximum purchase price allowed in the program. Veterans who are also considered Essential Service personnel can only qualify for one program.

Formatted: Font: (Default) Times New Roman, 12

Formatted: Font: (Default) Times New Roman, 12 pt, Font color: Black

Formatted: Font: (Default) Times New Roman, 12

Formatted: Font: 12 pt

Formatted: Font: (Default) Times New Roman, 12

Workforce Housing — Housing which is affordable for households with incomes between 121% and 140% of the Area Median Income. Area median income eligibility for workforce housing programs will be based on a percentage of the median income as published by the U. S. Department of Housing and Urban Development, Fannie Mae, or the State of Florida, as adjusted for household size.

HOUSING TRUST FUND

Sources of Funds for the Housing Trust Fund ~~i~~include all voluntary funds received from Minto and future developers and property owners within the City of Westlake, through the ~~FOUNDATION~~Foundation. The funds received shall be designated for the ~~attainable, affordable,~~ housing and workforce housing assistance purchase program. All proceeds from the sale of properties within the City of Westlake designated for the Housing Trust Funds shall be deposited into and only utilized for the Housing Program and related expenses.

Formatted: Line spacing: Exactly 9 pt

- The Foundation shall collect \$1,500.00 from the sale and re-sale of all residential housing products within the City of Westlake's jurisdictional boundaries. Provisions for the collection of said funds ~~is~~are provided for in the Homeowner's Association documents.

Page 3 of 7
City of Westlake
Housing Assistance Purchase Program Yearly Guidelines

- The Foundation may adjust the housing fee amount of \$1,500.00, upward, or downward, depending on the housing product type being developed. Multi-family housing products may contribute less than \$1,500.00 per housing unit, and higher end housing product types may contribute more than \$1,500.00 per housing unit.
- The Foundation shall collect a percentage of sale proceeds from the sale and re-sale of all nonresidential properties within the City of Westlake's jurisdictional boundaries. Provisions for the collection of said funds ~~is~~are provided for in the commercial property owner's association documents.
- All funds collected and deposited into the Foundation, minus five percent (5%) for administrative expenses, shall be transferred to the City of Westlake's Housing Trust Fund on a quarterly basis.
- All funds deposited into the City of Westlake's Housing Trust Fund shall be deposited in a separate and segregated account and shall be dedicated solely to the construction and purchase of single family and multi-family attainable, affordable, and/or workforce housing units within the boundaries of the City of Westlake.
- Any funds which remain uncommitted at the end of the City's fiscal year, ~~including interest, other earned income, or repayments on loans~~ shall remain in the Housing Trust Fund and shall be used for the purposes set forth herein during the next fiscal year, including interest, other earned income, or repayments on loans.
- A maximum of seven percent (7%) of the Housing Trust Funds may be utilized for administrative expense related to the costs associated with the loan processing, loan servicing, and operating expenses directly associated with the administration of the Housing Program or other related housing assistance programs.
- Annual reporting shall be provided to the ~~C~~city ~~C~~council on all approved housing purchases funded through the Housing Trust Fund.
- All projects funded through the Housing Trust Fund must include an application process, written underwriting standards, loan and grant documents containing repayment provisions, and provision and instruments that guarantee affordability periods.
- All fund loans, grants, or other financial incentives shall be reviewed and approved by the ~~C~~city ~~M~~anager and the ~~C~~city ~~A~~ttorney, with documents being executed by the ~~M~~ayor.
- The City may utilize Housing Trust Funds to provide rental assistance ~~in the future,~~ as rental units become available within the City of Westlake in the future.

APPROVAL PROCESS

Eligible homebuyer applicants must qualify and must receive counseling prior to loan closing, with preference being given to first-time homebuyers and essential service personnel.

[4884-0843-9242, v. 1](#)

Formatted: Line spacing: Exactly 9 pt

Page 4 of 7
City of Westlake
Housing Assistance Purchase Program Yearly Guidelines

| [4884-0843-9242_v.1](#)

Formatted: Line spacing: Exactly 9 pt

Eligible homebuyer applicants must be ~~very low income, low income, or moderate income, and middle income limits~~ income qualified or occupationally qualified, and ~~occupy the property the property towards which the funding will be applied must serve~~ as their primary residence.

Eligible homebuyer applicants must provide three percent (3%) of the purchase price, from their personal funds as part of the down payment for eligibility purposes of the home assistance purchase program.

~~Eligible homebuyer applicants will be considered on a first-come first-served, first-qualified basis for assistance, subject to funding availability. Eligible homebuyer applicants must meet all qualification guidelines for the appropriate~~ qualification income-group. ~~Eligible homebuyer applicants must be United States citizen(s). Proof of citizenship will be required.~~

Formatted: Justified, Space Before: 13.85 pt, Line spacing: Exactly 13.75 pt

The home must be located within the City of Westlake.

Eligible homebuyer applicants must have a FICO credit score of at least 620. Based upon extenuating circumstances, the Ceity Mmanager has the discretion to approve an application with a credit score between 600 and 619. If the credit score is less than 600 the homebuyer applicant will be deemed ineligible for a grant or loan award.

No re-payment is due as long as the home remains the primary residence of the eligible homebuyer applicant or surviving spouse. If the home is sold or leased, title is transferred or conveyed, or the home ceases to be the primary residence of the eligible homebuyer applicant or surviving spouse during the term of the loan, the outstanding balance of the loan will be due and payable within 60 days.

INCOME QUALIFIED APPLICANTS:

Eligible homebuyer applicants shall not have liquid assets exceeding \$30,000.00, except for amounts invested in financial instruments exclusively designated as a retirement account such as an IRA or 401K plan.

~~Applicants will be considered on a first _come first _served, first _qualified basis for assistance, subject to funding availability. Applicants must meet all affordability and income qualification guidelines for the appropriate income group. Applicants must be United States citizen(s). Proof of citizenship will be required.~~

~~The home must be located within the City of Westlake.~~ Where State and/or Federal funds are utilized, the sales price of the home shall not exceed the maximum sales price as established by Palm Beach County and/or the State of Florida according to HUD guidelines. The sales price may exceed the median purchase price of the statistical area, as adjusted annually, utilizing all other sources of funds.

~~Eligible homebuyer applicants must have a FICO credit score of at least 620. Based upon extenuating circumstances, the Ceity Mmanager has the discretion to approve an application with a credit score between 600 and 619. If the credit score is less than 600 the homebuyer applicant will be deemed ineligible for a grant or loan award.~~

Formatted: Line spacing: Exactly 9 pt

4884-0843-9242, v. 1

No re-payment is due as long as the home remains the primary residence of the eligible homebuyer applicant or surviving spouse. If the home is sold or leased, title is transferred or conveyed, or the home ceases to be the primary residence of the eligible homebuyer applicant or surviving spouse during the term of the loan, the outstanding balance of the loan will be due and payable within 60 days.

INCOME GUIDELINES

WHP INCOME CATEGORIES
Low (60-80% of AMI)
Moderate-1 (>80-100% of AMI)
Moderate-2 (>100-120% of AMI)
Middle (>120-140% of AMI)

Commented [KR1]: Deleted 2021 Income and sales price levels so it adjusts annually

Formatted Table

Formatted: Line spacing: Exactly 9 pt

OCCUPATIONALLY QUALIFIED APPLICANTS:

Formatted: Left

Eligible homebuyer applicants shall be employed full time as Essential Services Personnel, and must provide proof of certification/licensure as required by the City.

The total annual income for the household may not exceed \$300,000.

HOUSING ASSISTANCE LOAN REPAYMENT

Loans will be provided at zero percent interest to eligible homebuyer applicants. Loans provided under the program will be provided over a ten- year time frame, with ten percent (10%) of the loan amount being forgiven annually, except the first year, wherein 5% of the loan will be forgiven. The loan is forgivable in its entirety at the end of the ten-year time frame (term) from the date of execution of said mortgage and note, provided the title has remained under the ownership of the individuals signing said mortgage and note as their primary residence or a surviving spouse.

DISPOSITION WITHIN MONTHS OF CLOSING	PERCENTAGE OF LOAN SUBJECT TO REPAYMENT	PERCENTAGE OF LOAN FORGIVEN
1-12	95%	5%
13 — 24	90%	15%
25 -36	80%	20%
37 —48	70%	30%
49 — 60	60%	40%
61— 72	50%	50%
73 — 84	40%	60%
85 — 96	30%	70%
97 —108	20%	80%

Formatted: Line spacing: Exactly 9 pt

109 —121	10%	90%
122 or more	0%	100%

Page 6 of 7
City of Westlake
Housing Assistance Purchase Program Yearly Guidelines

HOUSING ASSISTANCE LIMITS

Purchase assistance will be provided to eligible home buyers on new construction, single-family detached and attached housing units to assist with gap financing, down payment and/or closing costs. **Awards will be provided based upon financial need.** No cash out will be provided to income eligible applicants, only down payment and/or closing cost assistance will be provided.

Commented [GU2]: Suggest seeking City input for highlighted items

Formatted: Font color: Black, Highlight

Formatted: Font color: Black, Highlight

Maximum awards by income category for income-qualified applicants:

Very Low	\$60,000.00
Low	\$45,000.00
Moderate	\$40,000.00
Middle	\$35,000.00

Maximum awards by occupationally qualified applicants: \$25,000; however, if more than one person in a household is employed full time as Essential Services Personnel, the total amount of award may be increased by up to \$10,000 (for a total of up to \$35,000) based on the circumstances of the eligible homebuyer applicant at the discretion of the eCity Manager.

Formatted: Font color: Black, Not Highlight

Formatted: Not Highlight

Maximum loan assistance amounts are based upon established affordability guidelines and creditworthiness as defined by established underwriting guidelines. Underwriting certification will be required.

Formatted: Font color: Black, Highlight

FAIR HOUSING DISCLAIMER

Title VIII of the Civil Rights Act of 1968, as amended in 1988, the Fair Housing Act makes it unlawful to engage in discriminatory practices based on race, color, national origin, religion, sex, familial status or handicap (disability) in the sale, rental, and financing of dwellings and housing related transactions.

Formatted: Line spacing: Exactly 9 pt

Page 7 of 7
City of Westlake
Housing Assistance Purchase Program Yearly Guidelines

| [4884-0843-9242, v. 1](#)

Formatted: Line spacing: Exactly 9 pt

Eligible Occupations for FL Hometown Heroes Loan Program

Please note that only one borrower must qualify with eligible occupation.

All borrower(s) qualifying with one of the eligible occupations below must be employed FULL-TIME and CURRENTLY employed in one of the eligible occupations below. Please note that occupations or job titles/positions that do not appear on this list are not eligible under Hometown Heroes.			
Licensing or Certification Documentation Needed to Confirm Occupation	Included with all eligible occupations listed below. Please reference and request certification or license as indicated with each eligible occupation from borrower(s). Each eligible occupation references the State agency (or other applicable agency) that would be responsible for certification or licensing of that occupation.		
Documentation Needed to Confirm Full-Time Status	A written or verbal VOE indicating full-time employment of 35 hours or more a week must be provided by all borrower(s). If a VOE doesn't reflect 35 hours or more a week, the employer will need to confirm buyer is employed full-time. A VOE is required for all eligible occupations below. Self-Employed borrower(s) may provide a copy of work schedule indicating full-time status or a copy of paystub indicating full-time status or copy of contract or work schedule indicating full-time status.		
Attestation Form required by eligible borrower(s) under HTH	Borrower(s) must execute the Attestation Form indicating eligible occupation unless otherwise noted below.		
Occupations (Job Position/Job Title)	Governing Florida State Agency	Website of Governing Agency (<i>for info on how to obtain a copy of license/certificate</i>).	Governing FL Statute
<ul style="list-style-type: none"> ●Sworn Law Enforcement Officer ●Certified Correction Officer ●Correctional Probation Officer (FLORIDA Officers)	FL Department of Corrections; FL Department of Law Enforcement <i>(for FL Officers)</i>	https://atms.fdle.state.fl.us/atms/officer/Profile.jsf Provide copy of employee's Global Profile Sheet available through website above reflecting active full-time status. This website only permits borrower(s) to access. Include LEO in Attestation Form and include copy of Global Profile Sheet with Attestation Form.	F.S. s 112.531 F.S. s 943.10

<p>Law Enforcement Officers eligible under the Law Enforcement Recruitment Bonus Payment Program</p>	<p>FL Department of Corrections; FL Department of Law Enforcement (for FL Officers)</p>	<p>Law Enforcement Officers (LEOs) deemed eligible for the Law Enforcement Recruitment Bonus Payment Program are exempt from the first-time homebuyer requirement. The LEO should receive a certificate of eligibility signed by the Governor. Provide a copy of the certificate from the Governor and include “N/A” in license and certification section of the Attestation Form.</p>	<p>F.S. s 112.531 F.S. s 943.10</p>
<p> <ul style="list-style-type: none"> ●Sworn Law Enforcement Officer ●Certified Correction Officer ●Correctional Probation Officer <p>(Federal Officer Examples)</p> <ul style="list-style-type: none"> ● FBI ● US Dept. of Homeland Security ● US Marshals Service, US Drug Enforcement Administration ● Bureau of Alcohol, Tobacco & Firearms ● US Immigration & Customs Enforcement </p>	<p>Federal Agencies</p>	<p>License or certification not required for Federal Law Enforcement or Correctional Officers. Provide a copy of VOE validating position of Sworn Law Enforcement Officer, Certified Correction Officer or Correctional Probation Officer from one of the Federal Agencies provided. VOE must include full-time status and employer. Include “N/A” in license and certification section of the Attestation Form.</p>	<p>(N/A)</p>
<p> <ul style="list-style-type: none"> ●Juvenile Detention Officer ●Juvenile Probation Officer </p>	<p>FL Department of Juvenile Justice</p>	<p>https://www.djj.state.fl.us/services/department-support-services/office-of-staff-development-training/sd-t-teams/officer-certification</p> <p>Juvenile Detention & Probation Officers are not required to hold license or certification. Provide copy of VOE validating full-time employment and employer. Include “N/A” in license and certification section of the Attestation Form.</p>	<p>F.S. s 985.66</p>

Firefighter	FL Division of State Fire Marshal within the Department of Financial Services	https://www.citizenserve.com/120/CAPFor120?Action=MyLicenses	F.S. s. 633.102 & F.S. s. 633.408
		Provide copy of Firefighter Certificate of Compliance or Special Certificate of Compliance issued by FL Division of State Fire Marshal. This can only be obtained and provided by the borrower.	
<ul style="list-style-type: none"> ● Certified Paramedic ● Certified Emergency Medical Technician (EMT) 	FL Department of Health	https://mqa-internet.doh.state.fl.us/MQASearchServices/HealthCareProviders	F.S. s 112.1911
		Provide a copy of certification issued by FL Department of Health.	
911 Public Safety Communicator	FL Department of Health	https://mqa-internet.doh.state.fl.us/MQASearchServices/HealthCareProviders	F.S. s 401.465
		Provide a copy of certification issued by FL Department of Health.	
Certified K-12 Educators (Public, Charter Schools) to include: <ul style="list-style-type: none"> ● Classroom Teacher ● Career Specialist ● Librarian/Media Specialist ● School Counselor ● Social Worker ● School Psychologist <i>(Private school educators, as reflected above, are eligible with certification from FL Department of Education.)</i>	FL Department of Education	https://flcertify.fldoe.org/datamart/selectArchType.do	F.S. s 1012.01
		Provide a copy of temporary or professional educator certification issued by FL Department of Education.	
Licensed or Registered Childcare Operator <i>(Owner of Childcare Facility)</i>	FL Department of Children & Families	https://www.myflfamilies.com/service-programs/child-care/training.shtml	F.S. s 402.305
		Provide copy of license or registration issued by FL Department of Children & Families reflecting borrower's position of Childcare Operator.	
Childcare Instructor <i>(employed by a LICENSED childcare facility or</i>	FL Department of Children & Families	https://www.myflfamilies.com/service-programs/child-care/training.shtml	

LICENSED or REGISTERED home childcare provider)		Childcare Instructor is not required to hold license or certification. Provide copy of employer’s license or registration issued by FL Department of Children & Families. Include and indicate “Employer License/Registration” in license and certification section of the Attestation Form.	
<ul style="list-style-type: none"> ●Registered Nurse (RN) ●Licensed Practical Nurse (LPN) ●Advanced Practice Registered Nurse (APRN) ●Certified Registered Nurse Anesthetist ●Clinical Nurse Specialist ●Certified Nurse Midwife 	FL Board of Nursing	https://mqa-internet.doh.state.fl.us/MQASearchServices/HealthCareProviders or for multi-state license here: https://www.nursys.com/LQC/LQCTerms.aspx Provide copy of license issued by FL Dept. of Health or Nursys.com.	F.S. s 464.003 F.S. s 464.008 F.S. s 464.009
Certified Nursing Assistant (CNA)	FL Board of Nursing	https://mqa-internet.doh.state.fl.us/MQASearchServices/HealthCareProviders Provide copy of certification issued through FL Dept. of Health.	F.S. s 464.201 -
Home Health Aide (employed by a LICENSED home health agency)	FL Agency for Health Care Administration	https://www.floridahealthfinder.gov/facilitylocator/facloc.aspx Home Health Aide is not required to hold a license or certification. Provide copy of employer’s license issued by FL Agency for Health Care Administration. Include and indicate “Employer License/Registration” in license and certification section of the Attestation Form.	N/A
Health Care Practitioner to include: <ul style="list-style-type: none"> ●Physician ●Physician Assistant ●Anesthesiologist 	FL Board of Medicine	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home/ Provide a copy of license issued through FL Dept. of Health.	F.S. s 458.305 F.S. s 458.311 F.S. s 458.314 F.S. s 458.347

Anesthesiologist Assistant	FL Board of Medicine	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 458.3475</i>
		Provide a copy of license issued through the FL Dept. of Health.	
Psychiatrist	FL Board of Medicine	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 458.3165</i>
		Provide a copy of license issued through the FL Dept. of Health.	
Certified Medical Assistant	FL Board of Nursing	https://floridasnursing.gov/	<i>F.S. s 458.3485 F.S. s 458.307</i>
		Provide a copy of certificate issued by one of the following: <ul style="list-style-type: none"> ●an accredited national or state medical association ●National Healthcareer Association ●a provider accredited by the National Commission for Certifying Agencies (NCCA) ●American Association of Medical Assistants OR ●entity approved by FL Board of Medicine. 	
Acupuncturist	FL Board of Acupuncture	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s. 457.102</i>
		Provide a copy of license through the FL Dept. of Health	
Osteopathic Physician	FL Board of Osteopathic Medicine	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 459.003</i>
		Provide a copy of license issued through the FL Dept. of Health.	
Chiropractic Physician	FL Board of Chiropractic Medicine	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 460.403</i>
		Provide a copy of license issued through the FL Dept. of Health.	
Certified Chiropractic Physician's Assistant		https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 460.4165</i>
		Provide a copy of certificate through the FL Dept. of Health.	

Podiatric Physician	FL Board of Podiatric Medicine	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 461.003</i>
		Provide a copy of license issued through the FL Dept. of Health	
Certified Podiatric X-Ray Assistant		https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 461.0135</i>
		Provide a copy of certificate issued through the FL Dept. of Health.	
Naturopathic Physician	FL Board of Medicine	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 462.01</i>
		Provide copy of license issued through the FL Dept. of Health.	
● Pharmacist ● Nuclear Pharmacist	FL Board of Pharmacy	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 465.003</i> <i>F.S. s 465.0126</i> <i>F.S. s 465.014</i>
		Provide copy of license issued through the FL Dept. of Health.	
Pharmacy Technician	FL Board of Pharmacy	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	
		Provide copy of registration through the FL Dept. of Health.	
● Dentist ● Dental Hygienist	FL Board of Dentistry	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 466.003</i>
		Provide copy of license issued through the FL Dept. of Health.	
Dental Assistant	FL Board of Dentistry	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s466.003</i>
		Dental Assistant is not required to hold license or certification. Provide copy of VOE or letter from employer validating supervisor is a licensed Dentist. <i>Include "N/A" in license and certification section of the Attestation Form.</i>	

Speech Language Pathologist or Audiologist	FL Department of Health; FL Board of Speech-Language Pathology & Audiology	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 468.1105 F.S. s 468.1125 F.S. s 468.1185
		Provide copy of license issued through the FL Dept. of Health.	
Speech-Language Pathology Assistant or Audiologist Assistant	FL Department of Health; FL Board of Speech-Language Pathology & Audiology	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	
		Provide a copy of certification issued through FL Dept. of Health.	
Nursing Home Administrator	FL Board of Nursing Home Administrators	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 468.1655
		Provide copy of license issued through FL Dept. of Health.	
●Occupational Therapist ●Occupational Therapist Assistant	FL Board of Occupational Therapy Practice	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home /	F.S. s 468.203
		Provide copy of license issued through FL Dept. of Health.	
Occupational Therapist Aide	FL Board of Occupational Therapy Practice	https://floridasoccupationaltherapy.gov/licensing/	F.S. s 468.203
		Occupational Therapist Aide is not required to hold a license or certification. Provide copy of VOE or letter from employer validating supervisor is a licensed Occupational Therapist or Occupational Therapist Assistant. Include "N/A" in the license and certification section of Attestation Form.	
●Certified Respiratory Therapist ●Registered Respiratory Therapist	FL Department of Health; FL Board of Respiratory Care	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 458.358
		Provide copy of license issued through FL Dept. of Health.	
●Licensed Dietician or Nutritionist	FL Department of Health	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 468.503 F.S. s.468.509 F.S. s 468.51

●Licensed Nutrition Counselor		Provide copy of license issued by FL Department of Health.	
Registered Dietician or Nutritionist	FL Department of Health; FL Commission on Dietetic Registration	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 468.503 F.S. s.468.509 F.S. s 468.51
		Provide copy of registration issued through the FL Dept. of Health.	
Dietetic Technician	FL Department of Health	https://www.floridahealth.gov/licensing-and-regulation/dietetic-nutrition/index.html	
		Dietetic Technician is not required to hold a license or certification. Provide copy of VOE or letter from employer validating supervisor is a Licensed Practitioner, Licensed Dietician or Nutritionist or Licensed Nutrition Counselor. Include “N/A” in the license and certification section of Attestation Form.	
Athletic Trainer	FL Department of Health FL Board of Athletic Training	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 468.701 F.S. s.468.707
		Provide copy of license issued through the FL Dept. of Health.	
●Prosthetist ●Orthotist ●Prosthetist Orthotist ●Pedorthist ●Prosthetist ●Orthotic Fitter ●Orthotic Fitter Assistant	FL Board of Orthotists & Prosthetists	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home /	F.S. s 468.80
		Provide copy of license issued through the FL Dept. of Health.	
Electrologist	FL Department of Health	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 478.42 F.S. s 478.45
		Provide copy of license issued by FL Department of Health.	
Massage Therapist	FL Board of Massage Therapy	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 480.033
		Provide copy of license issued through the FL Dept. of Health.	

Clinical Laboratory Personnel to include: <ul style="list-style-type: none"> ● Laboratory Director ● Supervisor ● Technologist ● Blood-Gas Analyst ● Laboratory Testing Technician 	FL Board of Clinical Laboratory Personnel	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 483.803</i> <i>F.S. s 483.809</i>
		Provide copy of license issued through the FL Dept. of Health.	
Phlebotomist <i>(employed as a full-time phlebotomist and has successfully completed an accredited phlebotomy course)</i>	FL Board of Clinical Laboratory Personnel	https://floridasclinicallabs.gov/licensing/	<i>F.S. s 483.803</i> <i>(N/A)</i>
		Phlebotomist is not required to hold a license or certification. Provide confirmation of CURRENT employment as a Phlebotomist and proof of COMPLETED ACCREDITED PHLEBOTOMY COURSE. Include “N/A” in the license and certification section of Attestation Form.	
Licensed Medical Physicist (Radiologic) which works with diagnostic application and safe use of x-rays, ultrasonic radiation or magnetic fields.	FL Department of Health	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 483.901</i>
		Provide copy of license issued by FL Department of Health.	
<ul style="list-style-type: none"> ● Certified Basic X-Ray Machine Operator ● Certified Radiologic Technologist ● Certified Radiology Assistant ● Certified General Radiographer ● Specialty Technologist (Radiologic) 	FL Department of Health	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 468.301</i> <i>F.S. s 468.302</i> <i>F.S. s 468.304</i>
		Provide copy of certificate issued by FL Department of Health.	
Genetic Counselor	FL Department of Health	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 483.913</i> <i>F.S. s 483.914</i>
		Provide copy of license issued by FL Department of Health.	
Optician	FL Board of Opticianry	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	<i>F.S. s 484.002</i>

		Provide copy of license issued through the FL Dept. of Health.	
Optician Apprentice	FL Board of Opticianry	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	
		Provide copy of registration issued through the FL Dept. of Health.	
Certified Optometrist	FL Board of Optometry	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 463.002
		Provide copy of license issued through the FL Dept. of Health.	
Hearing Aid Specialist	FL Board of Hearing Aid Specialists	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 484.041
		Provide copy of license issued through the FL Dept. of Health.	
Hearing Aid Specialist Trainee	FL Board of Hearing Aid Specialists	https://floridashearingaidspecialists.gov/licensing/	
		Hearing Aid Trainee is not required to hold a license or certification. Provide copy of VOE or letter from employer validating supervisor is a Licensed Hearing Aid Specialist. Include “N/A” in the license and certification section of Attestation Form.	
●Physical Therapist ●Physical Therapist Assistant	FL Board of Physical Therapy	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 486.021
		Provide copy of license issued through the FL Dept. of Health.	
●Psychologist ●School Psychologist	FL Board of Psychology	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 490.003
		Provide copy of license issued through FL Dept. of Health	
●Clinical Social Worker ●Marriage & Family Therapist ●Mental Health Counselor	FL Board of Clinical Social Work, Marriage & Family Therapy & Mental Health Counseling	https://mqa-internet.doh.state.fl.us/MQASearchServices/Home	F.S. s 491.003
		Provide copy of license issued through FL Dept. of Health.	
●Child Protective Services’ Enforcement	FL Department of Children &	Child Protective Services’ Enforcement & Adult Protective Services’ Enforcement employees with DCF are	F.S. s 402.402 (N/A)

●Adult Protective Services' Enforcement	Family Services	not required to hold a State of FL license or certification. Provide copy of VOE or letter from employer validating employment with DCF. Include "N/A" in the license and certification section of Attestation Form.	F.S. s 415.102 (N/A)
Veterinarian	FL Board of Veterinary Medicine	https://www.myfloridalicense.com/wl11.asp?mode=0&SID= Provide copy of license issued through the FL Department of Business and Professional Regulation.	F.S. s 474.202 F.S. s 474.207
Veterinarian Assistant or Technician <i>*(employed by a permanent or mobile veterinary practice)</i>	FL Board of Veterinary Medicine	http://www.myfloridalicense.com/DBPR/veterinary-medicine/board-information/ Veterinarian Assistants and Technicians are not required to hold a State of FL license or certification. Provide copy of VOE or letter from employer validating employment with a permanent or mobile veterinary practice. Include "N/A" in the license and certification section of Attestation Form.	F.S. s 474.202 (N/A)
Assistant Public Defender	FL Justice Administration Commission	Provide copy of VOE or letter from employer validating employment. License/certification for Assistant Public Defender is not required. (Include "N/A" in the license and certification section of Attestation Form).	F.S. s. 27.53 (N/A) F.S. s 790.25 (N/A)
Assistant State Attorney	Attorney General	Provide copy of VOE or letter from employer validating employment. License/certification for Assistant State Attorney is not required. (Include "N/A" in the license and certification section of Attestation Form).	F.S. 27.18 (N/A) F.S. 27.181 (N/A)
Assisted Living Facility Administrator	Agency for Healthcare Administration	https://www.floridahealthfinder.gov/facilitylocator/facloc.aspx https://alfmacdonald-research.com/SuccessfulExamineesList.aspx Provide copy of verification of employer's (Assisted Living Facility's) registration confirming Administrator's name through ACHA's website above.	F.S. 429.02 F.S.429.07

		Also provide confirmation of receipt of ALF Gold-Leaf Certificate of Achievement from The MacDonald Research Institute (TMRI) website above.	
Active Military Personnel & Veterans <i>(formerly the Salute Our Soldiers Program)</i>			
Active-Duty Military and Veterans are NOT required to qualify with an eligible occupation above. Active-Duty Military and Veterans qualify based on their military service only.			
Active Military Personnel	<ul style="list-style-type: none"> ●Active-duty personnel from the military (Air Force, Army, Coast Guard, Marine Corps, National Guard, Space Force or the Reserves) are exempt from the First Time Homebuyer Requirement. ●Must provide a copy of his/her LES or copy of their SRCA to validate eligibility. ●<i>(Include "N/A" in the license and certification section of Attestation Form).</i> 		
Veterans	<ul style="list-style-type: none"> ●Veterans are exempted from the First Time Homebuyer Requirement when they provide a valid DD-214 that reflects discharge status as other than dishonorable. ●Surviving spouse may participate in a VA first mortgage ONLY when providing a valid Certificate of Eligibility (COE). ●<i>(Include "N/A" in the license and certification section of Attestation Form).</i> 		