



AGENDA
Special, Workshop & Town Hall City Council Meeting
Monday, May 18, 2026, 6:00 P.M.
Council Chambers, 116 First Street, Neptune Beach, Florida

1. CALL TO ORDER / ROLL CALL / PLEDGE OF ALLEGIANCE
2. PUBLIC COMMENTS
3. REQUESTS FOR CONSIDERATION:
 - A. Northeast Florida Utility Coordinating Group (NFUCG) Memorandum of Agreement (MOA) p. 3
 - B. Development Impact Fee Study Request for Proposals 2026-01 (RFP) Recommendation p. 20
4. ADJOURN

WORKSHOP CITY COUNCIL MEETING IMMEDIATELY FOLLOWING
THE ABOVE SPECIAL MEETING

1. CALL TO ORDER / ROLL CALL
2. AWARDS / PRESENTATIONS / RECOGNITION OF GUEST
 - A. National Public Works Week Proclamation – May 17-23, 2026 p. 101
3. PUBLIC COMMENTS
4. PROPOSED ORDINANCES:
 - A. PROPOSED ORDINANCE: An Ordinance of the City of Neptune Beach, Florida, Amending the Code of Ordinances, Section 18-3, Special Events, Article I, Chapter 18 Streets, Sidewalks and Other Public Places; Providing Codification, Conflicts, Severability, and Providing an Effective Date p. 102
5. CONTRACTS / AGREEMENTS / NONE
6. ISSUE DEVELOPMENT
 - A. Community Redevelopment Area (CRA) Consulting Services Request for Proposals 2026-02 (RFP) Discussion p. 109
7. PUBLIC COMMENTS
8. COUNCIL COMMENTS
9. ADJOURN

TOWN HALL
IMMEDIATELY FOLLOWING THE ABOVE WORKSHOP

1. CALL TO ORDER / ROLL CALL
2. PUBLIC COMMENTS – OPEN TOPICS
3. ADJOURN

In accordance with Section 286.0105, Florida Statutes, any person desirous of appealing any decision reached at this meeting may need a record of the proceedings. Such person 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.

In accordance with the Americans with Disabilities Act and Section 286.26, Florida Statute, persons with disabilities needing special accommodation to participate in this meeting should contact the City Clerk's Office at least 48 hours prior to the meeting.



**Special Meeting
Agenda Item #3A
NFUCG MOA**

**CITY OF NEPTUNE BEACH
CITY COUNCIL MEETING
STAFF REPORT**

AGENDA ITEM:	Special Meeting Agenda Item #3A , Northeast Florida Utility Coordinating Group (NFUCG) Memorandum of Agreement (MOA)
SUBMITTED BY:	City Manager Richard Pike
DATE:	May 13, 2026
BACKGROUND:	<p>The Northeast Florida Utility Coordinating Group (NFUCG) Memorandum of Agreement (MOA) is a cooperative agreement among multiple water utilities in Northeast Florida. It is designed to allow these entities to work together, speak with a unified voice to regulatory agencies, and share the costs of critical studies, such as groundwater and surface water modeling.</p> <p>The agreement focuses on assessing groundwater resource sustainability in Northeast Florida. The group consists of 9 utilities that serve over a million people in the region. The original MOA was established in 2011 and has been renewed periodically, including versions in 2014, 2017, and 2020. The group compiles data, performs water modeling, and presents strategies regarding resource management, such as the 2020 MOA aimed at addressing water supply issues.</p>
RECOMMENDATION:	Approve the NFUCG MOA
ATTACHMENT:	NFUCG MOA

**MEMORANDUM OF AGREEMENT
BETWEEN
CITY OF ATLANTIC BEACH, CLAY COUNTY UTILITY AUTHORITY, CITY OF
GAINESVILLE, CITY OF JACKSONVILLE BEACH, JEA, CITY OF NEPTUNE
BEACH, TOWN OF ORANGE PARK, AND ST. JOHNS COUNTY
TO ASSESS GROUNDWATER RESOURCE SUSTAINABILITY IN NORTHEAST
FLORIDA**

WHEREAS, the St. Johns River Water Management District (SJRWMD) and the Suwannee River Water Management District (SRWMD) are undertaking and continuing water supply planning processes using growth projections, groundwater and resource impact models, and other technical tools that will affect local governments and utilities throughout the region and specifically developing MFL Prevention and Recovery Plans that local governments and utilities may be a participant; and

WHEREAS, the City of Atlantic Beach, Clay County Utility Authority, City of Gainesville, City of Jacksonville Beach, JEA, City of Neptune Beach, Town of Orange Park, and St. Johns County (hereinafter referred to as "OWNERS"), desire to jointly and collaboratively evaluate regional long-term sustainability of groundwater resources to meet future public water supply needs relative to the St. Johns River Water Management District's (SJRWMD) and Suwannee River Water Management District's (SRWMD) water supply planning processes; and

WHEREAS, the OWNERS support protecting and sustaining the natural systems and groundwater resources; and

WHEREAS, the OWNERS have a responsibility to provide cost effective public water supply alternatives; and

WHEREAS, it is more efficient for the OWNERS to cost share in this effort and to avoid duplication of effort; and

WHEREAS, the OWNERS need to engage engineering consultants and legal support services and desire to designate JEA to administer these contracts; and

WHEREAS, pursuant to Section 21.04(t) of the City of Jacksonville Charter, JEA is authorized to provide the services described herein; and

WHEREAS, the OWNERS have agreed to enter into this agreement (the "Agreement") for the purpose of setting forth the terms and conditions which will govern their mutual obligations in furtherance of the foregoing Recitals; and

NOW, THEREFORE, the OWNERS and JEA agree as follows:

1. The foregoing Recitals are true and correct and are incorporated herein by this reference to the same.

2. Services. JEA hereby agrees to administer consultant and legal services contracts for the OWNERS as described in the Scope of Services (the "Scopes"), which will be attached as consultant Exhibit A hereto, after being approved and finalized by JEA and all OWNERS, and which shall become a part hereof when attached hereto. The OWNERS and JEA understand that Exhibit A may be modified and/or additional Scopes may be added at a future date, in accordance with the provisions set forth in paragraphs 4, 6 and 8 herein. In the role of administrator of the consultant and legal contracts, JEA will (1) act as the primary contact for the contracts, (2) will relay the prioritization of tasks as set by the OWNERS, (3) coordinate progress meetings and other activities relating to project status and (4) pay the invoices submitted by the consultants, subject to the reimbursement of the costs by the other OWNERS, in the percentages as set forth in paragraph 6 herein.

3. Limitations. Prioritization of tasks included in the Scopes and overall direction to consultant and legal service providers will be determined jointly by the OWNERS. Decisions will require a majority vote of the OWNERS before JEA directs consultants accordingly. Each OWNER will have one vote. JEA will coordinate regular progress meetings for conference calls and meetings with consultant and legal service providers to provide OWNERS with project status updates and obtain OWNER votes, as needed.

4. Costs. OWNERS shall be limited to an overall, combined total cost not to exceed \$1,500,000 over the term of this Agreement (the "Total Costs Amount") as presented in Table 1. These costs are anticipated to be incurred at approximately \$500,000 per year for each of the three (3) years of the Agreement (Fiscal Years 2027, 2028, and 2029). Exhibit A contains a draft scope of services for these activities. This scope will be updated and adjusted as needed by the committee. Decisions to add additional services within the Scopes, but subject to and limited by the Total Costs Amount, will require at least a majority vote of the OWNERS. The addition of Scopes above the Total Costs Amount will require written modification of this Agreement and the approval of a majority of the OWNERS. In the event that additional Scopes above the Total Costs Amount are so approved, any dissenting OWNER may elect to withdraw from this Agreement in accordance with the requirements of paragraph 10 hereof.

5. Effective Date. The Effective Date of this Agreement shall be October 1, 2026.

6. Reimbursement of Expenses. OWNERS will reimburse JEA on up to a monthly basis and within 30 days of invoicing by JEA in consideration of this Agreement based on actual costs incurred during the preceding period. Costs to each OWNER will be paid proportionally to each utility's 2025 total annual average daily flow for the duration of this Agreement, as follows:

Table 1: Percentage Reimbursement and Cost

Owner	2025 Flow AADF (MGD)	Reimbursement (%)	Total Annual Cost	Total Cost Amount
City of Atlantic Beach	2.3	1.22%	\$6,108	\$18,323
Clay County Utility Authority	12.95	6.88%	\$34,388	\$103,165
City of Gainesville	23.91	12.70%	\$63,492	\$190,477
City of Jacksonville Beach	2.56	1.36%	\$6,798	\$20,394
JEA	128.92	68.47%	\$342,344	\$1,027,033
City of Neptune Beach	0.91	0.48%	\$2,416	\$7,249
Town of Orange Park	0.98	0.52%	\$2,602	\$7,807
St. Johns County	15.76	8.37%	\$41,850	\$125,551
Total	188.29	100.00%	\$500,000	\$1,500,000

Note: AADF is annual average daily flow

JEA will not charge OWNERS any additional fees for contract administration. If any OWNER fails to reimburse JEA for its percentage share, interest shall be assessed at the rate of 8% per year. If an OWNER fails to pay its percentage share for two (2) consecutive months, this MOA shall be void as between JEA and such Defaulting OWNER. Defaulting OWNER shall thereafter cease to be a part of the OWNERS group, and shall not be entitled to attend any meetings, have any vote on matters, and obtain any information or reports prepared by consultants. The Defaulting OWNER shall continue to be liable to JEA for payment of its percentage share of the costs incurred, plus accrued interest, but the defaulting OWNER shall not be liable for any cost or expenses from the date it is no longer a part of the OWNERS group. If an OWNER defaults or separates from the group in accordance with paragraph 10, JEA shall re-allocate the reimbursement percentages set forth above, and each OWNER shall thereafter be responsible for the revised percentage of the fees.

In lieu of cost reimbursement, JEA may allow OWNERS to provide in-kind services, on a case-by-case basis, and as unanimously agreed by OWNERS when said in-kind services have or will directly support and offset costs of the Scopes within the limitations of the Total Costs Amount in paragraph 4 above and any approved additional services.

7. Notification. Correspondence to JEA, project administration questions, and payment, as well as any other notice, shall be directed as follows:

Lindsay Starner
 Director, Policy and Regulation
 225 N Pearl St.
 Jacksonville, FL 32202
 (904) 304-5206
 scholn@jea.com

Notices to and from the other OWNERS and voting shall be made by the following individuals, or a designee of each respective OWNER, at the addresses shown:

<p>Troy Stephens Public Utilities Director 902 Assisi Land Jacksonville, FL 32233 904-247-5875 tstephens@coab.us</p>	<p>Deryle Calhoun Director of Public Works 2010 Forest Avenue Neptune Beach, FL 32266 (904) 242-5766 dcalhoun@nbfl.us</p>
<p>Jeremy Johnston Executive Director Clay County Utility Authority 3176 Old Jennings Road Middleburg, Florida 32068 (904) 272-5999 jjohnston@clayutility.org</p>	<p>Kyle Croce Public Works Director 2042 Park Avenue Orange Park, FL 32073 (904) 264-7411 kcroce@townop.com</p>
<p>Rick Hutton Principal Engineer Gainesville Regional Utilities 4747 N Main Street Gainesville, FL 32609 (904) 393-1612 huttonrh@gru.com</p>	<p>Neal Shinkre Utility Director 1205 SR 16 St. Augustine, FL 32084 (904) 209-2700 nshinkre@sjcfl.us</p>
<p>Kayle Moore Engineer City of Jacksonville Beach 1460A Shetter Avenue Jacksonville Beach, Florida 32250 (904) 247-6219 kmoore@jaxbchfl.net</p>	

8. Modification. This Agreement may be modified only upon mutual, written agreement signed by all of the OWNERS.

9. Additional Parties as OWNERS. OWNERS may be added to the Agreement in the future. Decisions to add additional OWNERS will require at least a majority vote of the OWNERS. If an OWNER is added, JEA shall re-allocate the reimbursement percentages set

forth in paragraph 6 above, and each OWNER shall thereafter be responsible for the revised percentage of the fees. OWNERS may also agree to allow participation of other entities in this collaborative effort without becoming an OWNER and at no cost, but only after unanimous agreement by OWNERS.

10. Separation. Any OWNER may withdraw from this Agreement before termination by giving not less than 30 days' written notice to all OWNERS. In the event of withdrawal, the withdrawing OWNER shall be responsible for its share of all services up to the date of termination plus its remaining share of active phase(s) of work being performed under the Scopes. Payment in full for the remaining balance shall be due within thirty (30) days of separation. The withdrawing OWNER will not be responsible for costs associated with any phases of the Scopes not yet started and future costs for phases not yet started will be redistributed among the remaining OWNERS within the limitations of the Annual Cost and Total Cost Amount OWNER allocation described above.

11. Execution. This Agreement may be executed in multiple counterparts, each of which shall be considered an original document for all purposes.

12. Termination. This Agreement shall terminate on September 30, 2029 or upon the completion of the Scopes, whichever shall first occur, unless terminated earlier by the procedures set forth herein. In the event of termination before completion of the Scopes, the OWNERS shall be responsible for their respective shares of services performed to the date of termination, and no compensation previously paid for services performed in accordance with this Agreement shall be refundable by JEA.

AGREED TO on this ___ day of _____, _____

Signature Pages Follow

DATE:

CITY OF ATLANTIC BEACH

Kevin Hogencamp
Interim City Manager
City of Atlantic Beach
800 Seminole Rd.
Atlantic Beach, Florida 32233

DATE:

CLAY COUNTY UTILITY AUTHORITY

Jeremy Johnston
Executive Director
Clay County Utility Authority
3176 Old Jennings Road
Middleburg, Florida 32068

DATE:

CITY OF GAINESVILLE

Debbie Daugherty
Water/Wastewater Officer
Gainesville Regional Utilities
301 SE 4th Avenue
Gainesville, Florida 32601

DATE:

CITY OF JACKSONVILLE BEACH

Mike Staffopoulos
City Manager
City of Jacksonville Beach
11 North Third Street
Jacksonville Beach, Florida 32250

DATE:

JEA

Lindsay Starner
Director, Policy and Regulation
JEA
225 N Pearl St
Jacksonville, FL 32202

DATE:

CITY OF NEPTUNE BEACH

Richard Pike
City Manager
City of Neptune Beach
116 First Street
Neptune Beach, Florida 32266

DATE:

TOWN OF ORANGE PARK

Joe Taylor
Town Manager
Town of Orange Park
2042 Park Avenue
Orange Park, Florida 32073

DATE:

ST. JOHNS COUNTY

Brad Bradley
Deputy County Administrator
St. Johns County
500 San Sebastian View
St. Augustine, Florida 32084

Exhibit A: General Scope of Support Services

Proposed Workplan

The following tasks are expected to be completed by engineering consultants over the next 3 years on behalf of NFUCG. This workplan is a general guide to the activities that are likely to occur over the next several years and does not represent a detailed scope of work. Detailed scopes will be developed as the water supply planning process evolves and new information necessitates engaging the technical services of engineering consultants.

Task 1. Continue Participation in Lower Santa Fe and Ichetucknee River MFLs and Prevention/Recovery

MFLs and associated recovery and prevention strategies for the Lower Santa Fe and Ichetucknee Rivers (LSFIR) will go into effect in July 2026. The NFUCG will continue participation in these processes as they are implemented. For example, as strategies are proposed the NFUCG may analyze their impact on the LSFIR and member utilities. The effort could include compiling data for performing groundwater and surface water modeling, proposing recommended strategies and presenting results as necessary to NFUCG and the working group. The effort also includes evaluation of proposed regulatory strategies and their effect on the NFUCG.

Task 2. Review Other MFLs Proposed by SRWMD, Including the Suwannee River

SRWMD has initiated MFL development for major waterbodies and springs in the Suwannee River Basin. As such, these MFLs could have a significant potential impact on the NFUCG. The purpose of this task is to have technical resources review interim and final work products and to participate in public information meetings.

Task 3. Provide Technical Resources to the Development of Future Groundwater and MFL Modeling Tools

The following primary tasks require technical services for NFUCG to understand and participate in the development and application of updated groundwater modeling tools being created by SJRWMD and SRWMD.

Task 3.1 Review Updates to the Northeast Florida Southeast Georgia (NFSEG) Regional Groundwater Model

The St. Johns River Water Management District (SJRWMD), Suwannee River Water Management District (SRWMD), and Southwest Florida Water Management District (SWFWMD) have developed a regional groundwater flow model, the NFSEG v1.1 Model. The purpose of this task is to continue providing technical services for NFUCG to understand and participate in developing the next version of the NFSEG regional groundwater flow model. This effort includes documenting findings, presenting findings to NFUCG, and meeting with SJRWMD to incorporate comments. It also includes participating in the peer review of the NFSEG model which is underway.

Task 4. Participate in Development of North Florida Regional Water Supply Plan (NFRWSP)

SJRWMD and SRWMD previously initiated the development of the NFRWSP, a joint regional water supply plan that identified sustainable water supply for reasonable water uses in North Florida through 2035 while protecting the water resources and environment of the region. The NFRWSP was approved in 2023 and is anticipated to be updated by the end of 2028. The purpose of this task is to provide technical resources to the NFUCG to evaluate the NFRWSP as the work to update it starts in 2026.

Task 5. Document and Communicate Major Finding to NFUCG

Information must be documented and communicated throughout this process. The consultant will prepare meeting minutes and develop supporting materials to record major findings and decision points related to the previous tasks. These findings will be distributed to NFUCG and presented at status meetings.

Strategic & Legal Support Services to NFUCG

Proposed Workplan

In addition to technical assistances, the NFUCG recognizes the need for strategic and legal expertise. The workplan for these activities are not easily defined at this time, but will generally consist of legal interpretation and representation regarding the following:

1. Water Supply Planning
2. Minimum Flows and Levels
3. Rule-making
4. Legislative Rules and Requirements
5. Permitting and Implementation
6. General Guidance



**CITY OF NEPTUNE BEACH
CITY COUNCIL MEETING
STAFF REPORT**

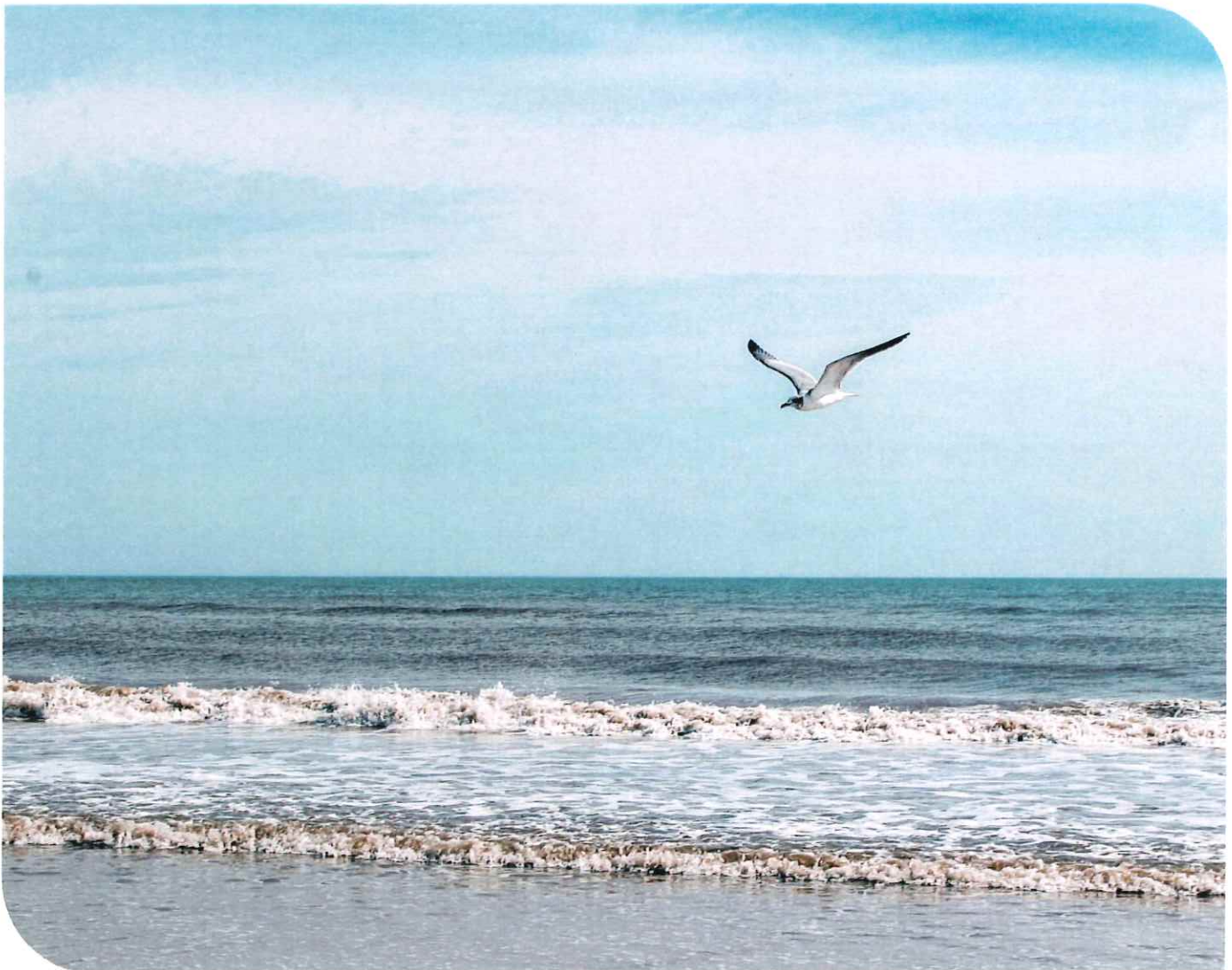
AGENDA ITEM:	Special Meeting Agenda Item #3B REQUEST FOR PROPOSAL (RFP) Development Impact Fee Study – 2026-01
SUBMITTED BY:	Heather Whitmore, AICP, PTP, Community Development Director
DATE:	May 18, 2026
BACKGROUND:	<p>The City of Neptune Beach, Florida (City) has reviewed competitive sealed proposals from qualified and experienced firms to provide professional services related to the evaluation of and recommendation of a growth-related Impact Fees Study for Police Protection, Water, Wastewater, Transportation, Public Facilities and Administration costs due to growth.</p> <p>The Consultant will work with City Staff and City Attorney to collect data and develop additional data required to fully support a comprehensive Impact Fees Study, which recommends an economically and legally supportable set of impact fees to offset the growth related to Police Protection, Public Facilities and Administration impacts due to growth. The Consultant must provide an Impact Fees Study and Plan that complies with the Florida Impact Fees Act (Florida Statutes 2026).</p> <p>Below is an outline of the scope of work desired from the selected Consultant and required information to be included in the compiled Impact Fees Study and Plan produced by the Consultant:</p> <ul style="list-style-type: none"> • Collection and assessment of recent, localized data (with assistance from City staff) (F.S. 163.31801(4)(a)). Study with validated data 12 months old. • Demonstrate extraordinary circumstances of need justifying impact fee. • Preparation of an appropriate impact fees determination methodology and fee assessment schedule, including recommendations on the “phase-in” for impact fee increases required by Section 163.31801(6)(a-g), F.S. (and a comparison with surrounding or comparable cities to ensure reasonableness, consistency and feasibility). • Recommendation of impact fees that are proportional and reasonably connected to, or have a rational nexus with the need for additional capital facilities and the increased impact generated by the new residential or nonresidential/commercial construction (F.S. 163.31801(4)(f)).

	<ul style="list-style-type: none"> • Recommendation of impact fees that are proportional and reasonably connected to, or have a rational nexus with, the expenditures of the funds collected and the benefits accruing to the new residential or nonresidential/commercial construction (F.S. 163.31801(4)(g). • Review and recommendations for ensuring that revenues generated by impact fees are not used, in whole or in part, to pay existing debt or for previously approved projects unless the expenditures are reasonably connected to, or have a rational nexus with, the increased impacts generated by new residential or nonresidential/commercial construction (F.S. 163.31801(4)(i). • A determination of accounting policies that ensure that revenues and expenditures of collected fees are held in separate accounting funds (F.S. 163.31801(4)(b).
RECOMMENDATION:	Recommended vendor is Raftelis
ATTACHMENT:	<p>Ex A) Raftelis response to REQUEST FOR PROPOSAL (RFP) Development Impact Fee Study 2026-01</p> <p>Ex B) REQUEST FOR PROPOSAL (RFP) Development Impact Fee Study 2026-01 – Scoring sheets</p>

City of Neptune Beach

Impact Fees Study

PROPOSAL / RFP #2026-01 / MAY 1, 2026



I am authorized to legally bind the company. We appreciate this opportunity to submit this proposal to the City on this important project and believe our proposed project team has the experience and expertise to successfully deliver the required impact fee consulting services to the City. If you have any questions about this proposal, please do not hesitate to contact us with the following contact information:

Henry Thomas, Senior Vice President (Project Director)
341 N. Maitland Avenue, Suite 300, Maitland, FL 32751
O: 407.628.2600 / E: hthomas@raftelis.com / F: 828.484.2442

Shawn Ocasio, Senior Manager (Project Manager)
341 N. Maitland Avenue, Suite 300, Maitland, FL 32751
O: 407.628.2600 / E: socasio@raftelis.com / F: 828.484.2442

Sincerely,



Henry Thomas
Senior Vice President



Shawn Ocasio
Senior Manager



Giving back

The Raftelis Charitable Gift Fund seeks to make a difference on issues that matter to our clients and employees by helping build sustainable, inclusive communities locally and worldwide. We do this by allocating company profits and employee contributions of time and money. We support organizations that:

- Promote efficient, sustainable resource use
- Advance diversity, equity, and inclusion within the public sector
- Invest in access to clean water and sanitation
- Help vulnerable communities by addressing affordability issues



Raftelis is registered with the U.S. Securities and Exchange Commission (SEC) and the Municipal Securities Rulemaking Board (MSRB) as a Municipal Advisor.

Registration as a Municipal Advisor is a requirement under the Dodd-Frank Wall Street Reform and Consumer Protection Act. All firms that provide financial forecasts that include assumptions about the size, timing, and terms for possible future debt issues, as well as debt issuance support services for specific proposed bond issues, including bond feasibility studies and coverage forecasts, must be registered with the SEC and MSRB to legally provide financial opinions and advice. Raftelis' registration as a Municipal Advisor means our clients can be confident that Raftelis is fully qualified and capable of providing financial advice related to all aspects of financial planning in compliance with the applicable regulations of the SEC and the MSRB.

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Photo on cover courtesy of Haley Hogan (Unsplash)

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FIRM OVERVIEW AND EXPERIENCE

Who is Raftelis

HELPING LOCAL GOVERNMENTS AND UTILITIES THRIVE

Local government and utility leaders partner with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 850 organizations in the last year alone.

We believe that Raftelis is the *right fit* for this project. We provide several key factors that will benefit the City and help to make this project a success.

RESOURCES & EXPERTISE: This project will require the resources necessary to effectively staff the project and the skillsets to complete all of the required components. With more than 190 consultants, Raftelis has one of the nation's largest and most experienced local government financial and management consulting practices. Our team includes experts in impact fee development, capital improvement planning, stakeholder engagement, and data analytics. Our depth of resources allows us to provide the technical expertise necessary to meet your objectives.

DEFENSIBLE RECOMMENDATIONS: When your elected officials and the development community are considering the validity of recommended changes, they must be confident the fees are legally defensible and methodologically sound. Our staff are experts in the application of the dual rational nexus test and state statutory requirements governing impact fees. Being actively involved in shaping industry standards allows us to keep the City informed of emerging trends and ensures our recommendations are rooted in sound principles that withstand scrutiny.

HISTORY OF SIMILAR SUCCESSES: An extensive track record of past similar work will help to avoid potential pitfalls on this project and provide the know-how to bring it across the finish line. Raftelis staff have assisted hundreds of local governments and special districts throughout the U.S. with impact fee and financial consulting services to address wide-ranging growth and infrastructure needs. Our extensive experience allows us to provide innovative recommendations and guarantees that industry best practices are incorporated into your fee structure.

USER-FRIENDLY MODELING: A transparent, easy-to-use modeling tool is critical for ongoing financial planning. Raftelis develops sophisticated yet user-friendly impact fee models that allow staff to examine different policy options, growth projections, capital funding scenarios, and fee design methods in real time.

FEES THAT ARE ADOPTED: For the study to be a success, the impact fees must be successfully approved and implemented. Even the most comprehensive study is of little use if the recommendations are not approved and implemented. Raftelis has assisted numerous agencies in successfully navigating the adoption process. We focus on effectively communicating the financial rationale and statutory compliance to elected officials, the development community, and the public to ensure stakeholder buy-in and successful fee adoption.

33 years
serving the
public sector

How we stack up

OUR TEAM INCLUDES

190+ consultants focused on
finance/management/communication/
technology for the public sector

2 chairs & **16** members of
AWWA and WEF utility finance and
management committees and subcommittees

RAFTELIS HAS PROVIDED ASSISTANCE FOR

2,000+ public agencies
and utilities

that serve more than

50% of the
U.S. population

including the agencies serving

41 of the nation's
50 largest cities

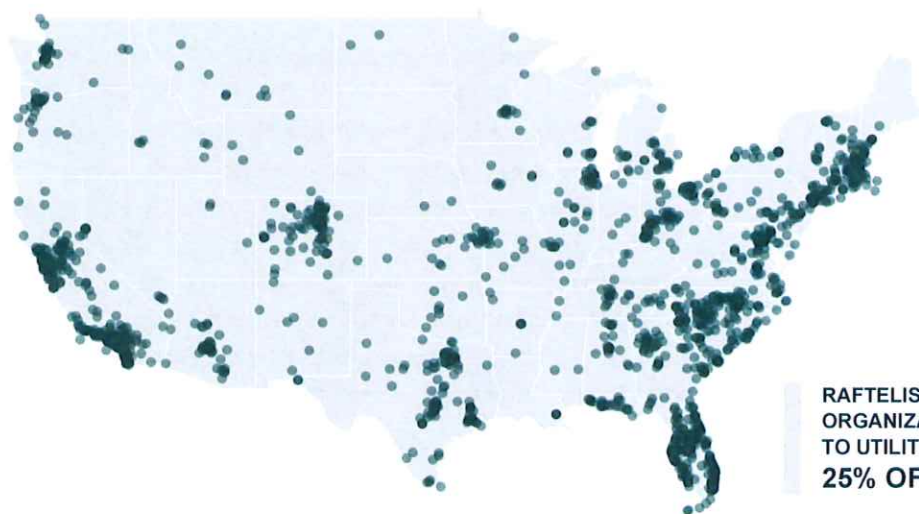
in the past year alone, we worked on

1,400+ projects for **850+** agencies in **46** states

Experience

RAFTELIS HAS THE MOST EXPERIENCED PUBLIC UTILITY FINANCIAL AND MANAGEMENT CONSULTING PRACTICE IN THE NATION.

Our staff has assisted more than 2,000 local government agencies and utilities across the U.S., including some of the largest and most complex agencies in the nation. In the past year alone, we’ve worked on 1,400+ projects for 850+ clients in 46 states, the District of Columbia, and internationally. Below, we have provided descriptions of projects that we have worked on that are similar in scope to the City’s project. We have included references for each of these clients and urge you to contact them to better understand our capabilities and the quality of service that we provide.



RAFTELIS HAS PROVIDED FINANCIAL/ ORGANIZATIONAL/TECHNOLOGY ASSISTANCE TO UTILITIES SERVING MORE THAN 25% OF THE U.S. POPULATION.

City of Lake Wales FL

Reference: Autumn Cochella, Development Services Manager,
201 West Central Avenue, Lake Wales, FL 33853 / P: 863.678.4182 (x229) / E: acochella@lakewalesfl.gov

Raftelis prepared a comprehensive study of the water, wastewater, police, fire rescue, parks and recreation, and library impact fees for the City of Lake Wales (City) in 2020. The study included a review of the City’s level of service (LOS) standards, an analysis and projection of population and dwelling units, and an evaluation of existing assets and future capital requirements to serve growth. Proposed Impact fees were then developed based on a functional population-style approach for residential and nonresidential property types. Raftelis also assisted in the review of the draft ordinances prepared by the City’s legal counsel and attended public workshops with City leadership to discuss the analysis, major assumptions, fee application methodology, and proposed impact fees. The proposed fees were adopted successfully by the City’s elected officials. Raftelis is currently working on an update to this study for 2026.

City of Panama City Beach FL

Reference: Holly White, Finance Director, City of Panama City Beach
110 South Arnold Road, Panama City Beach, FL 32413 / P: 850.233.5100 / E: hwhite@pcbgo.com

Raftelis prepared an impact fee study to update the City of Panama City Beach's (City) existing fees for providing water and wastewater utility services to new development. The City's existing and planned future infrastructure, usage characteristics, levels of service, existing capacity, and planned future capacity expansions were all analyzed. The study reviewed current application methods and updated fee levels. The results and recommendations were documented in a detailed report, presented publicly to the City stakeholders, and subsequently approved by City leadership. Raftelis is currently working on an update to this study for 2026.

City of Palm Coast FL

Reference: Helena Alves, Finance Director
160 Lake Avenue, Palm Coast, FL 32164 / P: 386.986.3726 / E: halves@palmcoastgov.com

Raftelis completed a parks and recreation impact fee study and a fire rescue impact fee study for the City of Palm Coast (City). The two studies both included a review of the City's historical population and growth in dwelling units, as well as the development of a projection of growth in units based on growth trends and recent City planning data. The existing assets and investment in the two departments were also reviewed and functionalized for inclusion in the fee analysis. The forward-looking multiyear capital improvement programs were then reviewed and functionalized by the department as well, based on information provided by and discussions with the City. Currently provided Levels of Service (LOS) in terms of acres and investment, and response calls were then reviewed and compared to the City's targeted standards. Proposed fees were then developed for each service based on the data and analyses performed. A report was developed to document and disclose the study process, assumptions, analyses, and proposed fees. The proposed fees were subsequently presented to City leadership and successfully adopted.

City of Clermont FL

Reference: Scott Davidoff, ICMA-CM, CPRP (Former Deputy City Manager for City of Clermont, now with the City of St. Cloud)
1300 9th Street, St. Cloud, FL 34769 / P: 407.957.8406 / E: scott.davidoff@stcloudfl.gov

Raftelis was engaged by the City of Clermont (City) to conduct an impact fee study for police, fire rescue, parks and recreation, water, and sewer services. The study involved analyzing the City's current level of service (LOS) standards, historical and projected population growth, and development trends. Raftelis assessed existing infrastructure and capital facilities, identifying future investments needed to support new development and service demands. The final recommendations included an impact fee schedule for each service type, supported by detailed documentation of the methodology and assumptions. The study's findings and proposed fees were presented to City leadership in public workshops. After stakeholder discussions and internal legal review, the City successfully adopted the impact fees.

City of Boynton Beach FL

Reference: Mathew Zeller, Deputy Chief

2100 High Ridge Road, Boynton Beach, FL 33426 / P: 561.742.6132 / E: zellerm@bbfl.us

The City of Boynton Beach (City) engaged Raftelis to conduct a police impact fee study focused on funding police services for new development. The objective was to ensure that the costs of expanding police protection capital facilities to meet the demands of a growing population were fairly distributed across future developments, helping to maintain public safety and service levels. Fees were designed for residential and non-residential land uses using a functional population approach. A comprehensive report was prepared, documenting the study's assumptions, methodology, and recommendations. Raftelis worked closely with City leadership throughout the process, presenting the proposed police impact fees in public workshops and meetings to engage stakeholders and gather feedback. Following these discussions, the City of Boynton Beach adopted and implemented the proposed police impact fees.

Town of Eatonville FL

Reference: Katrina Gibson, Finance Director

307 East Kennedy Boulevard, Eatonville, FL 32751 / P: 407.623.8905 / E: kgibson@townofeatonville.org

The Town of Eatonville (Town) engaged Raftelis to conduct an impact fee study to establish fees for police services, parks and recreation, and general government/administrative facilities for first time implementation. This study aimed to ensure that the costs associated with expanding these essential services would be fairly allocated to new developments as the Town grows. The study included an analysis of the existing assets for each service/department, as well as the planned future capital needs and levels of service. Using a functional population approach, the study calculated the new impact fees, ensuring that various land uses contributed equitably based on their service demands. The findings were compiled in a comprehensive report, which Raftelis presented at public workshops to gather feedback from the public and Town Council. The Town successfully adopted the fees in the summer of 2024.

City of St. Cloud FL

Reference: Stephanie Holtkamp, CPRE, CPSI, AFO, Parks and Recreation Director

1300 9th Street, St. Cloud, FL 34769 / P: 407.908.9625 / E: stephanie.holtkamp@stcloudfl.gov

The City of St. Cloud (City) hired Raftelis in 2020 to perform a comprehensive study for the City's existing police, fire, parks and recreation, and mobility impact fees. Based on the continued rapid expansion of new single-family and multi-family development, the City had identified several large investments into a new police headquarters building, fire stations, and park master plan projects. Each of these projects (amongst others) was evaluated to determine the proportional share between existing development and new development to establish fair share cost apportionments and levels of service, and to establish a reasonable dual-rational nexus test for all fee areas.

The City is located to the South of Orlando in Osceola County, which has been growing rapidly for the past ten years. Using a functional population approach, whereby the demands for service from different types of development can be derived, Raftelis developed a fee schedule for the City that met their needs and addressed several types of development that were expected in the future. Raftelis assisted with the implementation of impact fees, including a comprehensive technical report and presentations to the City Council during workshops and public hearings that led to the ultimate adoption of new and updated impact fees.

Holley-Navarre Fire District FL

Reference: Kevin Lewis, Chief

8618 Esplanade St. Navarre, FL 32566 / P: 850.939.5236 / E: chief@hnfd.org

Raftelis was engaged by the Holley-Navarre Fire District (District) to conduct an impact fee study focused on funding fire rescue capital facilities for new development within the District's jurisdiction. The study aimed to update the District's impact fees to ensure that growth-related costs associated with fire protection were adequately recovered. The study included a thorough analysis of the District's level of service (LOS) standards, historical population trends, and projected future development across both residential and nonresidential land uses. Raftelis analyzed the current fire rescue infrastructure, including fire stations, emergency vehicles, firefighting equipment, and personnel levels, to evaluate the existing capacity and identify additional resources needed to support future growth.

Key capital improvements, such as the construction of new fire stations and the acquisition of fire apparatus and emergency response vehicles, were incorporated into the fee calculations as well. Raftelis calculated the fire impact fees for different land use categories, reflecting the varying demands placed on fire services by residential, commercial, and industrial properties. A detailed report was developed to document the study's methodology, assumptions, and recommendations. Raftelis also worked closely with District leadership, conducting public meetings to present the findings and addressing any questions from stakeholders and the community. The updated fire rescue impact fees were successfully adopted by the Fire District's governing board in 2024.

City of Lake Alfred FL

Reference: Ryan Leavengood, City Manager

155 East Pomelo Street, Lake Alfred, FL 33850 / P: 863.291.5270 / E: rleavengood@mylakealfred.com

The City of Lake Alfred (City) retained Raftelis 2022 to update the impact fees based on recent and local costs, as well as significant constraints and alternative water needs pursuant to local growth and water availability. Raftelis initially established the City's impact fees in 2018, including the public safety (police and fire services), parks and recreation, public facilities / general government, water, and wastewater impact fees. The City is anticipating significant growth and desired an update to the impact fees to reflect the current costs of providing service, along with the ability to reflect the current level of service provided to existing development. To maintain a high quality of service, the City has identified future projects and investments necessary to accommodate new growth, which have been reflected in the impact fee calculations. Several alternatives were reviewed for assessing impact fees to growth including a more nuanced approach with an expanded number of land uses versus the simpler approach to administer per square foot of development approach. These fees were successfully presented to and adopted by the City Commission.

City of New Smyrna Beach FL

Reference: Natalia Eckroth, CPA, CGFO, Chief Financial Officer at Daytona Beach (formerly at NSB)

301 South Ridgewood Ave, Daytona Beach, FL 32114 / P: 386.671.8063 / E: eckrothnatalia@codb.us

The City of New Smyrna Beach (City) retained Raftelis in 2021 to update the police, fire, and parks and recreation impact fees to reflect the current costs of providing the necessary infrastructure and to meet the demands of growth. The City has unique characteristics in that it is a historical coastal community and is transitioning more towards inland development of annexed areas. The City has a high transient population with significant Airbnb and similar short-term rental situations that are creating increased demands on the City's services, with minor redevelopment activity. This was addressed through the fee calculations as well as updating the cost recovery to match future needs.

City of Ormond Beach FL

Reference: Steven Spraker, AICP, Planning Director

22 South Beach Street, Room 104, Ormond Beach, FL 32175 / P: 386.676.3341 /

E: steven.spraker@ormondbeach.org

Raftelis was retained by the City of Ormond Beach, FL (City) to prepare a comprehensive analysis to update its water and wastewater utility connection fees, as well as its parks and recreation, stormwater, and transportation (local roads and mobility fees) impact fees for the City. To accomplish this project, Raftelis teamed with a transportation engineering consultant and an impact fee attorney in order to accomplish the transportation impact fees and provide legal assistance to the City. The study included a review of the City's level of service (LOS) standards for all utility and municipal services, an analysis of historical population and projection of population and dwelling units, and an evaluation of existing and future capital investment available to serve new growth. Proposed Impact fees were then developed based on a functional population-style approach for residential and nonresidential property types.

The study also included a feasibility analysis to assess whether the City could reasonably implement new police and fire impact fees. Upon completion of the feasibility analysis, Raftelis then developed the police and fire implementation. Raftelis also assisted in the review of the draft impact fee ordinances prepared by the City's legal counsel and attended public workshops and hearings with the City Commission to discuss the fee analysis, major observations and assumptions, fee application methodologies, and proposed impact and connection fees. The study's recommendations were successfully received by the Commission, and the City is currently finalizing the fee adoption process.

City of Sanford FL

Reference: Cynthia Lindsay, Finance Director

300 North Park Avenue, Sanford, FL 32771 / P: 407.688.5026 / E: cynthia.lindsay@sanfordfl.gov

Raftelis updated the City of Sanford's (City) police and fire impact fees in order to represent current costs and to develop fees for various non-residential land uses. The Raftelis project manager has over a decade of experience managing projects for the City of Sanford. These projects have included numerous impact fee, utility rate and revenue sufficiency studies. Impact fee studies have included water and sewer impact fees and municipal impact fees. The original police, fire, and recreation impact fee study involved the coordination of five City departments plus the City Manager's office in order to complete the data and policy review. A kick-off meeting was held to collaborate with the various department leaders and staff involved with the project, where certain assignments and project goals were established, including the City's commitment to meeting the level of service targets for police, fire, and recreation services.

During the review of the capital improvements plan, the growth-related allocations of planned projects were determined, including the City's planned construction of a public safety building in order to meet the growing needs of police and fire services by the community. Detailed fixed asset records, including equipment and facilities, were reviewed to determine existing versus growth-related allocations and existing service levels. Various open space and recreation land uses were reviewed to determine actual versus planned level of services, with adjustments to account for investments needed to meet existing service level deficiencies. The various municipal impact fee recommendations were summarized in a report submitted to the City and presented to the City Commission. The recommended fees were adopted by the Commission in 2008 and updated in 2010. These fees were updated in 2014 and in 2021.

National Experience

This matrix shows a brief sample of some of the utilities throughout the U.S. and Canada that Raftelis staff has assisted and the services performed for these utilities.

State	Client	Finance					Organization					Technology				
		Affordability Analysis & Program Development	Capital Improvements Planning/Prioritization	Debt Issuance Support	Economic & Financial Evaluations	Financial Planning & Modeling	Rate, Charge, & Fee Studies	Stormwater Utility Development & Support	Organizational, Governance, & Operations Optimization	Performance Measurement & Benchmarking	Program Planning & Support	Stakeholder Engagement & Communication	Strategic Planning	Billing, Permitting, & Customer Information Audits	Business Process Development	Data Management, Analytics, & Visualization
AL	Birmingham Water Works Board	●	●	●	●	●	●		●	●	●				●	
AR	Central Arkansas Water		●		●	●		●				●				
AR	Little Rock Water Reclamation Authority		●		●	●						●				
AZ	Phoenix, City of	●	●	●	●	●										
AZ	Pima County		●		●	●										
AZ	Tucson Water		●		●	●					●					
CA	Alameda County Water District		●	●	●	●										
CA	Anaheim, City of		●		●	●										
CA	Central Contra Costa Sanitation District		●		●	●		●	●							
CA	East Bay Municipal Utility District	●	●		●	●										
CA	Long Beach, City of	●		●	●	●										
CA	Los Angeles, City of				●	●										
CA	Metropolitan Water District of Southern California				●	●			●							
CA	Palo Alto, City of		●		●	●										
CA	San Diego, City of		●		●	●										
CA	San Juan Capistrano, City of		●		●	●										
CA	Santa Cruz, City of		●		●	●										
CA	Thousand Oaks, City of	●	●		●	●										
CA	Ventura, City of				●	●					●					
CO	Boulder, City of		●		●	●	●									
CO	Denver Wastewater Management Division			●		●		●	●		●					
CO	Denver Water					●										●
CO	Greeley, City of		●	●	●	●	●									
CO	Metro Wastewater Reclamation District											●				
CT	Groton, City of		●		●	●		●		●	●		●		●	●
DC	DC Water		●		●	●		●	●			●				●
DE	Wilmington, City of							●				●				
FL	Emerald Coast Utilities Authority		●	●	●											
FL	Florida Keys Aqueduct Authority		●	●	●	●										
FL	Pompano Beach, City of		●		●	●		●								
FL	St. Johns County		●	●	●	●										
GA	Augusta, City of		●		●	●										
GA	Columbus Water Works		●	●	●	●										

State	Client	Finance					Organization					Technology				
		Affordability Analysis & Program Development	Capital Improvements Planning/Prioritization	Debt Issuance Support	Economic & Financial Evaluations	Financial Planning & Modeling	Rate, Charge, & Fee Studies	Stormwater Utility Development & Support	Organizational, Governance, & Operations Optimization	Performance Measurement & Benchmarking	Program Planning & Support	Stakeholder Engagement & Communication	Strategic Planning	Billing, Permitting, & Customer Information Audits	Business Process Development	Data Management, Analytics, & Visualization
GA	Paulding County		●	●	●	●										
HI	Honolulu ENV, City and County of		●			●	●									
IL	Bloomington, City of		●			●	●									
IL	City of Naperville		●			●	●									
KS	Topeka, City of		●			●	●									
KS	Wichita, City of		●			●	●									
KY	Hardin County Water District #1		●			●	●									
LA	New Orleans, Sewerage & Water Board of		●	●		●	●	●		●					●	
MA	Boston Water & Sewer Commission		●			●	●	●		●					●	●
MA	Northampton, City of	●				●	●								●	
MD	Baltimore, City of	●	●			●	●	●	●			●			●	●
ME	Portland Water District					●	●									
MI	Detroit Water and Sewerage Department					●	●									
MI	Flint, City of					●	●								●	
MI	Saginaw, City of		●			●	●									
MO	Metropolitan St. Louis Sewer District		●	●		●	●	●		●						
MS	Jackson, City of	●	●			●	●		●						●	
NC	Asheville, City of		●	●		●	●		●				●			
NC	Charlotte Water	●	●			●	●									
NC	Durham, City of		●	●		●	●									
NC	Raleigh, City of		●	●		●	●	●		●						
NH	Concord, City of		●			●	●									
NJ	Brick Township Municipal Utilities Authority					●	●									
NJ	Jersey City Municipal Utilities Authority		●			●	●									
NV	Henderson, City of		●			●	●									
NY	Erie County Water Authority					●	●									
NY	New York City Water Board		●			●	●								●	
OH	Akron, City of		●			●	●					●				
OH	Franklin County		●			●	●		●							
OH	Montgomery County Environmental Services		●			●	●		●	●		●		●	●	●
OH	Northeast Ohio Regional Sewer District	●	●			●	●	●		●					●	●
OK	Chickasha, City of					●	●	●	●		●			●	●	
OK	Oklahoma City Water Utilities, City of					●	●									

State	Client	Finance				Organization					Technology						
		Affordability Analysis & Program Development	Capital Improvements Planning/Prioritization	Debt Issuance Support	Economic & Financial Evaluations	Financial Planning & Modeling	Rate, Charge, & Fee Studies	Stormwater Utility Development & Support	Organizational, Governance, & Operations Optimization	Performance Measurement & Benchmarking	Program Planning & Support	Stakeholder Engagement & Communication	Strategic Planning	Billing, Permitting, & Customer Information Audits	Business Process Development	Data Management, Analytics, & Visualization	Software Solutions
OK	Stillwater Utilities Authority					●	●									●	
OR	Portland Bureau of Water, City of		●	●		●	●									●	
PA	Capital Region Water	●	●	●		●	●	●			●	●					
PA	Philadelphia Water Department	●	●	●		●	●		●	●	●	●			●	●	●
PA	Pittsburgh Water and Sewer Authority	●	●	●	●	●	●		●	●	●	●		●	●	●	●
RI	Newport, City of		●	●		●	●										
RI	Providence Water Supply Board		●			●	●		●	●							
SC	Greenville Water					●	●		●								
SC	Mount Pleasant Waterworks		●			●	●					●					
TN	Johnson City, City of	●	●	●		●	●										
TN	Metro Water Services of Nashville and Davidson County		●	●		●	●	●		●	●	●					
TX	Austin, City of		●	●		●	●			●							
TX	Dallas, City of		●			●	●	●			●			●	●		
TX	El Paso Water Utilities		●	●		●	●				●	●			●	●	●
TX	North Texas Municipal Water District		●		●				●	●	●	●		●			●
TX	Round Rock, City of						●										
TX	San Antonio Water System	●	●			●	●				●						
UT	Salt Lake City					●	●				●						
VA	Newport News Department of Public Utilities		●	●		●	●					●				●	
VA	Richmond Department of Public Utilities	●	●			●	●	●			●					●	
VA	Suffolk, City of		●	●		●	●										
VT	Burlington, City of		●	●		●											
WA	Tacoma, City of				●		●					●				●	
WI	Milwaukee Metropolitan Sewerage District		●			●	●										
WI	Milwaukee Water Works		●			●	●										
WV	Charleston Sanitary Board						●										
Can	Calgary, City of		●			●			●							●	
PR	Puerto Rico Aqueduct and Sewer Authority		●	●		●			●	●	●						

PROJECT TEAM

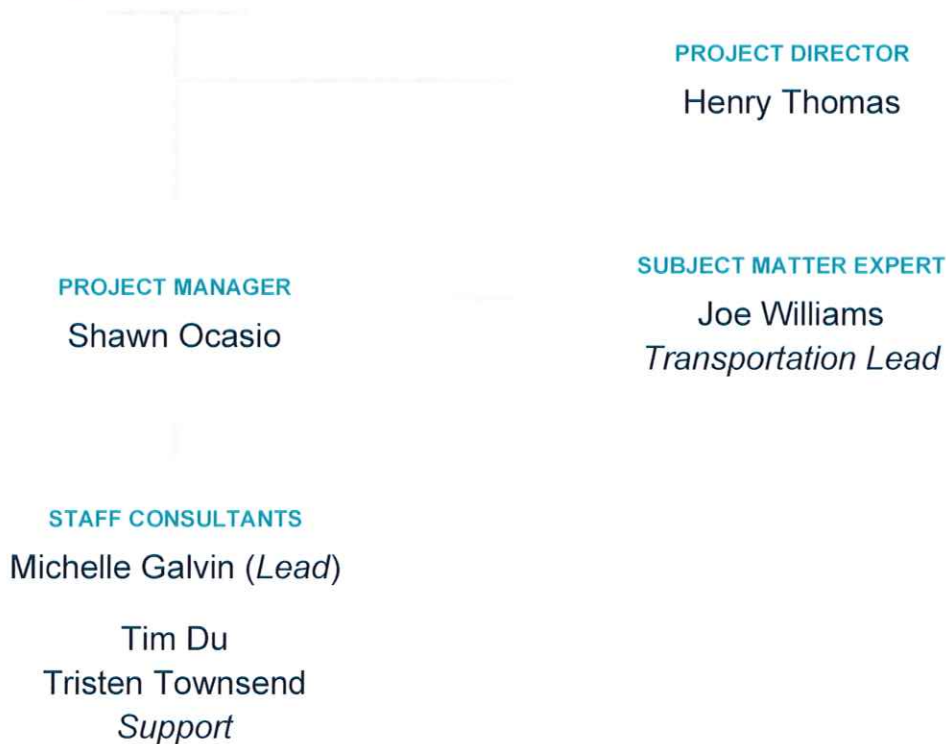
Project Team

WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY'S PROJECT.

Our team includes senior-level professionals to provide experienced project leadership with support from talented consultant staff. The three senior members of this team have over 75 years of combined experience and have provided high quality impact fee consulting services to numerous communities across the state with diverse needs ranging from first time fee implementations, existing fee updates, fee application methodology redesigns, impact fee zone development, providing impact fee credit policy recommendations, and assisting with fee implementations under the standard phasing approach and under the extraordinary circumstance provisions of Florida Statutes. This close-knit group has frequently collaborated on similar successful projects, providing the City with confidence in our team's capabilities.

Here, we have included an organizational chart showing the structure of our project team. We have included resumes for each of our team members as well as a description of their role on the project in Appendix A.

City of Neptune Beach



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PROJECT APPROACH

Project Understanding

The City is seeking a comprehensive impact fee study to develop municipal impact fees for police protection, water, wastewater, transportation, and public facilities and administration-related capital facilities to ensure proper recovery of expansion-related costs for each service from new development for the first time implementation. The need for capacity to serve growth is generally the result of new development and redevelopment of existing structures. As development and redevelopment occur within a municipality, a review of the capacity needs for utility and municipal capital facilities and the related costs incurred to provide them should be undertaken and updated periodically. Through this exercise, the City will be able to establish valid impact fees based on an appropriate level of service and the cost for each unit of new development to maintain this level of service as the City grows and/or redevelops.

As a source of capital funding, impact fees have certain restrictions established under State law and must not be combined with general revenues, such as sales and property taxes. Impact fees are one-time charges to new development for specific public infrastructure that benefits new development. In contrast to project-level improvements, impact fees fund growth-related infrastructure that benefits multiple development projects, or the entire jurisdiction (generally referred to as system improvements). Impact fees are intended to proportionately allocate infrastructure costs to all types of new development.

There are three general methods for calculating development impact fees. The choice of the best method depends primarily on the timing of infrastructure construction (past, concurrent, or future) and service characteristics of the type of development being addressed. These methods can be used simultaneously for different cost components considered in the development of impact fees. Regardless of the methodology, a consideration of “credits” is also integral to the development of a legally defensible impact fee study. In addition, impact fee revenues must be used to fund the type of infrastructure for which the fee was collected, while providing a timely and measurable benefit to new development.

Project Approach

Raftelis’ team will help the City develop impact fees to recover the growth-related share of infrastructure costs for police protection, water, wastewater, transportation, and public facilities and administration-related services, thus mitigating the funding burden on existing taxpayers. Raftelis has a unique offering that the City can leverage for success, with the ability to provide local and national knowledge and perspective for this project.

IMPACT FEE BACKGROUND

An impact fee is a charge imposed on new users of real property to help finance the capital cost of municipal services necessary to serve new development. The purpose of an impact fee is to assign, to the extent practical, growth-related capital costs to those new residents or users responsible for such additional costs. The impact fee is considered to be a new user’s contribution to capital costs that are required for facilities in order to provide a comparable level of service capacity to that which is being provided to existing customers. Impact fees in Florida are governed by Section 163.31801 of the Florida Statutes (known as the “Florida Impact Fee Act”) as well as other supporting caselaw.

IMPACT FEE CRITERIA

To the extent new population growth and associated development impose identifiable capital costs to municipal services, those costs should be recovered from the residents or system users responsible for the costs rather than the existing population base. Generally, this practice has been labeled as “growth paying its own way.”

Florida Statutes and Florida case law identify certain conditions for a valid impact fee imposed by municipalities. Generally, these conditions involve the following issues:

- The impact fee must meet the “dual rational nexus” test. First, impact fees are valid when a reasonable connection or rationale exists between the anticipated need for additional capital facilities and the growth in population. Second, impact fees are valid when a reasonable association, or rational nexus, exists between the expenditure of the impact fee proceeds and the benefits accruing to new development from those proceeds.
- The system of fees and charges should be set up so that there is not an intentional windfall to existing users.
- The impact fee should, to the extent practical, only cover the capital cost of construction and related costs thereto (engineering, legal, financing, administrative, etc.) for capital expansions or other capital requirements that are required solely due to growth. Therefore, expenses due to upgrading of a facility serving existing customers (e.g., replacement of a capital asset) or an increase in the level of service should be borne by all users of the facility. Likewise, increased expenses due to the operation and maintenance of that facility should be borne by all users of the facility.
- Impact fee revenue should be set aside in a separate account, and separate accounting must be made for those funds to ensure that they are used only for the lawful purposes described above.

Based on the criteria above, impact fees should:

- Include only the estimated capital cost of facilities necessary to serve anticipated new development
- Reflect only an allocated portion of costs associated with improvements of existing capital assets of the City
- Should not include any costs of operation and maintenance of any facilities, including those facilities financed in part with impact fees

Florida Statutes provide for additional criteria in the design of impact fees. Section 163.31801 of the Florida Statutes further provides that an impact fee adopted by ordinance of a county or municipality or by resolution of a special district must, at a minimum:

- Require that the calculation of the impact fee be based on the most recent and localized data
- Provide for accounting and reporting of impact fee revenues and expenditures in a separate accounting fund
- Limit administrative charges for the collection of impact fees to actual costs
- Require that collection of the fee cannot occur before the issuance of a building permit
- Require that notice be provided no less than ninety (90) days before the effective date of an ordinance or resolution imposing an increase in impact fees

Additionally, the Florida Impact Fee Act requires that audits of financial statements of local governmental entities and district school boards that are performed by a certified public accountant pursuant to Florida Statute 218.39, submitted to the Auditor General, must include an affidavit signed by the chief financial officer of the local governmental entity or district school board stating that the local governmental entity or district school board has complied with this section.

GENERAL PROJECT APPROACH

Our project approach has been developed through many years of experience, and we follow industry standard methods applied specifically to the City’s unique characteristics to ensure fair and equitable impact fees that are defensible and meet the needs of the City.

Our Team's approach is based on our understanding of the major objectives to be accomplished by the study, which are as follows:

- Estimation of projected demands and review of the capital needs of the City to fund growth-related utility and municipal service-related requirements
- Ensuring that any impact fees developed are based on the most recent and localized data to be in compliance with the Florida Impact Fee Act
- Assist in the development of reasonable level of service standards for the development of impact fees consistent with the City's comprehensive plan information and requirements, industry standards, and current service levels provided by the City
- Development of impact fee structures taking into account the estimated capital costs associated with the various services' capacity needs, other available funding sources, and the classes of customers for which the fees will be applied (i.e., single-family residence, multi-family residence, commercial by class, etc.). The model used to develop the impact fee analysis will be in Microsoft Excel (possibly using Microsoft Access for certain elements) and will be shared in interactive review sessions with the City.
- Ensuring that any proposed fees are proportional and reasonably connected to the need for additional capital facilities and the increased impact generated by new development
- Development of a phase-in plan for impact fee increase as required by the Florida Impact Fee Act
 - As these fees are for first-time implementation, a multi-year fee implementation phase-in plan may not be required by State Statute but can be developed for the City's consideration.
- Demonstration of extraordinary circumstances of need to justify impact fees
 - As these fees are for first-time implementation, the demonstration of extraordinary circumstances may not be required by State Statute.
- Development of a fee comparison with surrounding or comparable cities to ensure reasonableness, consistency, and feasibility
- Assistance in reviewing the draft impact fee ordinances as prepared by the City's legal counsel to adopt the proposed impact fees and associated administrative procedures associated with implementation, such as phasing in fees or implementation via the extraordinary circumstance provisions of the Florida Statutes (if applicable)
- Providing policy direction on the use of impact fee revenues, transferability of impact fee credits, timing for review and consideration of any adjustments to exception or waiver of impact fees, separate accounting of revenues and expenditures of collected fees, and outlining the requirements for the process of adoption
- Documentation and presentation of the study results to the City's staff and City leadership. The briefing documents used in the public presentations will be designed in Microsoft PowerPoint, and the narrative report will be developed in Microsoft Word and transmitted in PDF format.

PROJECT MANAGEMENT APPROACH

We believe that the City's utility and municipal impact fees should be consistent with management's goals, the existing capital planning process, financial information systems and operating data, and the project goals and objectives and criteria outlined previously in this section. The critical nature of the consultant's role will require a project team capable of coordinating with City staff to resolve questions related to impact fee issues, such as:

- Existing investment in capital facilities and future capital funding plans
- Level of service requirements
- Service categories and attributes
- Fee structures by customer class
- Implementation considerations

Our approach to providing the proposed consulting services will place a major emphasis on the coordination and communication elements of the study process. The key to successfully completing the scope of services and meeting the project deadlines is to start with a well-conceived project plan with clearly delineated tasks and deliverables, properly manage the resources necessary to complete the study, effectively coordinate our team's activities with the City, and maintain clear lines of communication with the City's project team.

Regarding communication, Raftelis will set up periodic check-in calls and updates with the City's team to provide information as to the project status and next steps. In addition to these regularly scheduled calls, Raftelis will also provide the City's project team with email and phone contact information to ensure that the City can reach out regarding meetings, general communications, project coordination, and general supervision. We ensure accessibility by operating at a company-wide project utilization of approximately 65% to 75%. This level of utilization, which we expect to continue through the proposed timeline of this project, will provide the project team with ample time to allocate to the City's engagement.

In the proposed impact fee study work plan, we have made allowances for meetings with City staff throughout the study to develop and review study assumptions and results. The work plan also includes attendance at public meetings to present the study results to the City Council.

Experience has taught us to perform impact fee studies in a series of phases. We have found this approach to be very successful in meeting the needs of our clients. We believe a phased approach to the work plan will enhance the coordination efforts of our project team and City staff for the following reasons:

- A phased approach allows City staff to get involved in the fundamental planning assumptions and analysis at various points throughout the study, and to continuously monitor the study progress, which is critical to the timely completion of the project.
- It allows City staff to provide more effective input to the study process with respect to strategic decisions, and to affirm that the study is on course and consistent with the City's policies, goals, and objectives, thus ensuring a successful project.
- It allows City staff members to fully understand and review the individual study components and promotes a more effective public information program.
- It results in a cost-effective project as each phase builds on the results of the prior phase.

Our approach also includes project management and quality control steps to ensure that study results are reasonable, achieved cost-effectively, and on schedule. A detailed study schedule will be developed in conjunction with the City's staff. The schedule will be reviewed by the project manager on an ongoing basis and updated, as required, to keep track of study progress. Scheduling problems, corrective measures and adjustments, as necessary, will be coordinated with City staff as they occur.

Additionally, a detailed cost estimate by study task will be prepared for each specific project phase and task. The cost estimate will be used to track actual project costs and will be reviewed monthly to ensure project cost control. We have used this process for each of the projects in the References section and have had great success with cost control to the extent that the respective client did not add new tasks or additional analyses to the scope, requiring a change order.

Generally, in these types of studies, the major issues and problem areas include identifying proper service categories and establishing a reasonable basis for a fair apportionment of the costs for the service categories based on level of service considerations. We propose dealing with these issues through detailed discussions with the City's planning staff about future development and land uses, experience and problem areas associated with implementing the current fee schedule, development of appropriate alternative fee application methods, and the use of empirical data and accepted industry standards to support our recommendations.

PUBLIC ENGAGEMENT AND STAKEHOLDER INVOLVEMENT

Providing an effective public event or outreach process lends credibility and transparency to any communications effort. Raftelis is experienced in assisting clients in developing public involvement efforts that engage the public and encourage meaningful exchange of information. When engaging the public on complex initiatives such as impact fees, it's challenging to help stakeholders understand the issues, let alone motivate them to participate. Building on your existing outreach efforts, we look to expand and ensure that the public participation and outreach developed for your projects align with past approaches and preferences.

In order to facilitate public engagement, Raftelis will first ensure that the City's internal project team is adequately briefed on all major assumptions throughout the course of the project. This will ensure that as questions are posed to the City's team by the public and executive leadership during the course of the project, they will be able to convey the relevant information accurately and confidently. An important part of our project management approach is regular virtual briefings with the City's project team during all stages of the project in order to keep all major participants informed of the latest information and overall status, as well as to receive input from the City.

As recommendations and an implementation plan are developed, Raftelis will work with the City's project team to develop a plan for public notification and involvement. Generally, we recommend that the City first have a public workshop to address the assumptions, analyses, and results and recommendations of the study in order to allow the public and City Council to provide feedback and comments. This initial workshop should be publicly noticed in the newspaper as well as on the City's website and social media outlets to ensure public attendance and involvement. These workshops can encourage stakeholders to bring questions and ask subject matter experts questions about the study and recommendations, thereby increasing engagement.

We also find that one-on-one meetings with the members of a City Council can be very beneficial as they allow for the Council members to ask additional questions and engage in a more in-depth dialogue than what may be done in a public forum workshop, due to time constraints not being a factor. These sessions allow the elected officials to better understand the issues, get in-depth explanations, and answers to their questions. Meetings with the development community can also be very productive as they allow those who will likely be most impacted by any changes in impact fees to provide their feedback and concerns to the elected officials and project team.

These sessions allow the community to feel more confident that their input has been incorporated into the decision-making process. The next steps would be conducting the first and second ordinance readings during regularly scheduled Council meetings. These readings should also be publicly noticed in a similar fashion to the workshop to ensure public participation. It is important to bring the public and stakeholders along for each step of the approval process to make sure all opinions are heard.

QUALITY CONTROL

Credibility is crucial for building consensus and support for implementing the recommendations of a study. The fastest way for the City to lose credibility with its stakeholders is to provide information that is incomplete or incorrect. The City must have total confidence that the information provided by the consultant is as accurate as possible.

Raftelis has developed a Quality Assurance (QA) process that consistently results in accurate deliverables of the highest quality. Each QA plan is tailored to the specific project, but there are a number of common elements, such as senior-level participation, outside perspective, and involvement from project initiation. The QA plan that we will implement as part of this project embodies these elements. We have found that a well-defined QA plan ensures that our work products will be of the highest quality and meet or exceed the standards that our clients have come to expect from Raftelis.

As the project's Technical Advisor, Joe Williams will be utilized to provide additional perspective from other similar projects nationally and in the region. Joe will add an outside perspective to the project team that will introduce fresh thinking and deepen insights. Raftelis' project delivery plan always includes layered, independent reviews of key deliverables to ensure accuracy and completeness are achieved, and input is gathered from senior experts. We have included time in the project approach and schedule to allow for the necessary QA reviews.

Proposed Project Scope

The following project approach, described in detail below, is proposed to accomplish this project for the City. The task listing has been structured and ordered in the general manner that our team approaches these types of studies, but has also been linked back to the tasks listed in the City's RFP. We have had great success with this project approach in many of our team's efforts historically and believe it would be well-suited to accomplish the City's goals and objectives.

Task 1 – Prepare Data Request/Kick-off Meeting

The initial task will include preparation of a data request to identify the information to be provided by the City. This task will also include an on-site project kick-off meeting to discuss project goals and objectives, data concerns, impact fee methods, administrative issues, and project schedule.

Task 2 – Data Gathering and Review

This task will be based on interviews with City staff (police, water, sewer, finance, planning, and other departments) and a review of the data compiled and provided by the City in response to the data request prepared in Task 1. Data that will be requested will include:

- Fixed asset records
- Level of service standards
- Capital projects, equipment, and facilities required to provide the relevant municipal and utility services
- Population estimates and projections
- Comprehensive and master planning data
- Historical response call data, historical customer billing statistics, etc.
- Information regarding impact fees charged by other neighboring jurisdictions
- Any other data and information considered necessary to adequately perform the study

One virtual meeting is contemplated as a part of this task to follow up on any questions or concerns with the data provided by the City.

Task 3 – Service Area Forecast

An evaluation of the current service area demographics, population and employment, as well as a forecast of the service area needs, will be reviewed based on data available to Raftelis. Specifically, a review of the population forecast by type of dwelling unit (e.g., single-family, multi-family, etc.) and commercial development by land use type, if available (including the square footage of such developments located within the City and planned for the City), will be reviewed.

A review of the population projections and other service area demographics as contained in such documents as the City's Comprehensive Land Use Plan, Florida Statistical Abstract, US Census Bureau, other information provided by the Bureau of Economic and Business Research, University of Florida, data made available by the City's

Planning Department, and other such information will be relied upon. The purpose of this task is to identify the future service area demands for service and to estimate the capital requirements (level of service relationship) required for the fair share cost apportionment of such costs to future growth. This task will include the development of a functional population estimate for the various commercial land uses that we will use in the cost allocation and fee design tasks (where applicable). This task will also include utilizing trip generation data by land use. This task contemplates one virtual meeting to discuss land uses and / or customer classes as it relates to fee design and application considerations.

Task 4 – Review Level of Service Standards and Cost Allocation

The capital costs associated with meeting the service requirements for new customers will be identified. These costs will be allocated by residential and commercial customer classifications, as appropriate. The allocation of such costs will be based on the service area demographics, level of service considerations, and development characteristics of the City, and other factors as deemed appropriate by Raftelis and the City. This task will include a virtual meeting to discuss assumptions and allocation methodologies.

Task 5 – Design of Impact Fees

The police, water, wastewater, transportation, and public facilities and administration impact fees will be calculated for a unit of service, recognizing the utilization of capacity by an equivalent residential unit (e.g., single family residential) and will reflect the City's capital cost to serve such new development. This task will include the following:

- Develop an appropriate impact fee application methodology
- Identification of appropriate impact fee design approach, including the cost of constructing expansion-related capital improvements (Incremental or Marginal Cost method) or capital costs of existing facilities with capacity available to serve new development (System Buy -In) or a combination of both methods, where appropriate
- Identification and analysis of existing facility costs based on asset or property records and expansion-related costs based on the City's capital improvement program to provide services to future service area needs for a multi-year planning horizon
- Evaluation of existing service capacity utilization relationships and capacity additions
- Review of level of service standards for various services
- Calculate impact fees based on appropriate allocable cost recovery
- One onsite meeting and one virtual meeting with staff to review preliminary and revised impact fee designs and obtain comments

Task 6 – Impact Fee Comparisons

A comparison of the City's proposed impact fees for an equivalent residential unit and commercial development will be made with similar fees charged by other neighboring jurisdictions.

Task 7 – Assisting in Preparation of Impact Fee Ordinance

Raftelis' team will assist the City in developing the proposed impact fee ordinances as drafted by the City's legal counsel. The review of the ordinances may include providing comments on issues such as the level of fees charged per unit of service and methodology for application, allowance for alternative methods of calculation, and establishment of a fund for the use of monies as considered necessary for the adoption of the fee.

Task 8 – Presentation of Findings

A report will be prepared by Raftelis detailing the data and assumptions relied upon in the development of the proposed impact fees, the analyses performed relative to the derivation of such fees, including supporting documentation that addresses compliance with the State of Florida's Impact Fee Act, and our conclusions and recommendations for consideration by the City. It is anticipated that a draft report will be prepared for consideration and review by City staff prior to presentation to the City Council for consideration, adoption, and implementation. It should be noted that this task assumes implementation of fees through the standard statutory process and not via the extraordinary circumstance provisions and procedural requirements of the Florida Statutes, as these are fees for first-time implementation.

Raftelis will also assist the City in outlining the overall regulatory process to adopt new impact fees with assistance and review from the City's Staff and the City's legal counsel. This assistance will include providing general input for the City's consideration (and ultimate decision) on required notices, public hearings, interdepartmental coordination with stakeholders, impact fee credits, and fee implementation. Any recommendations here will be subject to final review and approval by City Staff and the City's legal Counsel before any actions are taken.

This task will also include in person physical attendance of up to four (4) public meetings (one set of one-on-ones with the City Council to review the analysis and address questions, one public workshop to present the fees publicly and get the City Councils direction on how to proceed with implementation, and attendance of up to two public hearings to approve and implement the study) with the City to present the results of the study. We will tailor the City Council presentations to address the key objectives of the study and demonstrate how the proposed impact fees are defensible and reasonable based on recent and localized data, and compare the proposed fees with those of other municipalities.

Project Deliverables

The deliverables to be provided in this engagement include the following items:

- Impact fee initial data request
- Fee comparisons with other jurisdictions
- Briefing document to summarize analysis and proposed fees
- Impact fee study report (draft and final versions)
- Comments on draft impact fee ordinances as drafted by the city's legal counsel

City Staff Assistance

The following is a list of the tasks anticipated to be performed by the staff of the City to assist Raftelis in providing the services on a timely basis. It should be noted that time estimates associated with these supporting tasks can vary materially between client engagements, such as accounting record-keeping systems, response call tracking systems, customer billing data systems, and other systems or files that need to be queried to provide the required data.

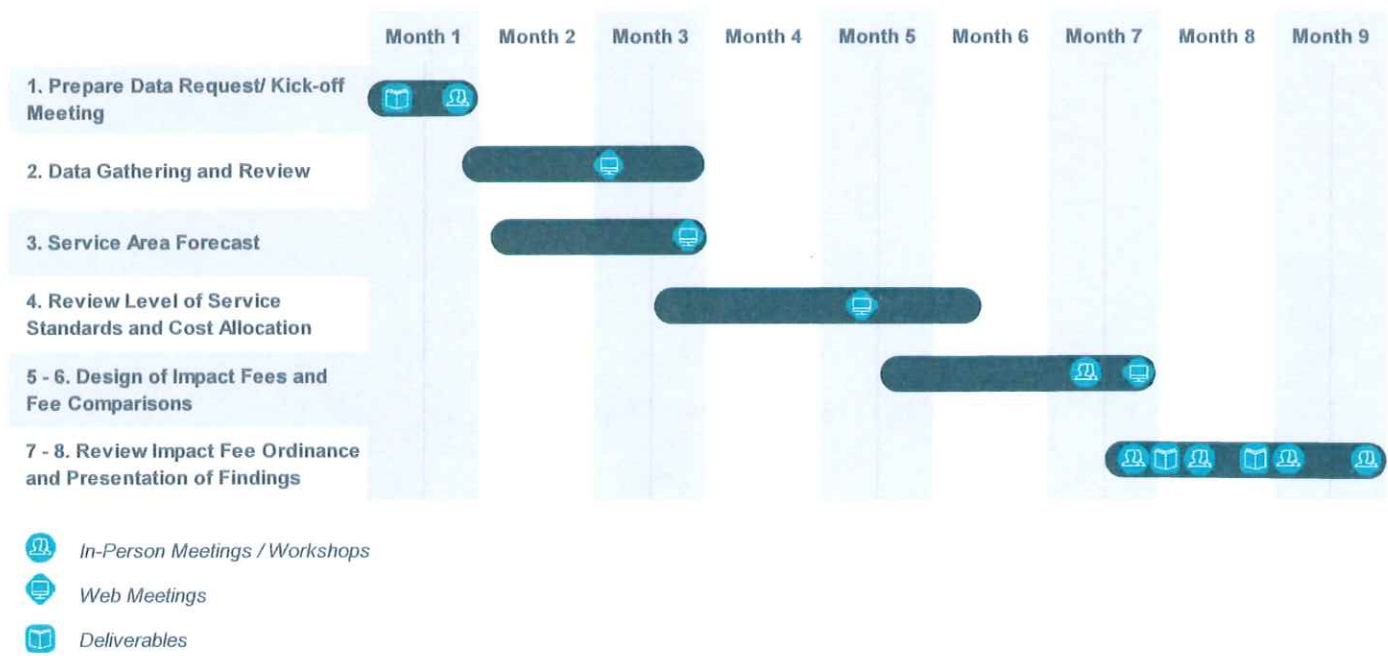
Internal discussions on policy directives can vary, and overall staff scheduling availability can differ as well. That said, we might generally estimate the following rough time commitments from the City for the items below as follows:

- The gathering of specific operational, capital and facility data and information: **8 – 12 hours**
- Assistance with compiling data if not in a usable format from the records and reports of the City: **Varies**
- Assistance in the formulation of policy or strategy decisions: **4 – 6 hours**
- Assistance in the public relations program and scheduling of meetings to review results: **2 – 4 hours**
- General review and comments on the results of our analyses and reports to the City: **4 – 8 hours**

Schedule

Raftelis will complete the scope of services within the timeframe shown in the schedule below, assuming a notice-to-proceed by the beginning of June 2026, timely receipt of necessary data, and the ability to schedule meetings as necessary. Project completion is estimated for February 2027.

If the City elects to extend the project completion schedule beyond the initial timeframe, we will work with City staff to identify any necessary revisions to the project budget.



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PROJECT COST



City of Neptune Beach - RFP Price Submittal Form

RFP Title: Impact Fees Study

RFP Number: RFP #2026-01

Department: City Clerk's Office

Submission Due Date/Time: May 1, 2026 - 2:00 PM EST

Vendor/Proposer Legal Name: Raftelis Financial Consultants, Inc.

FEIN/Tax ID: 20-1054069

Primary Contact Name & Title: Shawn Ocasio

Phone: 407.628.2600 **Email:** socasio@raftelis.com

Mailing Address: 341 N. Maitland Avenue, Suite 300, Maitland, FL 32751

1) Pricing Summary

Enter your proposed total price and indicate the pricing basis (e.g., lump sum, not-to-exceed, time-and-materials).

- **Total Proposed Price (USD):** \$ \$120,000 (see following pages for pricing details)
- **Pricing Basis:** Lump Sum Not-to-Exceed Time & Materials Other:
- **Price Valid Through:** September, 30, 2026 (minimum 120 days recommended)

2) Lump Sum Breakdown (if applicable)

Provide major cost components to support the total price.

Cost Component	Description/Scope Covered	Amount (USD)
Labor (prime)		\$
Subconsultants/Subcontractors		\$
Materials & Supplies		\$

Cost Component	Description/Scope Covered	Amount (USD)
Equipment		\$
Travel / Per Diem		\$
Reimbursable Expenses		\$
Overhead & Profit		\$
Contingency		\$
Other (specify)		\$
Lump Sum Total		\$

3) Unit Price Schedule (if applicable)

List unit prices for items/services. Unit prices include labor, materials, equipment, overhead & profit.

Item No.	Description	Unit of Measure	Estimated Quantity	Unit Price (USD)	Extended Price (USD)
1				\$	\$
2				\$	\$
3				\$	\$
Unit Price Subtotal					\$

4) Hourly Rates / Professional Services (if applicable)

Provide fully burdened hourly rates (inclusive of overhead & profit).

Labor Category / Title	Rate (USD/hour)	Estimated Hours	Notes (e.g., on-site/off-site)
Project Manager	\$		
Senior Engineer/Planner	\$		
Analyst/Technician	\$		
Administrative Support	\$		
Other (specify)	\$		

- **Total Estimated Hours:** _____
- **Estimated Services Total (USD):** \$ _____

5) Schedule & Delivery

- **Number of Calendar Days to Start After Notice to Proceed:** 7 to 14 Days
- **Number of Calendar Days to Substantial Completion (or Milestones):**
Approximately 180 Days
- **Key Milestones (if applicable):**
 - Milestone 1: Project Kickoff Meeting Date/Days: Approx. 30 Days
 - Milestone 2: Prelim. Results Meeting Date/Days: Approx. 90-120 Days
 - Milestone 3: Final Report Submittal Date/Days: Approx. 150-180 Days

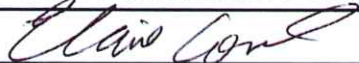
Certification & Signature

By signing below, the undersigned certifies that:

- This Price Submittal reflects all costs required to fulfill the scope of services/work described in the RFP;
- Prices are firm for the validity period stated;
- The proposer has reviewed and acknowledges all addenda;
- The proposer agrees to comply with applicable laws and regulations, including local, state, and federal requirements; and
- The proposer is authorized to bind the firm.

Authorized Representative Name & Title:

Elaine Conti - Chief Administrative Officer

Signature:  **Date:** April 27, 2026

Company Name: Raftelis Financial Consultants, Inc.

Address: 227 W. Trade St., Suite 1400 Charlotte, NC 28202

Phone: 704-373-1199 **Email:** econti@raftelis.com

PROJECT COST / FEE BREAKDOWN

City of Neptune Beach - Impact Fees Study

Tasks	Number of Onsite Meetings	Hours							Total	Total Fees & Expenses
		HT	SO	JW	MG	TT	TD	Admin		
1. Prepare Data Request/ Kick-off Meeting	1	8	8	8	2	0	0	2	28	\$10,045
2. Data Gathering and Review		0	4	2	16	4	6	0	32	\$8,360
3. Service Area Forecast		0	4	2	10	8	10	0	34	\$8,500
4. Review Level of Service Standards and Cost Allocation		2	12	4	28	14	46	0	106	\$25,850
5 - 6. Design of Impact Fees and Fee Comparisons	1	2	20	16	16	10	30	0	94	\$26,315
7 - 8. Review Impact Fee Ordinance and Presentation of Findings	4	4	42	38	24	4	6	8	126	\$40,880
	6	16	90	70	96	40	98	10	420	
Hourly Billing Rate		\$400	\$340	\$375	\$260	\$230	\$195	\$100		
Total Professional Fees		\$6,400	\$30,600	\$26,250	\$24,960	\$9,200	\$19,110	\$1,000	\$117,520	

HT - Henry Thomas
 SO - Shawn Ocasio
 JW - Joe Williams
 MG - Michelle Galvin
 TT - Tristen Townsend
 TD - Timothy Du
 Admin - Administrative Staff

Total Fees	\$117,520
Total Expenses	\$2,480
Total Fees & Expenses	\$120,000

EXCEPTIONS

Exceptions

We request that the City consider making the following modifications, shown in red below, to the Professional Services Agreement. Please contact us if you have any questions or concerns about these modifications.

BONDS

N/A

13. INDEMNIFICATION AND INSURANCE

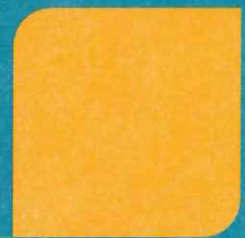
INDEMNIFICATION

The parties recognize that FIRM/LESSOR is an independent Contractor. FIRM/LESSOR agrees to assume liability for and indemnify, hold harmless, and defend the CITY, its councilors, mayor, officers, **and** employees, ~~agents, and attorneys of,~~ from, and against all liability and expense, including reasonable attorney’s fees, in connection with ~~any and~~ all claims, demands, damages, actions, causes of action, and suits in equity ~~of whatever kind or nature,~~ including claims for personal injury, property damage, ~~or~~ equitable relief, ~~or loss of use, arising directly or indirectly out of or in connection with any~~ each case to the extent caused by the negligent ~~and/or deliberate~~ act or omission of FIRM/LESSOR, its officers, employees, agents, and representatives ~~in the performance of services hereunder.~~ FIRM/LESSOR's liability hereunder must include all attorney’s fees and costs incurred by the CITY in the enforcement of this indemnification provision. This includes claims made by the employees of FIRM/LESSOR against the CITY and FIRM/LESSOR hereby waives its entitlement, if any, to immunity under Section 440.11, Florida Statutes. The obligations contained in this provision will survive termination of this Agreement and will not be limited by the amount of any insurance required to be obtained or maintained under this Agreement. Nothing contained in the foregoing indemnification will be construed to be a waiver of any immunity or limitation of liability the CITY may have under the doctrine of sovereign immunity or Section 768.28, Florida Statutes. ~~FIRM/LESSOR may rely on all information provided by or on behalf of the City to perform the work under this Contract. The parties hereto acknowledge and agree that FIRM/LESSOR does not guarantee any outcomes or results, and FIRM/LESSOR does not legislate, practice law or provide legal advice.~~

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APPENDIX A: RESUMES

Appendix A: Resumes



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Henry Thomas

PROJECT DIRECTOR
Senior Vice President

ROLE

Henry will provide strategic oversight and QA/QC for the project, ensuring it meets both Raftelis and industry standards.

PROFILE

Henry has over 47 years of utility industry rate and financial experience focusing on business issues facing water, wastewater, solid waste, natural gas, electric, and stormwater utilities. Henry’s experience includes directing financial consulting services for publicly-owned utilities and governmental entities. He has been responsible for preparing utility rate and cost-of-service studies, business plans, bond feasibility studies, designing water conservation rates, connection and development fees, municipal impact fees, developing utility financial policies and assisting with the acquisition of utility properties and other management consulting services. During his career, he has served over one hundred and twenty clients including county and municipal governments and publicly-owned utility districts, authorities, and cooperatives.

KEY PROJECT EXPERIENCE

City of Lakeland (FL): Utility Rate, Financial Planning, and Management Consulting Services

Henry has served the City of Lakeland (City) since 2009 providing utility rate, financial planning, and management consulting services to the water and wastewater utility systems. On behalf of the City, Henry has directed a comprehensive cost-of-service/rate study and annual revenue sufficiency updates. Major issues addressed for the City include water conservation rates and rate structures that promote revenue stability and evaluating the size and timing of capital projects.

Polk County (FL): Utility Rate, Financial Planning, and Management Consulting Services

Henry has served Polk County since 2013 providing utility rate, financial planning, and management consulting services to the water and wastewater systems. His experience includes directing utility rate and cost-of-service studies including the development of water conservation rate structures and preparing bond feasibility studies.

Charlotte County (FL): Utility Rate, Financial Planning, and Management Consulting Services

Henry has served Charlotte County Utilities (County) since 1996 providing utility rate, financial planning, and management consulting services to the County’s water and wastewater systems. As part of this ongoing engagement Henry has directed comprehensive water and wastewater rate studies, bond feasibility studies, utility valuations, impact fee studies and assisted in the development of water conservation rates and utility expansion policies and the evaluation of wholesale rate issues related to the Peace River/Manasota Water Supply.

City of Valdosta (GA): Utility Rate and Financial Planning Services

Henry has worked for the City of Valdosta (City) since 1998 providing utility rate and financial planning services to the City’s water and sewer system. His experience with the City of Valdosta includes preparing a water and sewer master plan capital funding analysis, a comprehensive water and sewer rate study, including implementation of



Specialties

- Business/strategic plans
- Cost-of-service & rate studies
- Bond financing
- Water conservation rates
- Contract negotiation
- Utility acquisitions
- Development fees
- Municipal impact fees

Professional History

- Raftelis: Senior Vice President (2025-present); Vice President (2019-present); Senior Vice President, PRMG (1994-2019)

Education

- Bachelor of Science in Business Administration, Economics - University of Florida (1977)

Professional Memberships

- Florida Government Finance Officers Association
- AWWA

significant water conservation rate structures phased-in over a multi-year period, and several rate sufficiency updates to ensure that the City's water and sewer utility rates are adequate to fund operating and capital needs, and maintain a sound financial position.

City of Ocala (FL): Utility Rate, Financial Planning, and Management Consulting Services

Henry has served the City of Ocala since 1992 providing utility rate, financial planning, and management consulting services to the water and wastewater systems. Henry has directed comprehensive water and wastewater cost-of-service/rate studies and annual revenue sufficiency updates for the City. He has also been involved in the development of system development charges, water conservation rates and strategies related to providing incentives for growth and economic development.

City of Tampa (FL): Utility Rate Consulting Services

Henry has served the City of Tampa since 2005. He has directed comprehensive, water, wastewater and solid waste rate studies, and annual revenue sufficiency updates, developed capital charges related to new development, participated in City's water and wastewater master planning process to evaluate the financial impact of capital projects and prepared bond feasibility studies associated with the issuance of long-term debt.

City of Titusville (FL): Utility Rate Consulting Services

Henry has served the City of Titusville, Florida since 2000. He has directed comprehensive water and wastewater rate studies and annual revenue sufficiency updates. In addition, he has been involved in providing capital funding plans for State Revolving Loans from the State of Florida, Department of Environmental Protection (FDEP) and assisted in negotiations related to the formation of a joint public/private entity to provide future water supplies for the City.

LITIGATION EXPERIENCE

Henry has directed regulatory rate cases for the Virgin Islands Water and Power Authority and Charlotte County, Florida and has testified before the Florida Public Service Commission, the Indiana Public Service Commission, the Virgin Islands Public Services Commission, and District Courts in Florida and Michigan.

PUBLICATIONS

- "Utility Impact Fees: Practices and Challenges" AWWA, 2013
- "Water and Wastewater Impact Fees," South Carolina Section of the AWWA, Management Forum, 2001
- "Innovative Water Rates," North Florida Section of the AWWA, 2011

PRESENTATIONS

- "Electric Utility Rates in a Competitive Environment," National Rural Electric Cooperative Association (NRECA) Managers Conference, 1995
- "Innovative Electric Rates," NRECA Marketing, Member Services and Communication Conference, 1995
- "Electric Utility Rate Making," NRECA National Directors Conference, 1996
- "Water Rates and Conservation Practices," Florida Water Resources Association Conference, 2007
- "Communicating Water Utility Rate Needs," Florida Rural Water Association's Annual Technical and Training Conference, 2010

PROFESSIONAL HONORS

- AWWA Management and Leadership Division's 2013 Best Paper Award

Shawn Ocasio

PROJECT MANAGER Senior Manager

ROLE

Shawn will manage the day-to-day aspects of the project ensuring it is within budget, on schedule, and effectively meets the City's objectives. He will also lead the consulting staff in conducting analyses and preparing deliverables for the project. Shawn will serve as the City's main point of contact for the project.

PROFILE

Shawn has 16 years of rate and financial consulting experience and has participated on a variety of projects for water, wastewater, reclaimed water, stormwater, and solid waste management utility enterprise systems throughout Florida, Georgia, Alabama, and Virginia. These projects have included revenue sufficiency analyses, cost of service rate design and utility miscellaneous fee design studies, retail and wholesale water rate design engagements, bond feasibility studies, general fund indirect cost allocation analyses, and customer bill impact evaluations. Another area of focus for Shawn is in the development of general government and utility impact fees. He has developed impact fees for police, fire/rescue, parks and recreation, libraries, and general government/administrative municipal services as well as water, wastewater, and reclaimed water utility services for municipal clients updating existing fees and/or implementing fees for the first time.

KEY PROJECT EXPERIENCE

City of Ormond Beach (FL): Municipal Impact Fee and Utility Connection Fee Study

Shawn conducted a comprehensive analysis to update the City of Ormond Beach's water and wastewater utility connection fees, as well as its parks and recreation, stormwater, and transportation (local roads and mobility fees) impact fees. To execute this project, Shawn collaborated with a transportation engineering consultant and an impact fee attorney to address transportation impact fees and provide related legal guidance. The study encompassed a review of the City's Level Of Service (LOS) standards for all utility and municipal services, an analysis of historical population trends and future population and dwelling unit projections, and an evaluation of existing and future capital investments to accommodate new growth. Impact fees were developed for both residential and nonresidential property types. Additionally, the study included a feasibility analysis to determine the viability of implementing new police and fire impact fees, culminating in the development of proposed fees for these services. Shawn also contributed to the review of draft impact fee ordinances prepared by the City's legal counsel and participated in public workshops and City Commission hearings to present the fee analysis, key observations and assumptions, fee application methodologies, and proposed impact and connection fees. The study's recommendations were well received and implemented by the City's Commission.

City of Clermont (FL): Municipal and Utility Impact Fee Study

Shawn has participated in two studies (most recently in 2023) on behalf of the City of Clermont (City) examining the impact fees for water, wastewater, police, fire rescue, and parks and recreation services. Both of these studies involved reviewing the City's current Levels of Service (LOS), analyzing and projecting population growth and



Specialties

- Computer financial model development
- Revenue sufficiency analyses
- Cost-of-service & rate studies
- Retail and wholesale rate design
- Financing feasibility analyses
- Utility connection/development fees
- Municipal impact fees

Professional History

- Raftelis: Senior Manager (2025-present); Manager (2021-2024); Senior Consultant (2019-2020); Rate Consultant, PRMG (2009-2019)

Education

- Bachelor of Science in Business Administration in Accounting & Finance - University of Central Florida (2008)

Professional Memberships

- AWWA
- Florida Government Finance Officers Association

residential dwelling units, reviewing current residential occupancy factors, as well as assessing existing assets and future expansion related capital needs to accommodate new growth and development. Based on this analysis, proposed impact fees were developed for both residential and nonresidential properties. The findings and recommendations were presented before the City Commission and were successfully implemented by the City.

City of Longwood (FL): Police, Fire Rescue, Recreation, and Administrative / Public Works Impact Fee Study

Shawn performed an impact fee study for the City of Longwood's (City) police, fire rescue, recreation, and administrative / public works services. The study included an analysis of historical population and unit growth trends, the development of a forecast of projected residential and nonresidential growth as well as a review of existing Levels of Service (LOS), current and planned capital facilities, development of functional population-based factors based on trip generation and City demographic information, and the design of the fees by service type and customer class. Shawn also developed the detailed study disclosure report and supporting presentation briefing documents for usage in the public hearings and presented the results to the City's leadership. The proposed fees resulting from this analysis were successfully adopted by the City and subsequently implemented.

City of Lake Wales (FL): Water, Wastewater, Police, Fire Rescue, Parks and Recreation, and Library Impact Fees

Shawn conducted a study of the water, wastewater, police, fire rescue, parks and recreation, and library impact fees for the City. The study included a review of the City's existing Levels of Service (LOS), an analysis and projection of population and dwelling units, and an evaluation of existing assets and future capital requirements to serve new growth. Proposed Impact fees were then developed for residential and nonresidential property types. The results of the study were subsequently presented to City leadership the proposed impact fees were successfully adopted and implemented.

City of Winter Garden (FL): Police, Fire Protection, and Recreational Municipal Impact Fees

Shawn has assisted in an analysis of the City of Winter Garden's (City) police, fire protection, and recreational municipal impact fees. During this project, he performed an analysis of population projections, dwelling unit relationships, and developed corresponding growth projections. He also assisted in discussions with the City regarding the determination of level of service (LOS) standards and the capital requirements needed to serve new development. Shawn then assisted in the design of the impact fees for the residential and non-residential customer classes. The proposed fees were successfully implemented as a result of this study.

City of Oakland Park (FL): Utility and Municipal Impact Fee Feasibility Analysis and Recreation Fee Updates

Shawn performed an impact fee feasibility analysis for the City of Oakland Park's (City) stormwater, solid waste, police, fire/EMS, library, general government and parks and recreation services. This feasibility analysis included a review of capital cost information, level of service criteria, typical/hypothetical fee levels, industry standards and norms and typical application methods for stormwater, solid waste, police, fire/EMS, library, general government and parks and recreation impact fees. This analysis then included a review of the type and extent of the City's anticipated development to develop an estimate of potential revenues to assess the potential benefit to the City of implementing the various impact fees. Based on the results of the feasibility analysis, Shawn then completed a parks and recreation impact fee study for the City. Since the initial study Shawn has also performed an update to the City's parks and recreation impact fees which resulted in a successful adoption of the proposed revised fees.

City of Miramar (FL): Police, Fire Protection, and Recreational Municipal Impact Fee Study

Shawn conducted a municipal impact fee study for the City of Miramar (City) that included fees associated with police, fire protection, and recreational services. This study included an analysis of growth and population

projections, dwelling units, call data, and Level of Service (LOS) standards, and existing and planned capital facilities. For police and fire protection services the impact fees were designed for residential and non-residential classes of customers. The fees designed in the recreation services analysis were for residential customers only and included the development of a recreation impact fee for facilities and a separate community parks land dedication fee for land for properties not covered by a land donation agreement. Shawn has also assisted in the performance of stormwater revenue sufficiency studies for the City. These studies included developing projections of operating expenses, revenues, capital funding and then evaluation of the overall revenue sufficiency of the system and developing rate recommendations for implementation.

PRESENTATIONS

- “Municipal and Utility Impact Fees” Presentation to the Gulf Coast Chapter of Florida Governmental Financial Officers Association (FGFOA), 2024
- “Growth on the Gulf: Navigating Municipal and Utility Impact Fees in Florida” Presentation to the Gulf Coast Chapter of Florida Governmental Financial Officers Association (FGFOA), 2026

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Joe Williams

TRANSPORTATION SUBJECT MATTER EXPERT Vice President

ROLE

Joe will provide input and guidance as a Subject Matter Expert for the transportation components of this project.

PROFILE

Joe currently serves as a Vice President in Raftelis' Maitland, FL office. He has over 13 years of experience in financial, management, and rate consulting for utility and other municipal clients. His expertise lies in the areas of developing utility rate studies, impact fees, bond feasibility reports, building fees, miscellaneous fees, and other related financial solutions based on technical analysis and unique needs of each client. He has worked with staff, leadership, and governing bodies for municipal utilities to find solutions to financial and managerial issues that can arise in providing sustainable and effective service delivery.

KEY PROJECT EXPERIENCE

City of Kissimmee (FL): Impact Fee Study

The City of Kissimmee (City) hired Raftelis in 2023 to perform a comprehensive study for the City's existing parks and recreation impact fees, including an evaluation to add impact fees for police and fire protection services. Prior to this study, the City did not charge impact fees for police and fire services. The City is located in Osceola County, in close proximity to Disney World and other tourism driving attractions and has been seeing significant growth and demands for services over the past ten years. Joe was the project manager serving alongside the City to develop impact fee calculations based on the City's existing infrastructure as well as future improvements that would be provided to serve growth over the next 10-years. Using a functional population approach, whereby the demands for service from different types of development can be derived, Raftelis developed a fee schedule for the City that met their needs and addressed several types of development that were expected in the future. Joe assisted with implementation of impact fees, including a comprehensive technical report, and presentations to City Council during workshops and public hearings that led to the ultimate adoption of new and updated impact fees.

City of Palatka (FL): Impact Fee Study

The City of Palatka (City) retained Raftelis 2022 to update the impact fees based on recent and local costs, as their last impact fee studies were performed in the 2007 timeframe. Additionally, the impact fees had been under a moratorium since 2008 or 2009 coinciding with the last major recession. Since the Florida Impact Fee Act has increased in stringency over the past several years, the City felt it was necessary to perform a study prior to re-establishing their impact fee program. The City charges impact fees for police, fire, parks and recreation, transportation, water, and wastewater services. Joe was the project manager serving alongside the City to develop impact fee calculations based on the City's existing infrastructure as well as future improvements that would be provided to serve growth over the next 10-years. The City is anticipating future growth to begin materializing as other communities to the East and West continue expanding. In order to maintain a high quality of service, the City has identified projects and investments necessary to accommodate new growth, which have been reflected in the



Specialties

- Impact fee studies (Utility and Municipal)
- Utility cost of service and rate structure studies
- Bond feasibility reports
- Long range financial planning and feasibility studies
- Utility rate surveys

Professional History

- Raftelis: Vice President (2026 – present) Senior Manager (2023-2025); Manager (2020-2022); Senior Consultant (2018-2019); Consultant (2015-2017); Associate Consultant (2013-2014); Analyst (2012)

Education

- Master of Business Administration - University of Central Florida (2018)
- Bachelor of Science in Business Administration (Financing & Accounting) - University of Central Florida (2012)

impact fee calculations. Several alternatives were reviewed for assessing impact fees to growth including a more nuanced approach with an expanded number of land uses versus the more simple to administer per square foot of development approach. Joe assisted with implementation of impact fees, including a comprehensive technical report, and presentations to City Council during workshops and public hearings.

City of Lake Alfred (FL): Impact Fee Study

The City of Lake Alfred (City) retained Raftelis 2022 to update the impact fees based on recent and local costs, as well as significant constraints and alternative water needs pursuant to local growth and water availability. Raftelis initially established the City's impact fees in 2018 including the public safety (police and fire services), parks and recreation, public facilities, water, and wastewater impact fees. The City is anticipating significant growth and desired an update to the impact fees to reflect the current costs of providing service along with the ability to reflect the current level of service provided to existing development. In order to maintain a high quality of service, the City has identified future projects and investments necessary to accommodate new growth, which have been reflected in the impact fee calculations. Several alternatives were reviewed for assessing impact fees to growth including a more nuanced approach with an expanded number of land uses versus the more simple to administer per square foot of development approach. Joe was the project manager and assisted with implementation of impact fees, including a comprehensive technical report and presentation to City Council.

City of Port Orange (FL): Impact Fee Study, Financial Planning Study

The City of Port Orange (City) hired Raftelis in 2022 to perform a comprehensive financial update for the City's enterprise funds and impact fees, including services of water and wastewater as well as police, fire, transportation, and parks and recreation. Prior to this study, the City did not charge impact fees for police services. Joe served as the project manager developing the police, fire, parks and recreation, and the transportation impact fees. The transportation impact fees were calculated by a subconsultant, under Joe's supervision. Using a functional population approach, whereby the demands for service from different types of development can be derived, Raftelis developed a fee schedule for the City that met their needs and addressed several types of development that were expected in the future. The City is still working through the adoption process of the fees, but they are anticipated to be enacted in the near future.

City of Auburndale (FL): Impact Fee Study, Water and Wastewater Rate Study

The City of Auburndale (City) has been working with Joe and Raftelis for many years on utility financial assistance. In 2021 and 2022, the City retained Raftelis to perform a comprehensive water and wastewater rate study as well as an update to the capital/impact fees charged to new development. Additionally, Raftelis was hired to update the City's police, fire, and parks and recreation impact fees. Through an in-depth review of the City's plans for future development, capital improvements, and the levels of service provided to existing residents and business, an impact fee program was developed that met the specific needs of the City. Since the impact fees in place prior to this study had not been updated in many years, there were large increases to the fee levels reflecting the current cost of providing additional projects and improvements as new development continues. Joe served as the project manager for both of these engagements. All of the impact fees were adopted pursuant to the recommendations of the study.

City of Wilton Manors (FL): Connection Fee Study, Impact Fee Study

In 2021 the City of Wilton Manors (City) hired Raftelis to perform a utility connection fee and municipal impact fee study. The utility connection fee study included the addition of a water connection fee and update of the wastewater connection fee. Each of the utility connection fees are designed to capture the cost of constructing and expanded the transmission systems to accommodate increased demands from new development and redevelopment. The municipal impact fee study included updates to the police, fire, and parks and recreation impact fees as well as establishment of general government and library impact fees. The City is experiencing infill development and

redevelopment activities and therefore the fees were crafted to best capture the additional demands anticipated. With significant redevelopment occurring, the City had to consider the appropriate credits that would apply to existing development as well as the best fit fee structure for charging based on incremental demands on each service. Joe served as the project manager for this study and worked closely with the City to craft the desired fee programs. All of the impact fees were adopted pursuant to the recommendations of the study.

City of New Smyrna Beach (FL): Impact Fee Study

The City of New Smyrna Beach (City) retained Raftelis in 2021 to update the police, fire, and parks and recreation impact fees to reflect the current costs of providing the necessary infrastructure and to meet the demands of growth. The City has unique characteristics in that it is a historical coastal community and is transitioning more towards inland development of annexed areas. The City has a high transient population with significant AirBNB and similar short term rental situations that are creating increased demands on the City's services, with minor redevelopment activity. This was addressed through the fee calculations as well as updating the cost recovery to match future needs.

City of Sanford (FL): Impact Fee Study

The City of Sanford (City) originally hired Raftelis in 2014 to develop new police protection and fire services impact fees. The City desired a more nuanced approach with an expanded offering of land uses so Joe assisted with implementation of impact fees using a functional population basis. Recently in 2021, the City engaged Raftelis again to update the police and fire impact fees, as well as the parks and recreation impact fees. The updated fees allowed the City to more equitably assess properties based on the potential demand they placed on specific services. Joe served as the project manager and worked closely with City staff to obtain, review and analyze all necessary data to develop the appropriate criteria.

City of St. Cloud (FL): Impact Fee Study

The City of St. Cloud (City) hired Raftelis in 2020 to perform a comprehensive study for the City's existing police, fire, parks and recreation, and mobility impact fees. Based on the continued rapid expansion of new single family and multi-family development the City had identified several large investments into a new police headquarters building, fire stations, and park master plan projects. Each of these projects (amongst others) were evaluated to determine the proportional share between existing development and new development to establish fair share cost apportionments and levels of service, and to establish a reasonable dual-rational nexus test for all fee areas. The City is located to the South of Orlando in Osceola County, which has been growing rapidly for the past ten years. Using a functional population approach, whereby the demands for service from different types of development can be derived, Raftelis developed a fee schedule for the City that met their needs and addressed several types of development that were expected in the future. Raftelis assisted with implementation of impact fees, including a comprehensive technical report, and presentations to City Council during workshops and public hearings that led to the ultimate adoption of new and updated impact fees.

City of Denison (TX): Impact Fee Study

The City of Denison (City) retained Raftelis to establish new impact fees for water, wastewater, and transportation facilities in an effort to provide adequate funding for the City's infrastructure investments required to accommodate growth and provide the appropriate level of service. Joe led the transportation impact fee development, working with the City's staff and consulting engineers, and has attended multiple City meetings to present the fees for adoption. The land use forecast and CIP cover a period of 10-years, with detailed forecasts supporting demand requirements as well as the capacity provided by the future investments to serve this new development. The Texas state statute identifies several constraints and limitations on calculating impact fees, which were navigated by the project team to provide the necessary road improvements.

City of Goodyear (AZ): Development Impact Fee Study

Joe was the lead consultant for an update to the City of Goodyear's (City) development impact fees. This project includes an update to the Land Use Assumptions (LUA), Infrastructure Improvements Plan (IIP) and development fees for police, fire, recreation, streets, water and wastewater services. A majority of the fees in the City are divided into two service areas, due to a unique arrangement with a large land-owner south of the Gila River. Throughout the course of this study Joe worked closely with the City to review alternative assumptions and approaches in order to provide additional information to Council and the development community. The fees developed used various impact fee calculation approaches (buy-in, incremental capacity, hybrid) based on the circumstances each department was operating under. The IIP, LUA, and development impact fee report was posted to the City's website (in accordance with state statute) and the fees became effective in April 2019.

Town of Gilbert (AZ): Development Impact Fee Study

Joe was the lead consultant for an update to the Town of Gilbert's (Town) system development fees. This project includes an update to the Land Use Assumptions (LUA), Infrastructure Improvements Plan (IIP) and development fees for police, fire, recreation, streets, general government, water and wastewater services. Due to arrangements for sharing wastewater facilities with another city, the Town has two services areas for the wastewater fees. The final IIP, LUA and system development fees report was provided to the Town in March 2019. Joe worked closely with staff, as the primary point of contact for data and analysis, to expedite the update of this study due to time constraints provided in the state impact fee statutes.

City of Phoenix (AZ): Development Impact Fee Study

Joe was the lead analyst for the Biennial Audit of land use assumptions (LUA), infrastructure improvements plan (IIP) and development impact fees (DIFs) study being completed for the City of Phoenix (City). The City assesses libraries, parks, fire protection, police, major arterials (roadway facilities), stormwater, water, wastewater and water resource development impact fees, implemented in 2015 in compliance with the requirements of Arizona Revised Statutes (ARS §9-463.05). The water resource development impact fee is assessed throughout the City while the eight other development impact fees are assessed within growing areas in the City that vary within eight different service areas. Joe led project analysis working directly with City staff and the Raftelis project manager to audit revenues and expenses compared to the adopted fee schedules, IIP-eligible improvements, and reviewing the land use assumptions forecast as well as documenting study results. Study findings are documented in a final report, completed in May 2018.

City of Scottsdale (AZ): Development Impact Fee Study

Joe was the project manager for the biennial audit of land use assumptions (LUA), infrastructure improvements plan (IIP) and development impact fees (DIFs) study being completed for the City of Scottsdale (City). The City assesses water and wastewater development impact fees, implemented in 2014 in compliance with the requirements of Arizona Revised Statutes (ARS §9-463.05). Joe led project analysis working directly with City staff and the Raftelis project manager to audit revenues and expenses compared to the adopted fee schedules, IIP-eligible improvements, and reviewing the land use assumptions forecast as well as documenting study results. Study findings are documented in a final report, completed in February 2019.

City of Mascotte (FL): Impact Fee Study

In 2017, the City of Mascotte (City) retained Raftelis to establish new impact fees for water, police, fire, and parks and recreation impact fees. Joe served as an analyst on this project and supported the project manager with the data collection, analysis and implementation of the impact fees for the City in September 2017. The City was anticipating growth of over 30% over a 10- to 12-year period, resulting in a need for infrastructure expansion to support the services provided. The fees developed used various impact fee calculation approaches (buy-in, incremental capacity,

hybrid) based on the circumstances presented to each department in order to provide service to a significant level of growth.

City of Montverde (FL): Impact Fee Study

In 2017, the City of Montverde (City) retained Raftelis to establish new impact fees for parks and recreation, transportation, fire and administrative impact fees. Joe served as an analyst on this project and supported the project manager with the data collection, analysis and implementation of the impact fees for the City in September 2017. The City desired review of the anticipated timing and funding of capital infrastructure since it is common for municipalities to make investments prior to all growth materializing. Through this analysis, potential alternate funding sources were identified including grants, discretionary sales taxes, and debt funding.

City of Minneola (FL): Impact Fee Study

In 2015, Raftelis was engaged by the City of Minneola (City) to review and update the fire, police and parks impact fees. The City desired review of alternative impact fee calculation approaches such as implementation of a functional population basis. Joe assisted with the data collection, analysis and implementation of the impact fees for the City in April 2016.

Town of Oakland (FL): Impact Fee Study

Raftelis has been engaged with the Town of Oakland (Town) since 2013 and has assisted with a wide variety of financial projects. Joe has been involved in numerous impact fee projects for the Town including Water, Wastewater, Police, Administrative, Parks, and Transportation. Each of the non-utility impact fees were implemented utilizing a functional population basis to facilitate equitable recovery from each property. Joe has also assisted in a recent update to the Parks impact fee, factoring in significant new project costs for a trail network and museum.

City of Winter Springs (FL): Impact Fee Study

Joe has been involved with impact fee projects for the City of Winter Springs (City) since 2014. Raftelis previously updated the City's fire and transportation impact fees, assisting with implementation of a functional population approach for transportation. The City also engaged with Raftelis to evaluate the appropriate police and recreation impact fees, which included a review of the appropriateness of implementing a functional population approach. The transportation impact fees were adopted December 2016, and the police and parks impact fees were adopted September 2017.

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Michelle Galvin

LEAD CONSULTANT
Senior Consultant

ROLE

Michelle will serve as the Lead Consultant and will work at the direction of Shawn to conduct analyses and preparing deliverables for the project.

PROFILE

With a background in statistical analysis and surveying, Michelle joined Raftelis as an intern in 2018, and later became a Consultant upon graduating from the University of Central Florida in May 2019. Her primary expertise includes municipal impact fee development, utility financial and rate analyses, functional population, and customer billing statistics.

KEY PROJECT EXPERIENCE

City of Groveland (FL): Utility Rate and Connection Fee Study

Raftelis has partnered with the City of Groveland (City) to provide strategic financial and rate-setting guidance for its utility systems. Recently, Raftelis conducted a comprehensive 2024 utility rate and connection fee study for the City’s water, wastewater, and reclaimed water systems.

A primary objective of the study was to develop a multi-year rate plan to fund over \$260 million in critical capital projects, including the construction of the Villa City Wastewater Treatment Plant and the expansion of the Sampey Wastewater Treatment Plant. The rate study featured a modernization of the City’s rate structure, which included removing minimum gallon allowances from base charges and implementing inclining block rates to promote conservation while maintaining revenue stability. These adjustments were designed to ensure that bill impacts for low-volume users were mitigated while providing equitable cost recovery across all customer classes.

Additionally, Raftelis performed a connection fee analysis to align the City’s capacity charges with current local cost data. This effort ensures a "growth pays for growth" approach, recovering a proportional share of capital costs from new development to limit the burden on existing ratepayers. The 2024 utility rates and updated connection fees were both successfully adopted by the City.

City of Daytona Beach (FL): Utility Rate and Connection Fee Study, Municipal Impact Fee Study

Raftelis has partnered with the City of Daytona Beach (City) for several years to provide strategic financial planning and rate-setting services, with a primary focus on ensuring the long-term revenue sufficiency of its utility systems.

This engagement centers on conducting comprehensive utility revenue sufficiency studies for the City’s water and wastewater systems. These efforts involve updating financial forecasts to account for population growth and significant inflationary pressures on operations and maintenance costs. Raftelis works closely with City staff to evaluate multi-year capital funding requirements and identify sustainable rate adjustments that ensure the utility remains on a sound financial footing while maintaining high levels of service for both existing and future customers.

Complementing the utility financial planning, Raftelis also completed a 2025 Municipal Impact Fee Study for police, fire, parks and recreation, and general government services. A critical component of this work was the

Specialties

- Municipal impact fee development
- Utility financial and rate analyses
- Rate modeling
- Functional population
- Data collection and analysis

Professional History

- Raftelis: Senior Consultant (2025-present); Consultant (2022-2024); Associate Consultant (2019-2021); Intern (2018-2019)

Education

- Bachelor of Science in Statistics - University of Central Florida (2019)

development of a Demonstrated Needs study to justify fee increases under the "extraordinary circumstances" criteria of the Florida Impact Fee Act (F.S. 163.31801). By aligning over \$90 million in growth-related capital needs—such as new substations and expanded park facilities—with a defensible functional population methodology, Raftelis provided the City with a robust framework to ensure that new development pays its proportional share of infrastructure costs.

City of DeLand (FL): Municipal Impact Fee Study

Raftelis has been tasked with various utility rate and impact fee studies over the past several years. In 2025, Raftelis partnered with the City of DeLand (City) to evaluate and update its municipal impact fee program, covering police, fire/EMS, parks and recreation, and general government services. Recently, Raftelis conducted a comprehensive 2025 municipal impact fee study to ensure the City's funding mechanisms remained aligned with the infrastructure demands of a rapidly expanding community.

The study addressed extraordinary circumstances, including a rapid compounded annual population growth rate of 4.0% and significant inflationary pressures on construction materials and labor. Raftelis developed a hybrid methodology to calculate fees that account for both the recoupment of past infrastructure investments and the funding of over \$37 million in future growth-related capital projects, such as the construction of a new \$10.8 million fire station and an \$8.9 million public works fleet building. The study featured a modernization of the City's fee structure, which included refining non-residential land use categories and adjusting residential factors better reflect contemporary housing trends.

Additionally, Raftelis performed a comparative analysis against neighboring jurisdictions to ensure the proposed fees remained competitive while achieving full cost recovery. This effort reinforces a "growth pays for growth" approach, shifting the fiscal responsibility for capacity-expanding infrastructure from existing residents to the new development driving that demand. The 2025 study provides the City with a legally defensible framework to safeguard its long-term operational stability and maintain high levels of service for its citizens.

City of Eustis (FL): Municipal Impact Fee Study

Raftelis partnered with the City of Eustis (City) to evaluate and modernize its municipal impact fee program, encompassing police, fire/EMS, parks and recreation, and library services. Recently, Raftelis conducted a comprehensive 2025 municipal impact fee study to ensure that the City's funding mechanisms remain aligned with the infrastructure demands of a community experiencing a steady 2.3% annual growth rate.

A primary objective of the study was to address extraordinary capital needs resulting from accelerated population growth and significant inflationary pressures on construction. Raftelis developed a hybrid methodology to calculate fees that account for both the recoupment of past investments and the funding of over \$21 million in future growth-related capital projects, including a joint public safety complex, two new fire stations, and a \$2 million library expansion. The study featured a major consolidation of the City's fee structure, reducing forty-three non-residential land-use distinctions down to eight streamlined categories to improve administrative efficiency and better reflect contemporary development trends.

Charlotte Harbor Water Association (FL): Water and Wastewater Rate Study

To support the financial stability and operational continuity of the Charlotte Harbor Water Association (Association), Raftelis developed a comprehensive 2025 revenue sufficiency and cost of service study. The study focused on creating a sustainable funding plan to meet the Association's projected revenue requirements, ensuring compliance with USDA budget covenants and the ability to fund future capital infrastructure projects.

The study modernized the Association’s rate structure through a three-year phased implementation plan designed to distribute the cost of providing service more equitably between customer classes while avoiding rate shock to the users. The proposed design features a monthly base charge calculated to maintain revenue stability and an updated four-tier volumetric pricing formula. These adjustments were specifically engineered to safeguard the Association’s lifeline rate for essential domestic use while increasing the fourth-tier conservation factor to provide a stronger pricing signal for discretionary water use. Additionally, the study introduced a new rate schedule for private fire protection services—aligned with Florida Public Service Commission rules—and restructured general service charges to better reflect equivalent demands by meter size.

Englewood Water District (FL): Utility Rate Study

To support the long-term fiscal health of the Englewood Water District (District), Raftelis developed a comprehensive five-year utility rate study for the District’s water, wastewater, and reclaimed water systems. This study accounted for the combined pressures of persistent inflation and the need to replace aging infrastructure.

The primary goal of the study was to design a multi-year funding strategy to support approximately \$225 million in critical capital improvements including the replacement of an existing water plant and extensive on-going renewal and replacement projects. To meet this funding plan and maintain the District’s strong credit position, Raftelis proposed a series of 15% annual rate adjustments for water, wastewater, and reclaimed water and reviewed and updated the District’s miscellaneous fees.

In addition, Raftelis reviewed and updated the District’s existing capital capacity charges and accrued guaranteed revenue fees to better align these fees with contemporary construction and financing costs. These fees were designed to shift the financial burden of new capacity from existing users to growth-related development.

City of Winter Haven (FL): Utility Rate Studies

Raftelis has partnered with the City of Winter Haven (City) for many years on a variety of strategic financial projects. Recently, Raftelis completed a comprehensive 2024 utility rate study and a 2024 utility connection fee study. These efforts included updating the City’s rate structure, along with rate level adjustments phased in over a multi-year period to provide funding for several significant projects including a major wastewater plant upgrade and expansion. Raftelis worked closely with City staff to develop solutions that meet the utility’s needs while providing just and equitable rates and charges for all customers. Both the utility rates and connection fees were successfully adopted by the City.

Collier County (FL): Water and Wastewater Revenue Sufficiency Study, Connection Fee Study, and Miscellaneous Fee Study

Raftelis has a long-standing partnership with Collier County (County) to provide strategic fiscal analysis and rate-setting guidance for its expansive water, wastewater, and irrigation quality water systems. Raftelis performs frequent revenue sufficiency updates which ensure the County maintains the financial health necessary to support its robust capital requirements. Raftelis also frequency reviews and updates the County’s miscellaneous fees to make sure full costs are being recovered.

Town of Oakland (FL): Utility Revenue Sufficiency and Impact Fee Studies, Municipal Impact Fee Study

Raftelis has worked with the Town of Oakland (Town) for several years on various projects including utility revenue sufficiency studies, impact fee studies, and the implementation of a multi-family rate. The Town is in one of the fastest growing counties in the state, and Raftelis has worked to provide various analyses to help maintain the Town’s infrastructure. Most recently, Raftelis calculated and helped the Town adopt impact fees for police, fire,

parks and recreation, transportation, and water and wastewater. These fees help the Town be able to fund needed expansion-related capital projects.

City of Winter Springs (FL): Water and Wastewater Revenue Sufficiency Study

Raftelis has partnered with the City of Winter Springs (City) to provide comprehensive financial planning and rate-setting services for its utility and stormwater systems.

Recently, Raftelis conducted a comprehensive water and wastewater rate study, the recommendations of which were successfully adopted by the City following the 2023 study. In 2025, Raftelis completed a formal update to this study to verify the utility's financial position and capital requirements. This analysis confirmed that the previously adopted rate path remains sufficient to meet the City's long-term operational and infrastructure needs without further adjustments while the City is finalizing its plans for construction of two new Water Reclamation Facilities.

Bonita Springs Utilities, Inc. (FL): Water and Wastewater Miscellaneous Study

Raftelis has been serving Bonita Springs Utilities, Inc. (BSU) since 2017. Raftelis recently conducted a comprehensive study to update BSU's water and wastewater aid-to-new-construction (ANC) fees using a hybrid method that blends a "buy-in" approach for existing capacity with an improvements-driven approach for planned expansions. Raftelis also provided a bottom-up cost analysis of over twenty of BSU's miscellaneous service fees including meter installations, backflow inspections, and high-strength surcharges to reflect current labor material, and vehicle costs. Additionally, Raftelis helped establish a new, equitable utility rate classification for mobile home and RV customers based on a consumption evaluation.

City of Lake Alfred (FL): Water and Wastewater Revenue Sufficiency Study, Water and Wastewater Connection Fee Study, and Municipal Impact Fee Study

Michelle has served as a consultant for the City of Lake Alfred (City) on various projects including a revenue sufficiency study, and update to the existing water and wastewater connection fees, and an update to the municipal impact fees. She developed models to review growth projections, level of service standards, and existing and proposed capital facilities to develop water and wastewater connection fees and police, fire, recreation, and general government.

City of Auburndale (FL): Water and Wastewater Revenue Sufficiency Study, Water and Wastewater Connection Fees Study

Michelle served as an associate consultant for the City of Auburndale (City) on a project to provide a water and wastewater revenue sufficiency study and update existing water and wastewater connection fees. She developed a model that forecasted rate revenues, operating expenses, capital projects, wholesale purchases, and debt to project revenue requirements and assisted in providing rate recommendations.

City of Cocoa Beach (FL): Stormwater Revenue Sufficiency Study

Michelle was a consultant for the City of Cocoa Beach (City) on a study to perform a revenue sufficiency analysis on the City's stormwater system. She developed a model to forecast fiscal requirements, CIP funding, customer account growth, and debt service to develop rate recommendations.

City of Tavares (FL): Water and Wastewater Revenue Sufficiency Study

Michelle served as an associate consultant on a project with the City of Tavares (City) to provide a water and wastewater revenue sufficiency study. Michelle analyzed customer statistics, debt agreements, and capital improvement programs to forecast a projection of the City's utility operations.

Tim Du

STAFF CONSULTANT
Associate Consultant

ROLE

Tim will work at the direction of Shawn and Michelle in conducting analyses and preparing deliverables for the project.

PROFILE

Tim currently serves as an Associate Consultant in Raftelis' Maitland, FL office. His primary expertise includes municipal impact fee development and utility revenue sufficiency analysis.

RELEVANT PROFESSIONAL EXPERIENCE

City of Haines City: Water and Wastewater Connection Fee Study

Recently, Raftelis completed a comprehensive 2026 Utility Capacity Charge Study. This study involved a detailed review of the Haines City's water and wastewater assets and its capital improvement program to ensure that capacity charges accurately reflect the current cost of providing infrastructure. The analysis utilized a hybrid methodology, blending a "buy-in" approach for existing system capacity with an improvements-driven approach for planned expansions. This effort resulted in updated capacity charges for residential and commercial connections, aligning the City's "growth pays for growth" policy with recent inflationary impacts and infrastructure needs.

City of Deltona: Police, Fire Rescue, Recreation, and Administrative / Public Works Impact Fee Study

Raftelis has been tasked with various impact fee studies over the past several years. In 2025, Raftelis partnered with the City of Deltona (City) to evaluate and update its municipal impact fee program, covering police, fire/EMS, parks and recreation, and general government services. The study featured a modernization of the City's fee structure, which included refining non-residential land use categories and adjusting residential factors better reflect contemporary housing trends.

Additionally, Raftelis performed a comparative analysis against neighboring jurisdictions to ensure the proposed fees remained competitive while achieving full cost recovery. This effort reinforces a "growth pays for growth" approach, shifting the fiscal responsibility for capacity-expanding infrastructure from existing residents to the new development driving that demand. The 2025 study provides the City with a legally defensible framework to safeguard its long-term operational stability and maintain high levels of service for its citizens.

City of Lake Wales (FL): Utility Connection Fee Study, Municipal Impact Fee Study

Raftelis has partnered with the City of Lake Wales (City) for several years to provide strategic financial planning and rate-setting services, with a primary focus on ensuring the long-term revenue sufficiency of its utility systems.

This engagement centers on conducting comprehensive utility connection fee study for the City's water and wastewater systems. These efforts involve updating fees to account for population growth and significant expansionary pressures on utility system capacity. Raftelis works closely with City staff to evaluate multi-year capital funding requirements and develop connection fees that ensure the utility remains on a sound financial footing while maintaining high levels of service for both existing and future customers.



Specialties

- Impact Fee Studies (utility & municipal)
- Utility cost-of-service & rate structure studies
- Revenue sufficiency analysis

Professional History

- Raftelis: Associate Consultant (2025-present); Analyst (2025)
- Bank of America: Corporate Audit Analyst (2024)

Education

- Bachelor of Arts in Economics and Statistics - University of Notre Dame (2025)

Complementing the utility connection fee study, Raftelis also completed a 2025 Municipal Impact Fee Study for police, fire, parks and recreation, and library services. A critical component of this work was the development of a Demonstrated Needs study to justify fee increases under the "extraordinary circumstances" criteria of the Florida Impact Fee Act (F.S. 163.31801). By aligning growth-related capital needs—such as new substations and expanded park facilities—with a defensible functional population methodology, Raftelis provided the City with a robust framework to ensure that new development pays its proportional share of infrastructure costs.

City of St. Pete Beach (FL): Utility Rate and Connection Fee Study

Building upon years of collaborative success, Raftelis recently finalized a holistic 2026 utility rate and connection fee study for the City of St. Pete Beach. This project centered on aligning the City's revenue structures with its evolving operational and capital needs, ensuring the fiscal solvency of the utility funds for years to come. The study resulted in a strategic implementation plan featuring phased rate level adjustments that provide essential funding for high-priority infrastructure investments while prioritizing community affordability. Through a series of workshops and technical analyses, Raftelis developed tailored financial solutions that uphold the principles of equity, ensuring that the cost of service is shared fairly across the City's diverse customer base.

Tristen Townsend

STAFF CONSULTANT Consultant

ROLE

Tristen will work at the direction of Shawn and Michelle in conducting analyses and preparing deliverables for the project.

PROFILE

While at Raftelis, Tristen has worked on projects involving water, wastewater, and stormwater enterprise systems, municipal impact fee development, and building fees. These projects have focused on the evaluation of financial position and involved developing revenue and expense projections, analyzing customer data, and developing client specific financial models. Tristen earned her master's degree from Duke University in Environmental Management and has bachelor's degrees in Environmental Science and Mathematics from the University of Florida. During graduate school, she served as a student consultant for the North Carolina Department of Environmental Quality and interned at DC Water.

KEY PROJECT EXPERIENCE

City of Dania Beach (FL): Stormwater Rate Study

Tristen served as the lead analyst for a stormwater rate study with the City of Dania Beach (City). She developed a 10-year revenue sufficiency to assess the financial sustainability of the stormwater enterprise fund. Tristen worked with City staff to review data and assumptions and created a financial forecast which included detailed budget projections, capital improvement funding, and projection of revenue generation. To help address ongoing concerns related to equitable fee implementation, she performed detailed review and analysis of the City's customer data to assess potential rate structure changes. Tristen assisted with preparation of presentation materials and co-presented study findings and recommendations at a City Commission meeting.

City of Bartow (FL): General Fund Sustainability Study, Municipal Impact Fee Study

Tristen served as the lead analyst for a general fund sustainability study and municipal impact fees study with the City of Bartow (City). She supported the development of a 10-year revenue sufficiency model to assess the financial sustainability of the City's general fund. Tristen worked with City staff to review data and assumptions and created a financial forecast which included detailed budget projections and capital improvement funding and explored numerous scenarios to assess sensitivity to growth and cost increases. Tristen is also currently serving as the lead analyst for a municipal impact fee study with the City, in which she developed a functional population model to calculate impact fee equivalencies based on different types of expected future development and utilized this in the development and calculation of police, fire, parks and recreation, and public facilities impact fees.



Specialties

- Water, wastewater, and stormwater rates and fees
- Impact fee development (utility & municipal)
- Financial modeling and forecasting
- Data analysis and visualization

Professional History

- Raftelis: Consultant (2024-present); Associate Consultant (2022-2023)
- Florida Department of Health – Hillsborough County: Environmental Specialist II (2021-2022)
- North Carolina Department of Environmental Quality: Student Consultant (2019-2020)
- DC Water: Performance Intern (2019)
- Nicholas School of the Environment – Research Assistant (2018-2019)
- City of Lakeland Water Utilities – Intern (2018)

Education

- Master of Environmental Management in Water Resources Management – Nicholas School of the Environment, Duke University (2020)
- Bachelor of Science in Environmental Science – University of Florida (2017)
- Bachelor of Arts in Mathematics – University of Florida (2017)

City of Dunedin (FL): Stormwater Rate Study, Marina Rate Study

Tristen served as the lead analyst for a stormwater rate study and a marina rate study for the City of Dunedin (City). For the stormwater rate study, she assisted with development of a 10-year dynamic model to inform fiscally sustainable rates, which included detailed budget projections, capital improvement funding, and projection of revenue generation and reserve balances. She also supported the preparation of detailed presentation materials for meetings with the Finance Commission, Stormwater Advisory Committee, and City Commission. For the marina rate study, Tristen helped develop a 10-year revenue sufficiency to assess the financial sustainability of the marina enterprise fund. Tristen worked with City staff to review data and assumptions and created a financial forecast which included detailed budget projections, capital improvement funding, projection of revenue generation, and a pay-go cash target. She supported rate design analysis for the marina based on common methodologies in the industry and used Qualtrics to perform a benchmarking survey of marinas in the local region to inform operations. Tristen helped create detailed presentations for the Marina Advisory Committee, Finance Committee, and City Commission and presented study findings and recommendations at a City Commission workshop.

City of Fort Walton Beach (FL): Sanitation Revenue Sufficiency Study

Tristen served as the lead analyst to provide a financial forecast for the City of Fort Walton Beach's sanitation enterprise fund. She assisted with model development, which included updating highly detailed budget projections, capital improvement funding, and projection of revenue generation and reserve balances, as well as an analysis to better align pass-through costs for tipping fees with individual cost components within the existing fee structure.

City of Kissimmee (FL): Municipal Impact Fee Study

Tristen served as the lead analyst on a project with the City of Kissimmee (City) to calculate municipal impact fees. Prior to this study, the City did not charge impact fees for police or fire services. Tristen developed a functional population model to calculate impact fee equivalencies based on different types of expected future development and utilized this in the calculation of police, fire, and parks and recreation impact fees.

City of Marathon (FL): Wastewater Rate Study

Tristen served as the lead analyst to provide a financial forecast for the wastewater and stormwater utilities with the City of Marathon (City). Tristen assisted with the model development, which included highly detailed budget projections due to operating contracts and evolving customer characteristics in addition to revenue generation, reserve balances, and capital improvement funding.

City of Ocoee (FL): Water and Wastewater Rate Study

Tristen served as the lead analyst to provide a financial forecast for the City of Ocoee's water and wastewater utilities. She assisted with the model development, which included updating highly detailed budget projections, capital improvement funding, and projection of revenue generation and reserve balances.

City of Port Orange (FL): Municipal Impact Fee Study

Tristen served as the lead analyst on a project with the City of Port Orange (City). The City hired Raftelis to perform a financial update for the City's impact fees, including services of water and wastewater as well as police, fire, transportation, and parks and recreation. Prior to this study, the City did not charge impact fees for police services. Tristen developed a functional population model to calculate impact fee equivalencies based on different types of expected future development and utilized this in the calculation of police, fire, and parks and recreation impact fees.

City of Bunnell (FL): Water and Wastewater Rate Study

Tristen served as the lead analyst to provide a financial forecast for the City of Bunnell's water and wastewater utilities. She assisted with the model development, which included updating highly detailed budget projections, capital improvement funding, and projection of revenue generation and reserve balances.

City of Denison (TX): Transportation Impact Fee Study

The City of Denison (City) retained Raftelis to establish new impact fees for water, wastewater, and transportation facilities in an effort to provide adequate funding for the City's infrastructure investments required to accommodate growth and provide the appropriate level of service. Tristen was the lead analyst for development of the transportation impact fees and helped create a 10-year model with detailed forecasts supporting demand requirements, as well as the capacity provided by the future investments to serve this new development. The Texas state statute identifies several constraints and limitations on calculating impact fees, which were navigated by the project team to provide the necessary road improvements.

PROJECT LIST (*ONGOING)

- City of Alachua (FL) – Industrial pre-treatment program study*
- City of Bartow (FL) – General fund study; municipal impact fee study
- City of Bunnell (FL) – Water and wastewater rate study
- City of Dania Beach (FL) – Stormwater rate study
- City of Denison (TX) – Transportation impact fee study
- City of Dunedin (FL) – Marina rate study; Stormwater rate study, Water and wastewater rate study
- City of Eustis (FL) – Water, wastewater, and reclaimed water rate study*
- City of Flagler Beach (FL) – Water and wastewater rate study
- Florida Keys Aqueduct Authority (FKAA) (FL) – Navy water rate contract study
- City of Fort Walton Beach (FL) – Solid waste rate study; Water and wastewater rate study*
- Hillsborough County (FL) – Stormwater rate study*
- Town of Jupiter Island/South Martin Regional Utility (FL) – Water rate price index study
- Key Largo Wastewater Treatment District (FL) – Wastewater rate study
- City of Kissimmee (FL) – Municipal impact fee study
- City of Marathon (FL) – Building fee study; Wastewater rate study; Municipal impact fee study*
- City of Mascotte (FL) – Utility impact fee study*
- New Smyrna Beach Utilities (FL) – Utility rate, impact, and miscellaneous fee study*
- City of Ocoee (FL) – Water, wastewater, and reclaimed water rate study
- City of Palm Coast (FL) – Utility strategic plan
- City of Pompano Beach (FL) – Undergrounding fee-in-lieu study
- City of Port Orange (FL) – Municipal impact fee study
- City of Port St. Lucie (FL) – Stormwater rebate study
- Regional Utilities (FL) – Bond feasibility study*
- South Walton Utility Company, Inc. (FL) – Water and wastewater rate study
- City of St. Cloud (FL) – Stormwater rate study; Building fee study*; Marina rate study*
- St. Lucie County (FL) – Water and wastewater rate and connection fee study
- City of Tampa (FL) – Building fee study*
- Village of Wellington (FL) – Building fee study
- City of Wilton Manors (FL) – Water and wastewater rate study*
- City of Winter Haven (FL) – Municipal impact fee study; Building fee study*
- City of Winter Park (FL) – Water and Wastewater Utilities strategic plan

RELEVANT PROFESSIONAL EXPERIENCE

Florida Department of Health – Hillsborough County: Environmental Specialist II (2021-2022)

The Florida Department of Health – Hillsborough County is the primacy agency for implementation of the Safe Drinking Water Act in Hillsborough County. Tristen worked as an Environmental Specialist II in the Safe Drinking Water Program. She was responsible for performing sanitary surveys, complaint investigations, and compliance inspections for public water systems and identifying corrective actions to ensure system compliance. Tristen evaluated applications for well sitings and plant modification permit clearances and oversaw the Consumer Confidence Report (CCR) program, reviewing CCRs for accuracy, providing guidance for mandated reports, and tracking system compliance. Her work also included creating and maintaining internal databases used for advanced merge letters, public notices, and inspection forms by Safe Drinking Water staff.

North Carolina Department of Environmental Quality: Student Consultant (2019-2020)

The North Carolina Department of Environmental Quality is responsible for developing water quality standards, rules, and management strategies. Tristen was on a team of students tasked with analyzing ambient water quality monitoring data to provide recommendations for nutrient criteria and harmful algal bloom management strategies for lakes and reservoirs in North Carolina. Her work included the development of hierarchical models and multivariate analysis to assess temporal trends and identify relationships between phytoplankton communities and water quality parameters.

DC Water: Performance Intern (2019)

DC Water is a drinking water and wastewater utility serving over 700,000 residents and 21 million annual visitors in the District of Columbia. Tristen worked under the Director of Sustainability and Watershed Management. Her primary role was synthesizing data to inform development of an enterprise-wide sustainability strategy. Tristen's work included performing discourse and freelisting analyses to identify shared sustainability priorities among staff. She also drafted abstracts, papers, and presentations for scientific and management conferences related to water affordability, integrated planning, and sustainability.

Nicholas School of the Environment: Research Assistant (2018-2019)

Tristen was a research assistant at the Nicholas Institute of Environmental Policy through the Nicholas School of the Environment. She performed literature reviews of existing water infrastructure finance mechanisms and compiled relevant case studies of water systems to assess how various system characteristics may allow for more innovative finance mechanisms to be used.

City of Lakeland Water Utilities: Intern (2018)

City of Lakeland Water Utilities is a municipal water and sewer utility serving the residents of Lakeland, Florida. Tristen worked at a constructed wetland treatment park called Se7en Wetlands which provides tertiary treatment for all the City's wastewater. She designed multiple interpretive signs for the park to educate visitors about the local watershed, how treatment wetlands improve water quality, and native plant and animal species. Additionally, Tristen assisted with developing a new volunteer program by writing volunteer job descriptions, as well as creating educational outreach materials for students.

PRESENTATIONS

- “How Sustainability and ESG Intersect and Differ”, WEF/AWWA Utility Management Conference, 2023 (Co-presenter)

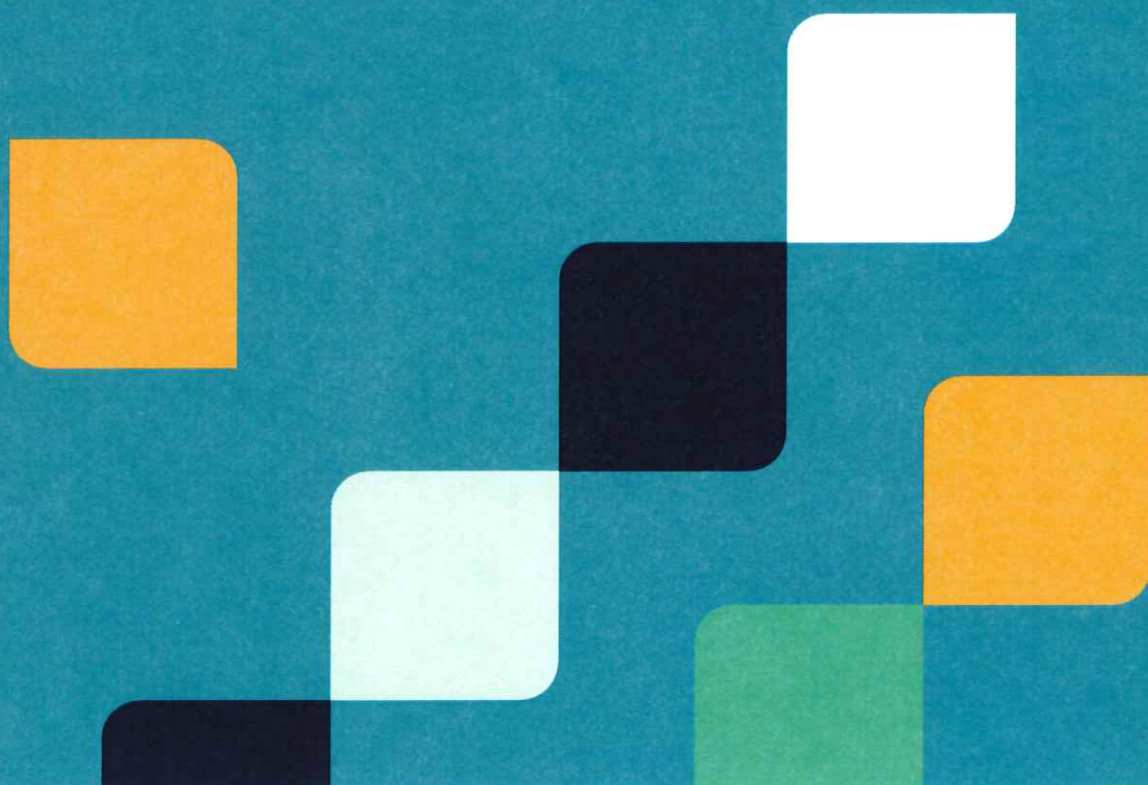
PUBLICATIONS

- “Sustainability at DC Water: Concept Development, Input, and Reporting”, WEF/AWWA Utility Management Conference, 2020 (Co-Author)
- “Water Challenges in Smart Cities”, Dentons Global Smart Cities & Communities Think Tank, 2019 (Co-Author)

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APPENDIX B: REQUIRED FORMS & DOCUMENTS

Appendix B: Required Forms & Documents



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Last updated by David George on May 30, 2025 at 09:22 AM

RAFTELIS FINANCIAL CONSULTANTS INC



RAFTELIS FINANCIAL CONSULTANTS INC

Unique Entity ID KNBJQ774GH17	CAGE / NCAGE 3DNA1	Purpose of Registration All Awards
Registration Status Active Registration	Expiration Date May 30, 2026	
Physical Address 227 W Trade ST STE 1400 Charlotte, North Carolina 28202-1632 United States	Mailing Address 227 West Trade Street Suite 1400 Charlotte, North Carolina 28202 United States	

Business Information

Doing Business as RAFTELLS	Division Name (blank)	Division Number (blank)
Congressional District North Carolina 12	State / Country of Incorporation North Carolina / United States	URL (blank)

Registration Dates

Activation Date Jun 3, 2025	Submission Date May 30, 2025	Initial Registration Date Feb 13, 2003
---------------------------------------	--	--

Entity Dates

Entity Start Date May 10, 1993	Fiscal Year End Close Date Dec 31
--	---

Immediate Owner

CAGE (blank)	Legal Business Name (blank)
------------------------	---------------------------------------

Highest Level Owner

CAGE (blank)	Legal Business Name (blank)
------------------------	---------------------------------------

Executive Compensation

In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) receive both of the following: 1. 80 percent or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements and 2. \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?

No

Does the public have access to information about the compensation of the senior executives in your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?

Not Selected

Proceedings Questions

Is your business or organization, as represented by the Unique Entity ID on this entity registration, responding to a Federal procurement opportunity that contains the provision at FAR 52.209-7, subject to the clause in FAR 52.209-9 in a current Federal contract, or applying for a Federal grant opportunity which contains the award term and condition described in 2 C.F.R. 200 Appendix XII?

No

Does your business or organization, as represented by the Unique Entity ID on this specific SAM record, have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than \$10,000,000?

Not Selected

Within the last five years, had the business or organization (represented by the Unique Entity ID on this specific SAM record) and/or any of its principals, in connection with the award to or performance by the business or organization of a Federal contract or grant, been the subject of a Federal or State (1) criminal proceeding resulting in a conviction or other acknowledgment of fault; (2) civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than \$5,000, or other acknowledgment of fault; and/or (3) administrative proceeding resulting in a finding of fault with either a monetary fine or penalty greater than \$5,000 or reimbursement, restitution, or damages greater than \$100,000, or other acknowledgment of fault?

Not Selected

Last updated by David George on May 30, 2025 at 09:22 AM

RAFTELIS FINANCIAL CONSULTANTS INC

Exclusion Summary

Active Exclusions Records?

N

SAM Search Authorization

I authorize my entity's non-sensitive information to be displayed in SAM public search results:

Yes

Entity Types

Business Types

Entity Structure	Entity Type	Organization Factors
Corporate Entity (Not Tax Exempt)	Business or Organization	Subchapter S Corporation
Profit Structure		
For Profit Organization		

Socio-Economic Types

Check the registrant's Repts & Certs, if present, under FAR 52.212-3 or FAR 52.219-1 to determine if the entity is an SBA-certified HUBZone small business concern. Additional small business information may be found in the SBA's Dynamic Small Business Search if the entity completed the SBA supplemental pages during registration.

Financial Information

Accepts Credit Card Payments	Debt Subject To Offset
No	No

EFT Indicator	CAGE Code
0000	3DNA1

Electronic Funds Transfer

Account Type	Routing Number	Lock Box Number
Checking	*****00	(blank)
Financial Institution	Account Number	
FIRST CITIZENS BANK & TRUST COMPANY	*****71	

Automated Clearing House

Phone (U.S.)	Email	Phone (non-U.S.)
7043384122	jjasso@raftelis.com	(blank)
Fax		
(blank)		

Remittance Address

Jessica Jasso
 227 W. Trade ST.
 Suite 1400
 Charlotte, North Carolina 28202
 United States

Taxpayer Information

EIN	Type of Tax	Taxpayer Name
****4069	Applicable Federal Tax	RAFTELIS FINANCIAL CONSULTANTS INC
Tax Year (Most Recent Tax Year)	Name/Title of Individual Executing Consent	TIN Consent Date
2024	Chief Financial Officer	May 30, 2025
Address	Signature	
227 West Trade Street Charlotte, North Carolina 28202	Christine McIntyre	

Points of Contact

Accounts Receivable POC

Jessica Jasso, Accounting Manager

Apr 27, 2026 04:01:20 PM GMT
<https://sam.gov/entity/KNB/Q774GH17/coreData?status=null>

Last updated by David George on May 30, 2025 at 09:22 AM

RAFTELIS FINANCIAL CONSULTANTS INC

jjasso@raftells.com
7042473227

Electronic Business

ⓧ David George, Marketing Director dgeorge@raftells.com 7049108965	227 West Trade Street Suite 1400 Charlotte, North Carolina 28202 United States
PEIFFER BRANDT pbrandt@raftells.com 7043731199	227 W. Trade Street Suite 1400 Charlotte, North Carolina 28202 United States

Government Business

ⓧ David George, Marketing Director dgeorge@raftells.com 7049108965	227 West Trade Street Suite 1400 Charlotte, North Carolina 28202 United States
PEIFFER BRANDT pbrandt@raftells.com 7043731199	227 W. Trade Street Suite 1400 Charlotte, North Carolina 28202 United States

Service Classifications

NAICS Codes

Primary	NAICS Codes	NAICS Title
Yes	541618	Other Management Consulting Services
	541330	Engineering Services
	541611	Administrative Management And General Management Consulting Services
	541620	Environmental Consulting Services

Product and Service Codes

PSC	PSC Name
R499	Support- Professional: Other

Size Metrics

IGT Size Metrics

Annual Revenue (from all IGTs)
(blank)

Worldwide

Annual Receipts (in accordance with 13 CFR 121) \$45,745,072.00	Number of Employees (in accordance with 13 CFR 121) 205
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Location

Annual Receipts (in accordance with 13 CFR 121) (blank)	Number of Employees (in accordance with 13 CFR 121) (blank)
--	--

Industry-Specific

Barrels Capacity (blank)	Megawatt Hours (blank)	Total Assets (blank)
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Electronic Data Interchange (EDI) Information

This entity did not enter the EDI information

Disaster Response

This entity does not appear in the disaster response registry.



NORTH CAROLINA

Department of the Secretary of State

CERTIFICATE OF EXISTENCE

I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify that

RAFTELIS FINANCIAL CONSULTANTS, INC.

is a corporation duly incorporated under the laws of the State of North Carolina, having been incorporated on the 23rd day of April, 2004, with its period of duration being Perpetual.

I FURTHER certify that, as of the date set forth hereunder, the said corporation's articles of incorporation are not suspended for failure to comply with the Revenue Act of the State of North Carolina; that the said corporation is not administratively dissolved for failure to comply with the provisions of the North Carolina Business Corporation Act; that its most recent annual report required by N.C.G.S. 55-16-22 has been delivered to the Secretary of State; and that the said corporation has not filed articles of dissolution as of the date of this certificate.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 18th day of March, 2026.

Elaine F. Marshall

Secretary of State

Certification# 126933926-1 Reference# 24095451- Page: 1 of 1
 Verify this certificate online at <https://www.sosnc.gov/verification>

State of Florida Department of State

I certify from the records of this office that RAFTELIS FINANCIAL CONSULTANTS, INC. is a North Carolina corporation authorized to transact business in the State of Florida, qualified on February 10, 2005.

The document number of this corporation is F05000000923.

I further certify that said corporation has paid all fees due this office through December 31, 2026, that its most recent annual report/uniform business report was filed on January 14, 2026, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Third day of February, 2026*



Secretary of State

Tracking Number: 8920254666CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

EXHIBIT "A"
CONTACT SHEET

Name: Raftelis Financial Consultants, Inc. (DBA Raftelis)
 Federal Taxpayer ID: 20-1054069
 Mailing Address: 341 N. Maitland Avenue, Suite 300
 City, State, & Zip Code: Maitland, FL 32751
 Telephone: 407-628-2600 Fax: 828-484-2442
 Email: socasio@raftelis.com
 Submitted By: Shawn Ocasio *Shawn Ocasio*
 Title: Senior Manager/Point of Contact

Accounting Contact:
 Name: Jessica Jasso Title: Accounting Manager
 Email Address: jjasso@raftelis.com Phone: 704-373-1199

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

EXHIBIT "B"

SWORN STATEMENT UNDER F.S. SECTION 287.133(3) (A), ON PUBLIC ENTITY CRIMES

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

1. This sworn statement is submitted with Bid, Proposal or Contract for Impact Fees Study.
2. This sworn statement is submitted by (entity) Raftelis Financial Consultants, Inc. whose business address is 227 W. Trade St., Suite 1400 Charlotte, NC 28202 and (if applicable) Federal Employer Identification Number (FEIN) is 20-1054069 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)
3. My name is Elaine Conti and my relationship to the entity named above is Chief Administrative Officer
4. I understand that a "public entity crime" as defined in Paragraph 287.133(a) (g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or any agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in paragraph 287.133(a) (b), Florida Statutes, means finding of guilt or a conviction of a public entity crime with or without an adjudication of guilt, in any federal or state trial court of records relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:
 1. A predecessor or successor of a person convicted of a public entity crime; or
 2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The City of Neptune Beach, Florida ownership by one of shares constituting a controlling income among persons when not for fair interest in another person, or a pooling of equipment or income among persons when not for fair market value under a length agreement, shall be a prima facie case that one person controls another person. A person who was knowingly convicted of a public entity crime, in Florida during the preceding 36 months shall be considered an affiliate.
7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of the state or of the United States with the legal power to enter into a binding contract for provision of goods or services let by a public entity, or which

CITY OF NEPTUNE BEACH
REQUEST FOR PROPOSAL
RFP 26-01 IMPACT FEES STUDY

otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies)

Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. (Please attach a copy of the final order.)

The person or affiliate was placed on the convicted list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in public interest to remove the person or affiliate from the convicted list. (Please attach a copy of the final order.)

The person or affiliate has not been placed on the convicted list. (Please describe any action taken by, or pending with, the Department of General Services.)

[Handwritten Signature]

April 27, 2026

Signature

Date:

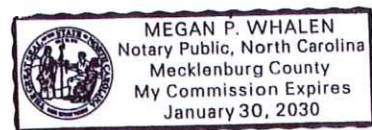
STATE OF NORTH CAROLINA
COUNTY OF Mecklenburg

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 27th day of April, 2026 and is personally known to me, or has provided N/A as identification.

[Handwritten Signature: Megan P. Whalen]

Notary Public

My Commission expires: 1/30/2030



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF NEPTUNE BEACH
 REQUEST FOR PROPOSAL
 RFP 26-01 IMPACT FEES STUDY

EXHIBIT "C"
DRUG-FREE WORKPLACE CERTIFICATION

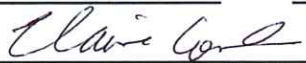
The below-signed INDIVIDUAL certifies that it has implemented a drug-free workplace program. In order to have a drug-free workplace prepare, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or services a copy of the statement specified in paragraph 1.
4. In the statement in paragraph 1., notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of nolo contendere to, any violation occurring in the workplace no later than five (5) working days after such conviction.
5. Impose a sanction on, or require fine satisfactory participation in drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign this statement, I Certify that this individual complies fully with the above drug-free workplace requirements.

COMPANY: Raftelis Financial Consultants, Inc. (DBA Raftelis)

CITY: Charlotte STATE: NC ZIP CODE: 28202

SIGNATURE:  PHONE: 704-373-1199

NAME (TYPED OR PRINTED): Elaine Conti TITLE: Chief Administrative Officer

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF NEPTUNE BEACH
REQUEST FOR PROPOSAL
RFP 26-01 IMPACT FEES STUDY

EXHIBIT "D"
E-VERIFY STATEMENT

Bid/Proposal Number: RFP #2026-01

Project Description: Impact Fees Study

I acknowledge and agrees to the following:

I shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

1. All persons employed by the INDIVIDUAL during the term of the Contract to perform employment duties within Florida; and
2. All persons assigned by the INDIVIDUAL to perform work pursuant to the contract with the Department.

Individual/Company/Firm: Raftelis Financial Consultants, Inc.

Authorized Signature: 

Title: Chief Administrative Officer

Date: April 27, 2026

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF NEPTUNE BEACH
REQUEST FOR PROPOSAL
RFP 26-01 IMPACT FEES STUDY

EXHIBIT "E"

PROPOSER ACKNOWLEDGEMENTS AND AGREEMENTS

The undersigned, as an employee or agent of the Proposer, having the authority to sign a binding agreement on behalf of the corporation, company, or individual presenting this submittal, confirms understanding and/or agreement and/or takes exception with any statement in the following sections of this ITB/RFP document.

- 1. INTRODUCTION AND GENERAL INFORMATION
Understands and agrees to all terms.
- 2. PROPOSAL INSTRUCTIONS, TERMS AND CONDITIONS
Understands and agrees to all terms.
- 3. EVALUATION AND CONTRACT OVERVIEW
Understands and agrees to all terms.
- 4. PROPOSER'S RESPONSE: SUBMITTAL INFORMATION
Understands and agrees to all terms.
- 5. PROPOSER'S RESPONSE: PROPOSED TEAM
Understands and agrees to all terms.
- 6. PROPOSER'S RESPONSE: PROPOSED COMPENSATION
Understands and agrees to all terms.

Name: Elaine Conti Title: Chief Administrative Officer

Signature:  Date: April 27, 2026

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF NEPTUNE BEACH
REQUEST FOR PROPOSAL
RFP 26-01 IMPACT FEES STUDY

EXHIBIT "F"

CONFLICT OF INTEREST STATEMENT

This sworn statement is submitted with Bid, Proposal or Contract for Impact Fees Study

This sworn statement is submitted by (entity) Raftelis Financial Consultants, Inc. whose business address is 227 W. Trade St., Suite 1400 Charlotte, NC 28202 and (if applicable) Federal Employer Identification Number (FEIN) is 20-1054069 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is Elaine Conti and my relationship to the entity named above is Chief Administrative Officer

1. The above-named entity is submitting a Proposal for the City of Neptune Beach.
2. The Affiant has made diligent inquiry and provides the information contained in the Affidavit based upon his/her own knowledge.
3. The Affiant states that only one submittal for the above proposal is being submitted and that the above-named entity has no financial interest in other entities submitting proposals for the same project.
4. Neither the Affiant nor the above-named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraints of free competitive pricing in connection with the entity's submittal for the above proposal. This statement restricts the discussion of pricing data until the completion of negotiations if necessary and execution of the Contract for this project.
5. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended or otherwise ineligible from participation in contract letting by any local, State, or Federal Agency.
6. Neither the entity nor its affiliates, nor anyone associated with them have any potential conflict of interest due to any other clients, contracts, or property interests for this project.
7. I certify that no member of the entity's ownership or management is presently applying for an employee position or actively seeking an elected position with the City of Neptune Beach.
8. I certify that no member of the entity's ownership or management, or staff has a vested interest in any aspect of the City of Neptune Beach.
9. In the event that a conflict of interest is identified in the provision of services, I, on behalf of the above-named entity, will immediately notify the City of Neptune Beach.

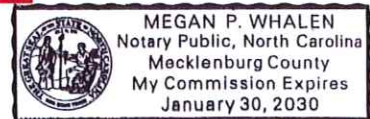
Elaine Conti April 27, 2026
Signature Date

STATE OF NORTH CAROLINA
COUNTY OF Mecklenburg

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 27th day of April, 2026 and is personally known to me, or has provided N/A as identification.

Megan P. Whalen My Commission expires: 1/30/2030
Notary Signature

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL



CITY OF NEPTUNE BEACH
REQUEST FOR PROPOSAL
RFP 26-01 IMPACT FEES STUDY

EXHIBIT "G"

NON-COLLUSION AFFIDAVIT

This sworn statement is submitted with Bid, Proposal or Contract for Impact Fees Study

This sworn statement is submitted by (entity) Raftelis Financial Consultants, Inc. whose business address is 227 W. Trade St., Suite 1400 Charlotte, NC 28202 and (if applicable) Federal Employer Identification Number (FEIN) is 20-1054069 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is Elaine Conti and my relationship to the entity named above is Chief Administrative Officer

1. The above named is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal;
2. Such Proposal is genuine and is not a collusive or sham proposal;
3. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, connived, or agreed, directly or indirectly, with any other Bidder, firm or person to submit a collusive or sham Proposal in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm, or person to fix the price or prices in the attached proposal or any other Bidder, or to fix any overhead, profit or cost element of the proposal price or the proposal price of any other Bidder, or to secure through any collusion, connivance, or unlawful agreement any advantage against the City of Neptune Beach, Florida or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Elaine Conti April 27, 2026
Signature Date:

STATE OF NORTH CAROLINA
COUNTY OF Mecklenburg

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 27th day of April, 2020 and is personally known to me, or has provided N/A as identification.

Megan P. Whalen My Commission expires: 1/30/2030
Notary Signature



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF NEPTUNE BEACH
REQUEST FOR PROPOSAL
RFP 26-01 IMPACT FEES STUDY

EXHIBIT "H"
DISPUTES DISCLOSURE FORM

Answer the following questions by placing an "X" after "YES" or "NO". If you answer "YES", please explain in the space provided, or via attachment.

Has your firm or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulations or any other regulatory agency or professional association within the last five (5) years?

YES _____ NO _____

Has your firm, or any member of your firm, been declared in default, terminated or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?


YES _____ NO _____

Has your firm had against it or filed any request for equitable adjustment, contract claims, bid protest, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?

YES * NO _____

If yes, state the nature of the request for equitable adjustment, contract claim, litigation, or protest, and state a brief description of the case, the outcome or status of the suit and the monetary amounts or extended contract time involved.

I hereby certify that all statements made are true and agree and understand that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this proposal for the City of Neptune Beach.

<u>Raftelis Financial Consultants, Inc.</u>	<u>April 27, 2026</u>
Firm	Date
	Elaine Conti - Chief Administrative Officer
Authorized Signature	Printed or Typed Name and Title

*Raftelis has been joined as a third-party defendant in a lawsuit filed by local developers against the Town of Fuquay-Varina, North Carolina. The subject of this currently pending litigation is development impact fees assessed by the town and developed by Raftelis. This is the only legal case in which Raftelis has been joined as a party in the history of our firm. Raftelis intends to vigorously defend the allegations and claim.

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

City of Neptune Beach

Bid No. 2026-01

Impact Fee Study – RFP Score Sheet

Bid Reviewer Name: *Colin Moore*

Bidder Name:	Bid Amount	Quality of Firm and Experience 0-25 points	Qualifications of Staff 0-15 points	Project Approach 0-25 points	History of documented customer satisfaction with similar uses 0-15 points	Project Cost 0-20 points	Total Points
Arcadis	\$125,000.00	21	12	18	12	15	78
DTA	\$82,555.00	16	12	19	14	18	79
FCS, A Bowman company	\$88,000.00	16	11	16	11	17	71
NUE Urban Concepts	\$324,875.00	16	11	15	10	5	57
Raftelis	\$120,000.00	22	14	21	15	16	88
Stantec	\$79,025.00	22	13	19	13	18	85
A copy of the unofficial handwritten bid/proposal tabulation provided at the bid opening is subject to final verification by staff							

* The City of Neptune Beach reserves the right to accept any bid or response, reject any or all bids or responses, to waive informalities and make the award or any portion thereof that, in the City's sole and absolute judgement, will be in the best interest of the City in any manner thereof.

Staff present were:
 Heather Whitmore, Community Development Director
 Catherine Ponson, City Clerk

**City of Neptune Beach
 Bid No. 2026-01
 Impact Fee Study – RFP Score Sheet**

Bid Reviewer Name:

D. Calhoun

Bidder Name:	Bid Amount	Quality of Firm and Experience 0-25 points	Qualifications of Staff 0-15 points	Project Approach 0-25 points	History of documented customer satisfaction with similar uses 0-15 points	Project Cost 0-20 points	Total Points
Arcadis	\$125,000.00	24	13	22	11	16	86
DTA	\$82,555.00	25	14	23	12	19	93
FCS, A Bowman company	\$88,000.00	25	13	24	13	18	93
NUE Urban Concepts	\$324,875.00			Not responsive			
Raftelis	\$120,000.00	25	15	25	15	17	97
Stantec	\$79,025.00	25	13	22	14	20	94
A copy of the unofficial handwritten bid/proposal tabulation provided at the bid opening is subject to final verification by staff							

* The City of Neptune Beach reserves the right to accept any bid or response, reject any or all bids or responses, to waive informalities and make the award or any portion thereof that, in the City's sole and absolute judgement, will be in the best interest of the City in any manner thereof.

Staff present were:
 Heather Whitmore, Community Development Director
 Catherine Ponson, City Clerk

**City of Neptune Beach
 Bid No. 2026-01
 Impact Fee Study – RFP Score Sheet**

Bid Reviewer Name:

R Pike

Bidder Name:	Bid Amount	Quality of Firm and Experience 0-25 points	Qualifications of Staff 0-15 points	Project Approach 0-25 points	History of documented customer satisfaction with similar uses 0-15 points	Project Cost 0-20 points	Total Points
Arcadis	\$125,000.00	22	11	20	10	16	79
DTA	\$82,555.00	23	15	22	11	19	91
FCS, A Bowman Company	\$88,000.00	23	13	22	10	18	86
NUE Urban Concepts	\$324,875.00			Not responsive			
Raftelis	\$120,000.00	25	14	23	15	17	94
Stantec	\$79,025.00	24	12	21	13	20	90
A copy of the unofficial handwritten bid/proposal tabulation provided at the bid opening is subject to final verification by staff							

* The City of Neptune Beach reserves the right to accept any bid or response, reject any or all bids or responses, to waive informalities and make the award or any portion thereof that, in the City's sole and absolute judgement, will be in the best interest of the City in any manner thereof.

Staff present were:
 Heather Whitmore, Community Development Director
 Catherine Ponson, City Clerk

**City of Neptune Beach
 Bid No. 2026-01
 Impact Fee Study – RFP Score Sheet**

Bid Reviewer Name:

M. Owens

Bidder Name:	Bid Amount	Quality of Firm and Experience 0-25 points	Qualifications of Staff 0-15 points	Project Approach 0-25 points	History of documented customer satisfaction with similar uses 0-15 points	Project Cost 0-20 points	Total Points
Arcadis	\$125,000.00	22	11	21	10	15	79
DTA	\$82,555.00	25	13	22	11	18	89
FCS, A Bowman Company	\$88,000.00	25	13	24	12	17	91
NUE Urban Concepts	\$324,875.00			Not responsive			
Raftelis	\$120,000.00	25	14	25	15	16	95
Stantec	\$79,025.00	24	12	21	14	19	90
A copy of the unofficial handwritten bid/proposal tabulation provided at the bid opening is subject to final verification by staff							

* The City of Neptune Beach reserves the right to accept any bid or response, reject any or all bids or responses, to waive informalities and make the award or any portion thereof that, in the City's sole and absolute judgement, will be in the best interest of the City in any manner thereof.

Staff present were:
 Heather Whitmore, Community Development Director
 Catherine Ponson, City Clerk

**City of Neptune Beach
 Bid No. 2026-01
 Impact Fee Study – RFP Score Sheet**

**Bid Reviewer Name:
 H Whitmore**

Bidder Name:	Bid Amount	Quality of Firm and Experience 0-25 points	Qualifications of Staff 0-15 points	Project Approach 0-25 points	History of documented customer satisfaction with similar uses 0-15 points	Project Cost 0-20 points	Total Points
Arcadis	\$125,000.00	22	11	20	10	15	78
DTA	\$82,555.00	23	13	22	11	19	88
FCS, A Bowman Company	\$88,000.00	24	13	22	13	18	90
NUE Urban Concepts	\$324,875.00			Not responsive			
Raftelis	\$120,000.00	25	14	24	15	17	95
Stantec	\$79,025.00	24	12	21	13	20	90
A copy of the unofficial handwritten bid/proposal tabulation provided at the bid opening is subject to final verification by staff							

* The City of Neptune Beach reserves the right to accept any bid or response, reject any or all bids or responses, to waive informalities and make the award or any portion thereof that, in the City's sole and absolute judgement, will be in the best interest of the City in any manner thereof.

Staff present were:
 Heather Whitmore, Community Development Director
 Catherine Ponson, City Clerk



PROCLAMATION

City of Neptune Beach

WHEREAS, public works professionals focus on infrastructure, facilities, and services that are of vital importance to sustainable and resilient communities and to public health, high quality of life, and well-being of the people of the **City of Neptune Beach**; and,

WHEREAS, these infrastructure, facilities, and services could not be provided without the dedicated efforts of public works professionals, who are engineers, managers, and employees at all levels of government, who are responsible for rebuilding, improving, and protecting our water supply, water treatment and solid waste systems, public buildings, and other structures and facilities essential for our citizens; and,

WHEREAS, it is in the public interest for the citizens, civic leaders, and children in the **City of Neptune Beach** to gain knowledge of and maintain an ongoing interest and understanding of the importance of public works and public works programs in their respective communities; and,

WHEREAS, the year 2026 marks the 66th Annual National Public Works Week sponsored by the American Public Works Association/Canadian Public Works Association be it now,

NOW, THEREFORE, be it resolved that by virtue of the authority vested in me as Mayor of the City of Neptune Beach and the City Council, this **18th day of May 2026**, do hereby proclaim the week of May 17-23, 2026 as

NATIONAL PUBLIC WORKS WEEK

I urge all citizens to join with representatives of the American Public Works Association and government agencies in activities, events, and ceremonies designed to pay tribute to our public works professionals, engineers, managers, and employees, and to recognize the substantial contributions they make to protecting our national health, safety, and advancing quality of life for all.




Corrine Bylund, Mayor



**CITY OF NEPTUNE BEACH
CITY COUNCIL MEETING
STAFF REPORT**

AGENDA ITEMS:	Proposed Ordinance 2026-: Amendment of Sec. 18-3
SUBMITTED BY:	Paul Waters, City Attorney Sponsored by Mayor Cori Bylund
DATE:	May 12, 2026
BACKGROUND:	<p>Sec. 18-3 of Chapter 18, Article I, of the Neptune Beach Code of Ordinances provides procedural regulations for application and permitting of special events within the City of Neptune Beach.</p> <p>Amendment of this section clarifies existing procedures for improved efficiency and anticipates the adoption of a permitting fee schedule by City Council resolution.</p>
RECOMMENDATION:	Discuss and move forward for First Read on June 1, 2026
ATTACHMENTS:	<ol style="list-style-type: none"> 1. Draft Proposed Ordinance 2026-__ 2. Business Impact Estimate provided in accordance with section 166.041(4), Florida Statutes.

SPONSORED BY:
MAYOR CORRINE BYLUND



ORDINANCE NO. 2026-____

A BILL TO BE ENTITLED

AN ORDINANCE OF THE CITY OF NEPTUNE BEACH, FLORIDA, AMENDING THE CODE OF ORDINANCES - SECTION 18-3, SPECIAL EVENTS, ARTICLE I, CHAPTER 18 STREETS, SIDEWALKS AND OTHER PUBLIC PLACES; PROVIDING CODIFICATION, CONFLICTS, SEVERABILITY, AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, Section 18.3; Chapter 18 of the City of Neptune Beach’s Code of Ordinances regulates special events held on City public property; and

WHEREAS, the City is desirous of amending, and has determined it is in the best interest of the safety and welfare of its citizens to amend, language clarifying certain rules governing special event application and permitting procedures.

NOW, THEREFORE, BE IT ENACTED BY THE CITY COUNCIL ON BEHALF OF THE PEOPLE OF THE CITY OF NEPTUNE BEACH, FLORIDA that:

SECTION 1. The Code of Ordinances, City of Neptune Beach, Florida is hereby amended in accordance with Exhibit “A”, which is hereby incorporated into this Ordinance. The text amendments are as follows: (~~strikethrough~~ text shall mean deletions and underlined / highlighted text shall mean additions):

SECTION 2: Codification. The provisions of this Ordinance shall become and be made a part of the *Code of Ordinances of the City of Neptune Beach, Florida* and the sections of this Ordinance may be renumbered or re-lettered to accomplish such intention and the word “Ordinance”, or similar words, may be changed to “Section,” “Article”, or other appropriate word; provided, however, that Sections Three, Four, Five, and Six shall not be codified.

SECTION 3. Conflict. All ordinances, resolutions, official determinations, or parts thereof previously adopted or entered by the City or any of its officials and in conflict with this ordinance are repealed to the extent inconsistent herewith.

SECTION 4. Severability. If a Court of competent jurisdiction at any time finds any provision of this Ordinance to be unlawful, illegal, or unenforceable, the offending provision shall be deemed severable and removed from the remaining provisions of this Ordinance which shall remain in full force and intact.

SECTION 5. Effective Date. This ordinance shall immediately take effect upon second reading and approval.

PASSED AND ADOPTED by the City Council of the City of Neptune Beach, Florida, this ___ day of _____, 2026.

VOTE RESULTS OF FIRST READING: (Date _____)

Mayor Cori Bylund _____
Vice Mayor Nia Livingston _____
Councilor Josh Messinger _____
Councilor Brent Rogers _____
Councilor Tim Horvath _____

VOTE RESULTS OF SECOND READING: (Date _____)

Mayor Cori Bylund _____
Vice Mayor Nia Livingston _____
Councilor Josh Messinger _____
Councilor Brent Rogers _____
Councilor Tim Horvath _____

Cori Bylund, Mayor

ATTEST:

Catherine Ponson, City Clerk

Approved as to form and content:



Paul Waters, City Attorney

EXHIBIT A

Sec. 18-3. Special Events.

All special events which are held on public property must adhere to the following rules and regulations:

- 1) All special events taking place on public property must have a permit from the city manager before any such events take place. The city manager may attach to the permit those requirements he may deem necessary to protect the public and city's interest.
- 2) All parties interested in staging a special event must provide insurance for the event in amounts set by the city manager. The [parties staging such] event may be required to take out additional insurance naming the city as the beneficiary.
- 3) All parties staging an event may be subject to a performance bond set by the city manager to insure [that] the city Code and permit requirements are upheld by the event.
- 4) All requirements set by the city manager as part of his written approval must be upheld by the event. Failure to do so may result in a closing of the event by the public safety director or the police chief.
- 5) All special events permitted by the city manager must be sponsored by a nonprofit corporation for a charitable purpose. Any special event to be held for-profit corporation must have prior approval by the city council.
- 6) Before any request for a special event is permitted, those responsible for the event must provide a detailed plan including all aspects of the events (activities, awards, parking, insurance, etc.).
- 7) All financial information and records which may be related to the event will be made available to the city finance director.
- 8) All parties staging a special event are required to abide by the city Code and Florida Statutes. Failure to do so will require the event to be cancelled.
- 9) No sales or rentals of any kind will be permitted on the ocean beach.
- 10) All special events using alcohol must have prior approval by the city council.
- 11) All requests for special events shall be submitted to the city manager at least ~~require thirty (30)~~ sixty (60) days' prior to the special event start date notification.
- 12) Permits for special events shall be provided to applicants subject to any applicable fee schedule adopted by resolution of the City Council.

(Ord. No. 2004-07, § 1, 6-7-04)



Business Impact Estimate

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

Proposed ordinance's title/reference: **AN ORDINANCE OF THE CITY OF NEPTUNE BEACH, FLORIDA, AMENDING THE CODE OF ORDINANCES - SECTION 18-3, SPECIAL EVENTS, ARTICLE I, CHAPTER 18 STREETS, SIDEWALKS AND OTHER PUBLIC PLACES; PROVIDING CODIFICATION, CONFLICTS, SEVERABILITY, AND PROVIDING AN EFFECTIVE DATE.**

This Business Impact Estimate is provided in accordance with section 166.041(4), *Florida Statutes*. If one or more boxes are checked below, this means the City is of the view that a business impact estimate is not required by state law¹ for the proposed ordinance, but the City is, nevertheless providing this Business Impact Estimate as a courtesy and to avoid any procedural issues that could impact the enactment of the proposed ordinance. This Business Impact Estimate may be revised following its initial posting.

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

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

In accordance with the provisions of controlling law, even notwithstanding the fact that, an exemption noted above may apply, the City hereby publishes the following information:

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

The Ordinance clarifies procedural requirements for applying for and obtaining a permit for special events.

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

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

(a) None

(b) None calculable at this time. The ordinance anticipates the adoption of a future fee schedule by resolution, which shall apply to permit issuance for special events and may impact private businesses seeking such permits.

(c) No new regulatory costs beyond those already existing under current permitting procedures.

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

Impact not calculable. This ordinance will only impact those businesses which actively choose to apply for a special event permit.

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

N/A



**CITY OF NEPTUNE BEACH
CITY COUNCIL MEETING
STAFF REPORT**

AGENDA ITEM:	Workshop Agenda Item #6A REQUEST FOR PROPOSAL (RFP) Community Redevelopment Area Consulting Services – 2026-02
SUBMITTED BY:	Heather Whitmore, AICP, PTP, Community Development Director
DATE:	May 18, 2026
BACKGROUND:	<p>The City of Neptune Beach, Florida sought proposals from qualified firms or individuals with experience in redevelopment, neighborhood planning, revitalization, and the implementation of a Community Redevelopment Area (CRA) to provide assistance in developing and implementing Community Redevelopment Areas.</p> <p>We received one response.</p>
RECOMMENDATION:	Staff recommends review of the response and consideration of alternatives to a CRA.
ATTACHMENT:	Ex A) Inspire response - REQUEST FOR PROPOSAL (RFP) Community Redevelopment Area Consulting Services 2026-02

NEPTUNE BEACH, FL

Community Redevelopment Area Consulting Services

Re: RFP 2026-02

May 1, 2026, 2:00pm

Copy

Table of Contents:

A. Qualifications & Experience - p.6

B. Description of Projects - p. 34

C. Cost Proposal - p. 44

D. Licenses/Certifications/Insurance - p. 48

E. References - p. 54

F. Geographical Proximity - p. 62

G. Required Forms - p. 66

COVER LETTER

May 1, 2026
City of Neptune Beach
Attn: Catherine Ponson, CMC, FCPC, City Clerk's Office
116 First Street, Neptune Beach, FL 32266

Re: RFP 2026-02
Community Redevelopment Area Consulting Services

Dear Members of the Selection Committee,

Neptune Beach is a close-knit, built-out coastal community where residents place a strong value on neighborhood character, livability, and local decision-making. With about 2.3 square miles of land and limited capacity for outward growth, the City has experienced little overall population change in recent years, consistent with its mature development pattern. Community conversations and recent planning efforts have increasingly focused on how to thoughtfully reinvest in long-standing commercial areas and underutilized properties, particularly along Atlantic Boulevard, so that redevelopment strengthens the local economy while remaining compatible with surrounding neighborhoods.

This emphasis has been articulated by Neptune Beach Community Development Director Heather Whitmore, who has noted, "We are a community of residential folks and schools. All of the redevelopment that we bring in is going to meet the needs of the community, and everybody's going to feel comfortable staying here and remaining in place in their residential community." In this context, the City's exploration of a CRA reflects a thoughtful, community-guided approach to managing reinvestment.

Inspire brings extensive experience assisting Florida municipalities with CRA formation and redevelopment planning, particularly in built-out coastal and established communities. Our interdisciplinary team integrates land use planning, redevelopment finance, market analysis, and meaningful public engagement to produce clear, implementable CRA documents that meet statutory requirements and incorporate local priorities. We are proud to partner with **Haskell** to produce sound analysis paired with community-supported outcomes that endure beyond plan adoption.

We appreciate the City's consideration of our proposal and would be honored to work with City staff, elected officials, boards, and the Neptune Beach community to advance a clear and responsive CRA framework. Our team is prepared to begin work promptly and to meet the City's schedule requirements.

Thank you for your time and consideration.

Sincerely,
Inspire Placemaking Collective, Inc.



Megan Barrow, AICP
Project Manager

mbarrow@inspireplacemaking.com



George Kramer, AICP
President/Authorized Representative

gkramer@inspireplacemaking.com

EXHIBIT "A"



**CONTACT SHEET
CITY OF NEPTUNE
BEACH, FL**

Name: Inspire Placemaking Collective, Inc. _____

Federal Taxpayer ID: 92-1495717 _____

Mailing Address: 4767 New Broad Street _____

City, State, & Zip Code: Orlando, FL 32814 _____

Telephone: 407.917.0441 _____ **Fax:** N/A _____

Cell Phone: 407.202.8387 _____

Email: gkramer@inspireplacemaking.com _____

Submitted By:  | George Kramer _____

Title: President _____

Vendor Accepts Credit Cards*: Yes No (Please Circle)

Accounting Contact:
Name: Nancy Pfaff _____ **Title:** Controller _____

Email Address: npfaff@inspireplacemaking.com _____ **Phone:** 203.710.6149 _____

***See preferred method of payment under "Prompt Payment Act" section of the General Conditions**

A

Qualifications & Experience





*Beaches Town Center
Neptune Beach, FL*

OUR PURPOSE

Inspire

Partnering with local governments to create great places, safe streets, and thriving communities.

For cities and counties focused on results — protecting community character, enhancing quality of life, and fostering high-wage jobs — Inspire offers a different approach to consulting. Building a talented team, instilling grit, and fostering long-term client partnerships is about more than winning the next contract. This unique model provides a foundation for transformational change. Focusing on people and communities, Inspire has built a shared work ethos that is mission-driven, interdisciplinary, and focused on implementation.

Community Redevelopment Plans can range from basic, statute-compliant documents to more comprehensive frameworks that guide long term investment. Yet even the most robust plans must balance flexibility with clear priorities to support effective implementation. Because agencies may only expend TIF funds on projects explicitly included in the plan, the use of overly broad language and wide-ranging policies can be tempting. However, without defined priorities, this approach often results in inaction, delay, or unfocused decision making. Inspire produces plans that provide a clear vision, supported by grounded policies and strategic phasing, so local governments and redevelopment agencies have both the structure they need to act and the flexibility to adjust as conditions change.

Mission-driven. Interdisciplinary. Focused on Implementation.

69

Comprehensive
Plan Projects

72

Land
Development
Code Projects

55

Redevelopment
Projects

10

Development
Review Clients



Primary Contact:

Megan Barrow, AICP, Project Manager
407.906.6591

mbarrow@inspireplacemaking.com



Around the Corner & Around the Globe

For over 50 years, Haskell has built a reputation for technical strength as a design-builder. Haskell’s Planning & Conceptual Design Team builds on this legacy, thoughtfully integrating our in-house team of planners, architects, landscape architects, engineers and visualization specialists to create better places for all.

Established in 1965, Haskell’s integrated project delivery model has established a creative thinking process combined with innovative design that continue to exceed the expectations of today’s multi-faceted clients. Haskell has 20+ locations across the US, including our local office at 701 San Marco Blvd, Ste 1400, Jacksonville, FL 32207. Additionally, Haskell provides solutions in 7+ international locations including Mexico, Colombia, Ecuador, China, Singapore, Malaysia, and the Philippines.

From cities and campuses to transportation networks and the natural environment, we plan, design, and implement people focused solutions. Our goal is to help create healthy, vibrant, safe, accessible, and resilient communities and infrastructure that reflect the values and aspirations of those we serve. Our work and perspective are rooted in the long view, aligning land use, transportation, housing, infrastructure, and economic development around shared community goals to help communities grow with intention, balancing change with character and making smarter use of public and private investments. We bring future visions to life at the human scale, focusing on streets, parks, waterfronts, downtowns, and everyday spaces—turning them into welcoming, thriving, active places that reflect local identity and culture. Because the best place don’t happen by accident – they happen by design.

PLANNING & CONCEPTUAL DESIGN SERVICES

- Community, District & Neighborhood Planning
- A Transportation Planning & Engineering
- A Complete Streets & Safety Planning Vision Zero
- A Greenways & Park Master Planning
- A Codes and Design Guidelines
- A Revitalization & Redevelopment
- A Public Engagement, Strategic Communications & Storytelling
- A Sustainability & Resilience Planning
- A Urban Design & Visualization
- A Campus Master Planning

Primary Contact:
Fred Jones, AICP, RSP1
904.307.7008
fred.jones@haskell.com

ORGANIZATIONAL CHART

Project Manager Experience

Project Manager Megan Barrow brings more than 18 years of professional experience. Her background provides a practical understanding of the operational, legal, and political complexities faced by Florida municipalities. Megan has managed and supported Community Redevelopment Plans, Findings of Necessity, downtown and corridor revitalization efforts, and land development code updates, with direct responsibility for schedules, budgets, consultant coordination, and public processes.

She has hands-on experience implementing transportation and streetscape projects, working closely with FDOT, engineers, planners, and public works staff, and creating capital improvements budgets and funding strategies. Earlier in her career, Megan worked in journalism at major news outlets including the Miami Herald, experience that strengthens her ability to anticipate community concerns, manage public perception, and support clear, defensible communication with elected officials. This combination of technical planning expertise and communications leadership supports successful, implementable CRA outcomes grounded in public trust.



Megan Barrow, AICP
Project Manager



George Kramer, AICP
Principal-in-Charge



Julia Clark, AICP Candidate
Deputy Project Manager



Erik Bredfeldt, PhD, AICP
Senior Reviewer/Director of
Economic Development



Frederick Jones, AICP, RSP1
Local Liaison/Transportation
Lead (Haskell)

Redevelopment Planning



Elena Oertel, AICP
Planner



Jeremy Griffith, AICP
Planner



Jose Fernandez, AICP Candidate
Planner



Alex Kozela
Planner

Urban & Graphic Design



Viviana Castro, PLA
Principal Landscape Architect



Abigail Shemoel
Senior Urban Designer



Lainie Jones
Senior Graphic Designer



Addie Sherman
Senior Graphic Designer

Haskell



Brandie Miklus, AICP
Public Engagement Specialist



Mikhail Alert, AICP
Regulatory Planning Specialist



Samir Mutjaba
Visualizations Specialist



MEGAN BARROW, AICP

Project Manager

Megan is passionate about leveraging land use and transportation investments to support community growth, especially in areas facing environmental and economic challenges. She brings interdisciplinary experience in transportation planning and engineering, comprehensive planning and zoning, GIS mapping and data analysis, and professional writing and editing to each project. **AICP #33902**

9 Years of Experience

8 Months with Inspire

Education

Master of City & Regional Planning, Georgia Institute of Technology

Bachelor of Arts, Journalism and Urban Practice and Policy, University of Richmond

Skills

Comprehensive Planning
Transportation Planning
Corridor Planning
Land Development Codes
Development Review
GIS Mapping
Community Engagement
Professional Writing & Editing
Grant Writing

Software

Microsoft Office (Word, Excel, PowerPoint)
ArcGIS
Adobe Creative Suite
SketchUp
Tableau

Community Redevelopment Plan Update

Planner | Auburndale, FL

- Coordinated multi-layered analysis of community needs to create capital improvements list
- Led public workshop at city council to actively engage elected officials and residents on needs

Downtown Community Redevelopment Plan

Planner | Kissimmee, FL

- Coordinated data synthesis and presented findings to elected officials

Finding of Necessity Study & Community Redevelopment Plan Update

Project Manager | Live Oak, FL

- Led staff team in data analysis, data synthesis and catalyst site design

Finding of Necessity Study & Community Redevelopment Plan Update

Planner | Lake City, FL

- Assisted in public meeting facilitation and writing community vision

HIP-TI Strategic Recommendations

Senior Planner | Seminole County, FL

- Updated GIS maps, municipal parcel data and market data for county’s land use and market analysis

Economic Development – Federal Reserve Bank

Intern | Atlanta, GA

- Assisted Community and Economic Development research team in connecting community development organizations with local banks (CDFIs), educational institutions and government resources

Sign Code Rewrite

Project Manager | Altamonte Springs, FL

- Updated City’s sign code for compliance with federal court rulings, while incorporating best practices for digital signage in public spaces and on electric and autonomous vehicles and ensuring the code supports the city’s vision for its development

Sign Code Rewrite

Planner | Kissimmee, FL

- Contributed to multi-year project to make City’s sign code compliant with federal court rulings and to support the newly created form-based code

Curry Ford Special Plan Area (Zoning Overlay)

Project Manager | Orlando, FL

- Wrote and successfully guided to adoption land development code updates to improve urban design in one of Orlando’s central, fast-growing neighborhoods

Sign Code Rewrite

Planner | Orlando, FL

- Contributed to overhaul of City’s sign code to comply with federal rulings and to significantly simplify standards and language with the goals of better customer compliance and staff efficiency

Curry Ford Vision Plan

Project Planner | Orlando, FL

- Managed the implementation of and public outreach for a 2.5-mile neighborhood corridor plan, including growth management policy, land development code, and roadway updates to improve urban design

SR 436 Transit Oriented Development Study

Project Manager | Orlando, FL

- Managed the City of Orlando’s contributions to a land use study for the city and local transit agency (LYNX) on the feasibility of implementing Bus Rapid Transit along a major corridor stemming from Orlando International Airport

FDOT-A National Synthesis of Transit & Complete Streets Practices

Senior Planner | Orlando, FL

- Researched and compiled case studies from across the country on best practices in ensuring transit plays an integral role in increasingly popular complete-streets implementation



JULIA CLARK, AICP CANDIDATE

Deputy Project Manager

Julia is a planner focused on urban redevelopment and revitalization. Her experience with Community Redevelopment Plans, Form-Based Codes, and Streetscape Planning places her at the intersection of planning, urban design, and landscape architecture, where she works to bridge gaps between disciplines. She leverages her writing skills to translate planning jargon into clear, approachable language, empowering a broad range of community members to participate in the planning process.

AICP Candidate

Education

Master of Urban & Regional Planning, University of New Orleans

Bachelor of Business Administration in Economics & International Business, University of Georgia

International Studies in Business & Culture, Universidad Autónoma de Barcelona, Spain

4 Years of Experience | 1 Year, 8 Months with Inspire

Redevelopment Plan for the Goulds CRA

Planner | Miami-Dade County, FL

- Conducted a comprehensive site tour to evaluate physical conditions within the Community Redevelopment Area (CRA), including housing stock and infrastructure, and developed an inventory of new and ongoing development projects
- Analyzed existing conditions, demographic trends, and community feedback to inform the development of projects and programs for inclusion in the CRA Plan
- Performed a Tax Increment Financing (TIF) analysis using property appraiser data to forecast future revenue for the CRA Trust Fund
- Developed a 10-year action plan and budget to guide CRA fund expenditures, with a strategic focus on improving critical infrastructure, mitigating displacement risks, and enhancing the community's sense of place

Melrose-Mercy Neighborhood Plan Update

Planner | St. Petersburg, FL

- Assisted with final recommendations matrix and reviewed final document for consistency

Downtown CRA Master Plan & Form-Based Code

Planner | Tarpon Springs, FL

- Analyzed zoning regulations to identify conflicts and opportunities for consolidation; recommended modification and simplification
- Developed a user-friendly and enforceable form-based code to replace the downtown Smart Code

Downtown Form-Based Code

Planner | Tarpon Springs, FL

- Analyzed zoning regulations to identify conflicts and opportunities for consolidation; recommended modification and simplification of the code



GEORGE KRAMER, AICP

Principal-in-Charge

Strategy and implementation are at the forefront of George’s approach to planning. He has a keen understanding of technical, administrative, and political issues and specializes in the successful execution of complex projects. George is committed to an interdisciplinary approach to Placemaking that emphasizes collaboration across professional disciplines to deliver innovation and value to clients. **AICP #020533**

Education

Master of Urban & Regional Planning, University of Florida

Bachelor of Political Science, University of Florida

26 Years of Experience | 14 Years, 4 Months with Inspire

West City Finding of Necessity (FON) & Community Redevelopment Plan

Principal-in-Charge | St. Augustine, FL

- Provided guidance on policy development and plan structure
- Provided QA/QC and review of all deliverables

Community Redevelopment Plan Update (Channel District)

Principal-in-Charge | Tampa, FL

- Facilitated community workshops
- Directed redevelopment strategy

Community Redevelopment Plan Update

Principal-in-Charge | Pinellas Park, FL

- Directed the redevelopment strategy
- Provided senior review of deliverables’ key details

Community Redevelopment Plan Update

Principal-in-Charge | Lake Wales, FL

- Facilitated community workshops
- Directed the redevelopment strategy

Community Redevelopment Plan Update (Downtown)

Principal Planner | Kissimmee, FL

- Advanced plan organization and development
- Provided senior review of deliverables

Community Redevelopment Plan Update (Downtown)

Principal-in-Charge | St. Augustine, FL

- Developed the strategic goals and a 5-point Action Plan
- Drafted policies and directed the development of the Conceptual Master Plan
- Provided Senior Review and QA/QC of all deliverables

Community Redevelopment Plan Update

Principal-in-Charge | Auburndale, FL

- Offered strategic guidance for plan development
- Provided QA/QC and review of all deliverables



ERIK BREFDELDT, PHD, AICP

Senior Reviewer/Director of Economic Development

Erik has 34 years of experience in administrative and project management, with a focus on community planning and economic development. Activities include urban planning/development services, community/economic development, and project management through an internal/external partnership philosophy emphasizing the balance between community and markets.

AICP #011971 | NDC - EDFP

Education

Doctor of Philosophy in Urban & Regional Planning, University of Florida

Master of Arts in Urban & Regional Planning, University of Florida

Bachelor of Arts in Economics, Muhlenberg College

34 Years of Experience | 3 Years, 1 Month with Inspire

Community Redevelopment Plan Update (Downtown)

Project Director | St. Augustine, FL

- Assisted with supporting final re-write and review of the update to the Community Redevelopment Plan
- Reviewed Plan contents with client

West City Finding of Necessity (FON) & Community Redevelopment Plan

Project Manager | St. Augustine, FL

- Conducted community tour with client
- Prepared a FON Study for potential establishment of the West City CRA

Melrose-Mercy Neighborhood Plan Update

Project Director | St. Petersburg, FL

- Attended the kick-off meeting with Client
- Performed field survey in Melrose-Mercy Neighborhood

Palmetto Park Neighborhood Plan Update

Project Director | St. Petersburg, FL

- Supported redevelopment team in review of substance of deliverables and project approach

Market Analysis & Commercial Study

Project Manager | Osceola County, FL

- Worked on a Land Use and Market Analysis for the entirety of Osceola County
- Worked on two sub market area Land Use and Market Analysis regarding the Narcoossee and St. Cloud areas

Community Redevelopment Plan

Senior Reviewer | Port Richey, FL

- Supported redevelopment team in review of substance of deliverables and project approach



FRED JONES, AICP, RSP1

Local Liaison/Transportation Lead

Fred is the director of Haskell’s Planning & Conceptual Design group. He has years of industry experience in multimodal transportation planning, safety, complete streets and active transportation, transit-oriented development, as well as experience in land use development, coding, and regulatory issues. Fred brings a focus on implementation through strategy, policy and design to resolve community and infrastructure barriers, inspiring communities to create lasting spaces and places.

AICP #020918; RSP1 #995

Education

Master of Science in Urban & Regional Planning, Florida State University

Bachelor of Arts in Anthropology, University of South Florida



24 Years of Experience | 4 Years with Haskell

City of Neptune Beach, FL

City Councilor & Vice Mayor | Neptune Beach, FL

- Led implementation of the first area-wide Vision Plan and comprehensive land development code rewrite
- Launched pilot priced parking program and subsequent permanent parking demand management system
- Led funding and implementation to establish East Coast Greenway

Multimodal Network and Safety Improvements Project (West River District)

Project Advisor & Planner | Tampa, FL

- Helped increase connectivity and local economic activity and enhance livability and public health

Mayport Strategic Development Plan

Project Advisor & Planner | Jacksonville, FL

- Produced a two-phased development strategy for along the St. Johns River
- Built community consensus for desired visual and architectural elements

Commercial Corridor Design Guidelines & Town Square Code

Project Advisor & Planner | Orange Park, FL

- Established and drafted commercial corridor design guidelines to improve community character and aesthetics
- Provided strategic oversight throughout the design guidelines, form-based code, and future land use element goals, objectives, and policies development

Town Visioning Plan

Project Advisor & Planner | Orange Park, FL

- Developed innovative planning and development strategies to promote a diverse economy, vibrant rural and suburban areas, historic preservation structures, and facilities
- Led a “Build A Street” workshop with the Town to help the community re-imagine their key corridors



ELENA OERTEL, AICP

Planner

Elena is an urban planner who integrates analytical thinking into every stage of the planning process, supporting comprehensive planning, economic development, sustainable urban design, trail planning, grant applications, and community engagement. By leveraging spatial analyses and market analytics, she delivers data-driven insights that help clients make informed decisions to foster vibrant, thriving communities. **AICP #370035**

Education

Master of City & Regional Planning, Georgia Institute of Technology

Bachelor of Science in Sustainability, Furman University

7 Years of Experience | 1 Year, 2 Months with Inspire

Osceola Market Analysis & Commercial Study

Deputy Project Manager | Osceola County, FL

- Prepared a Countywide Commercial Land Use Summary Report analyzing countywide demographic and commercial real estate trends for various commercial uses to provide context and relative data to inform the market analysis
- Analyzed key industry shifts, demographic and economic drivers, retail leakage, and best practices for integrating commercial uses into mixed-use environments, as well as square footage needs per capita for retail, office (including medical and professional services), restaurant/entertainment, and industrial/flex space, comparing local conditions to national benchmarks
- Refined the draft market area boundaries for the study area using data-driven best practices

Downtown Master Plan

Land Use Planner | Tarpon Springs, FL

- Developed the existing conditions sections for demographic, economic, land use, and transportation trends, including the development of supporting graphics and maps to illustrate key findings
- Conducted the Downtown Economic Analysis that included a parcel inventory, local real estate analysis, and a strengths, weaknesses, opportunities, and threats (SWOT) evaluation

CRA Downtown Master Plan

Land Use Planner | Silver Springs, FL

- Developed the market study and existing conditions analysis, examining demographic and economic trends and creating supporting graphics and maps to highlight key insights
- Led the real estate and parcel analysis to assess trends impacting the CRA's tax revenue and base



JEREMY GRIFFITH, AICP

Planner

Jeremy is an Atlanta-based Planning Analyst specializing in transit strategy, transportation planning, and GIS spatial analytics. His experience ranges from site selection and transit development plans to major finance and policy initiatives, including referendum support and mobility studies. He is proficient in travel demand modeling and safety analyses, utilizing Activity-Based Models and Replica data to deliver data-driven infrastructure and regional mobility solutions. **AICP #36608**

Education

Master of Urban & Regional Planning, University of Florida

Bachelor of Arts in Sustainability & the Built Environment, Specialization: Geodesign, University of Florida

3 Years of Experience | 2 Months with Inspire

Forsyth County Comprehensive Transportation Plan (CTP)

Planner | Forsyth County, GA

- Managed and produced GIS maps and analyses for the final report
- Performed Travel Demand Modeling using ARC’s Activity Based Model (ABM) to produce traffic projections, identify changes in origin destination patterns, and provide input for the analysis of projected level of traffic stress

McFarland Mobility Hub LCI Study

Planner | Forsyth County, GA

- Produced service plans for transit alternatives connecting the Mobility Hub location in South Forsyth to the proposed northern terminus of the GA 400 BRT
- Compiled research on potential emerging transportation applications for the South Forsyth area, including autonomous and connected vehicles

Paulding County Major Corridor Plan

Planner | Paulding County, GA

- Led production and analysis of roadway performance, including the integration of DRI impacts to traffic projections from ARC’s Activity Based Model
- Performed Travel Demand Modeling using ARC’s Activity Based Model (ABM) to produce traffic projections, identify changes in origin destination patterns, and provide input for the analysis of projected level of traffic stress

Zoning Map Update & Unified Development Ordinance Development

Planner | Georgetown County, SC

- Assisted in the research and production of subdivision and environmental ordinances, including code policy related to stormwater management and low impact development, bicycle and pedestrian connectivity, and beachfront management



JOSE FERNANDEZ, AICP CANDIDATE

Planner

Jose is an urban planner who is passionate about meeting the intersection of people, design, and the environment through comprehensive planning. He has experience in land use, resiliency, and environmental planning across domestic and international markets completing projects throughout the US, Caribbean, and Europe. Skilled in GIS, data analysis, and community engagement, Jose is focused on creating resilient solutions for communities. **AICP Candidate**

Education

Master of City and Regional Planning, University of Pennsylvania

Bachelor of Arts in Environmental Studies & International Relations, Rollins College

2 Years of Experience | 9 Months with Inspire

Finding of Necessity (FON) Study

Planner | Pensacola, FL

- Assisted in conducting a Findings of Necessity Analysis pursuant to Florida Statute Statutes to support the creation of new Community Redevelopment Areas

Land Development Code Assessment & Update

Planner | Pensacola, FL

- Reorganized and improved the existing Land Development Code , updating chapters based on the Phase I assessment matrix and staff feedback
- Facilitated stakeholder and community engagement workshops to identify issues and refined proposed Code improvements; prepared in-person public workshop and online input summaries
- Served as a primary client contact for project logistics, deliverables, and reporting, and coordinating internal team weekly operations

Comprehensive Plan Update

Planner | Pasco County, FL

- Assisted in preparing and facilitating a public workshop that engaged attendees in reviewing data and maps displayed at interactive stations

Comprehensive Plan Update

Planner | Polk County, FL

- Drafted Data and Analysis and updated goals, objectives, and policies

Comprehensive Plan Update & Interim Evaluation & Appraisal Review

Planner | Nassau County, FL

- Assisted in the submission of a state compliant 7-year Evaluation and Appraisal Report with supporting documentation and revised Goals, Objectives, and Policies



ALEX KOZELA

Planner

Alex is an urban planner who brings a background in community engagement and content development to thoughtful, sustainable placemaking. He focuses on public space activation and resilient urban design, with experience supporting redevelopment, zoning, and comprehensive planning initiatives. He develops digital engagement tools, including project websites, short-form video, and podcast-style audio, that helps connect communities to planning concepts.

Education

Master of City & Regional Planning, Georgia Institute of Technology

Bachelor of Arts in Communication, Saint Mary's College of California

2 Years of Experience | 1 Year, 1 Month with Inspire

Finding of Necessity Study & Community Redevelopment Plan Update

Planner | Lake City, FL

- Led drafting of the Lake City Community Redevelopment Area (CRA) Plan, including analysis, narrative content, and core plan components
- Developed maps, graphics, and TIF revenue projections to support the redevelopment framework

Unified Development Ordinance

Planner | Shelby, NC

- Rewrote and updated the UDO implementing planning best practices to improve clarity, usability, and alignment with the adopted Plan and Future Land Use Map
- Simplified ordinance language, integrated graphics and visual aids, and ensured consistency with applicable state statutes and regulatory requirements

Zoning Ordinance & Overlay District Rewrite

Community Outreach Coordinator | Stonecrest, GA

- Led steering committee meetings and managed community engagement efforts for the City of Stonecrest, including public workshops and stakeholder coordination
- Developed clear, accessible messaging and produced multimedia engagement tools, including a project website, short-form video content, and visual materials, to clearly communicate zoning updates and improve public understanding

Zoning Ordinance Rewrite

Engagement Coordinator | East Point, GA

- Led steering committee meetings and managed community engagement efforts for the City of East Point, including public workshops and stakeholder coordination



VIVIANA CASTRO, PLA

Principal Landscape Architect

Viviana is a registered landscape architect with a master's in urban planning and sustainability. She has over 13 years of experience working on visioning, streetscape design, community engagement, park design, urban and community developments, commercial spaces, branding, and wayfinding studies.
FL LA6667568

Education

Master of Urban Planning & Sustainability, Universitat Politècnica de Catalunya, Barcelona, Spain

Bachelor of Science in Landscape Architecture, University of Florida

13 Years of Experience | 1 Year, 10 Months with Inspire

Melrose-Mercy Neighborhood Plan Update

Landscape Architect | St. Petersburg FL

- Assisted in creating a framework to improve neighborhood needs
- Provided streetscape and exterior studies that would be implemented as capital improvement programs

Jax Beach Downtown Action & Implementation Plan

Landscape Designer | City of Jacksonville Beach, FL

- Led the strategy for public art and design focus areas of the visioning effort
- Managed the community outreach, developing graphics and diagrams that created opportunities for successful engagement with the Jax Beach community
- Compiled all the findings from the previous vision, current community engagement efforts, transportation, and lighting needs

Omni CRA Site Studies

Project Manager | Miami, FL

- Led the analysis efforts to create street typologies
- Managed the workshop efforts to listen to the community needs
- Managing the project in development phase

Downtown Park Conceptual Design

Project Manager | Fort Pierce, FL

- Led successful community engagement and stakeholder sessions
- Managing the project as it nears conceptual completion

Cordova Conceptual Streetscape Master Plan

Project Manager | St. Augustine, FL

- Led community engagement efforts
- Led the redesign of the street
- Managing the project as it is nearing completion



ABIGAIL SHEMOEL

Senior Urban Designer

Abigail has a strong desire to discover and design lively, sustainable places. This passion coupled with strong communication and illustration skills, has allowed her to work successfully in a variety of international settings in Latin America, the United States, and Europe. With over 17 years of professional experience as a landscape architect and planner, Abigail has delivered/managed projects at various scales including urban spaces, streets, parks, schools, transportation corridors and residential developments.

Education

Master of Science in Urban Development Planning, University of College London, UK

Bachelor of Landscape Architecture, Ball State University

17 Years of Experience | 2 Years, 2 Months with Inspire

Pinedene Design Standards

Senior Urban Designer | Southern Pines, NC

- Developed design guidelines for the transformation of Pinedene (Focus Area C)
- Led the graphic team in the production of illustrations
- Produced report design and content

Downtown Master Plan

Senior Urban Designer | Tarpon Springs, FL

- Guided the simplification of character districts and zoning
- Coordinated a detailed site inventory and analysis
- Reviewed and directed the visual narrative of the master plan

Complete King Street Master Plan

Senior Urban Designer | St. Augustine, FL

- Researched precedent park and plaza projects
- Developed concept designs for hardscape and landscape design

Cordova Conceptual Streetscape Master Plan

Senior Urban Designer | St. Augustine, FL

- Developed the analytical framework to assess street quality, function, and potential
- Conducted comprehensive analysis integrating mobility, public life, and streetscape data
- Translated findings into urban design strategies tailored to local context and policy goals
- Provided design guidance to enhance walkability, safety, and public realm experience

Community Redevelopment Plan

Senior Urban Designer | Port Richey, FL

- Defined development goals
- Outlined the strategic framework for the redevelopment plan
- Produced graphics for the project report



LAINIE JONES

Senior Graphic Designer

Lainie adds a unique perspective to Inspire’s marketing team through her continued growing knowledge of design trends, attention to detail, and extensive understanding of the Adobe Creative Suite to create successful designs in a timely manner. Lainie provides a fresh insight, along with a strong work ethic, to ensure the team’s continued success.

Education

Bachelor of Fine Arts in Emerging Media, University of Central Florida

5 Years of Experience | 3 Years, 10 Months with Inspire

Community Redevelopment Plan Update & Finding of Necessity (FON) Study

Graphic Designer | Brooksville, FL

- Designed unique project branding for presentations, workshops, and marketing collateral

Community Redevelopment Plan Update (Downtown)

Graphic Designer | St. Augustine, FL

- Assisted with report design/layout
- Helped create graphics/project branding

Economic Development Plan

Graphic Designer | Jellico, TN

- Designed marketing materials and presentations
- Converted data into visual infographics
- Created report layout design

Community Redevelopment Plan

Graphic Designer | Lauderdale Lakes, FL

- Designed unique project branding for presentations, workshops, and marketing collateral

Melrose-Mercy Neighborhood Plan Update

Graphic Designer | St. Petersburg, FL

- Designed marketing and workshop materials that were cohesive with project branding
- Assisted with report design/layout

Palmetto Park Neighborhood Plan Update

Graphic Designer | St. Petersburg, FL

- Designed marketing and workshop materials that were cohesive with project branding
- Assisted with report design/layout



ADDIE SHERMAN

Senior Graphic Designer

Addie has expertise in website design, project branding, 3D renderings, document design, and other types of informational graphics. With a background in urban planning, she brings a diverse skill set that allows her to approach design challenges with a unique perspective. Her expertise allows her to bridge the gap between technical planning concepts and community understanding.

Education

Graphic Design Continuing Education, Rhode Island School of Design

Bachelor of Urban Planning, University of Cincinnati

7 Years of Experience | 1 Year, 1 Month with Inspire

Comprehensive Plan Update & Interim Evaluation & Appraisal Review

Graphic Designer | Nassau County, FL

- Designed/drafted the project report
- Provided/created QOL dashboard graphics

Unified Development Ordinance Update

Senior Graphic Designer | Wilson County, N

- Created development standards graphics to help community members visualize language in the code

Unified Development Ordinance

Senior Graphic Designer | Hillsborough, NC

- Created code and development standard graphics to help community members visualize language in the code
- Created street cross sections to guide future development

Unified Development Ordinance Rewrite

Senior Graphic Designer | Shelby, NC

- Created project branding
- Created code and development standard graphics to help community members visualize language in the code

Unified Development Ordinance

Senior Graphic Designer | Moncks Corner, SC

- Created development standards graphics to help community members visualize language in the code

Land Development Regulations

Senior Graphic Designer | Effingham County GA

- Created 3D models depicting a proposed future residential district, with a mix of single and multi-family housing

APPROACH

Understanding of the Project

The City of Neptune Beach is evaluating the establishment of one or more Community Redevelopment Areas (CRAs) pursuant to Chapter 163, Part III, Florida Statutes. The City seeks assistance with the preparation of a Finding of Necessity, analysis of Tax Increment Financing (TIF) capacity, facilitation of public engagement, preparation of redevelopment plans, and drafting of the resolutions and ordinances necessary to implement each step of the CRA process.

Inspire’s experience working with CRAs throughout Florida has reinforced the importance of pairing statutory compliance with clear communication and community trust. We seek to advance practical, implementable redevelopment strategies and view adoption and implementation – not just plan preparation – as the ultimate measure of success.

The Inspire Approach

Throughout the process, Inspire seeks to communicate regularly and thoroughly with staff and decision-makers to ensure steady guidance and maintenance of a timely schedule. Therefore, we emphasize the importance of:

- Biweekly check-in meetings
- Memo deliverables summarizing primary tasks and events, such as Existing Conditions, Public Engagement, and TIF Projections

Task 1. Project Initiation, Coordination & Data Collection

Task 1.1 – Project Kick-off & Management

Inspire will conduct a formal kick-off meeting with City staff to confirm project goals, proposed study area boundaries, roles and responsibilities, communication protocols, and overall schedule.

- There will be an **initial discussion on public engagement** to include online platforms, project branding, and community outreach materials. An initial stakeholder list will be compiled. These will all inform development of the **Public Engagement Plan**.
- Inspire will work with staff and other agencies to **gather GIS data**.
- A **schedule of recurring biweekly meetings** with staff will be established to ensure continual communication.

Key Deliverable: Initial draft of Public Engagement Plan

Task 1.2 – Data Collection & Review

The consultant team will work with City staff, as well as reach out to appropriate county, regional, and state agencies, to **compile and review readily available data** relevant to the CRA/FON process, including:

- Comprehensive Plan and land development regulations
- Existing and future land use and zoning
- Property ownership and valuation history
- Historic preservation resources and regulatory context
- Code enforcement and public safety data (as available)
- Planned or programmed public capital investments
- Previous planning and redevelopment studies
- Demographic characteristics and socioeconomic conditions
- Transportation facilities
- Environmentally sensitive areas
- Historic and cultural resources
- General market conditions

Task 1.3 – Community Tour

The Inspire team will participate in a **two-day tour** with City staff to better understand redevelopment conditions, infrastructure context, special sites of interest, and constraints affecting the proposed CRA areas.

- Day One: Guided tour with CRA/City staff
- Day Two: Inspire documentation of conditions in targeted areas
- Either day might include stakeholder interviews



Project Example: Goulds CRA Data Collection

Data collection and review: We collaborate with our GIS and visualization team to depict key findings including context, environmental challenges, demographics, and general market conditions



Project Example: Brooksville-Hernando CRP Site Visit



Task 2. Finding of Necessity (FON) & Slum & Blight Analysis

Inspire will prepare a Finding of Necessity (Blight Study) in accordance with Sections 163.340(7) and (8), Florida Statutes. The evaluation will assess whether conditions of “slum” and/or “blight” are present within the proposed CRA areas and whether those conditions meet the statutory threshold necessary to support CRA designation. The analysis will be documented in a clear, defensible Slum and Blight Matrix suitable for public review and adoption.

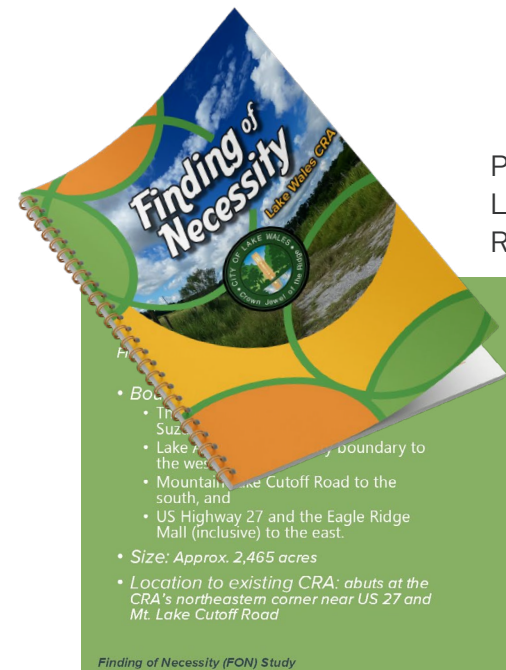
Task 2.1 – Supporting Data Analysis

Using the data obtained in Task 1, The FON will be supported by demographic, economic, land use, and property valuation analyses, as well as review of redevelopment trends and physical conditions within and adjacent to the study areas.

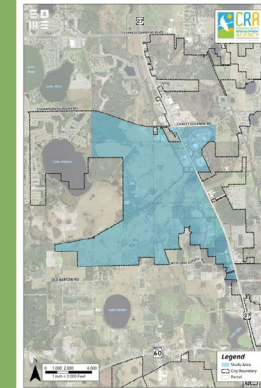
Task 2.3 – Draft and Final Finding of Necessity

A Draft Finding of Necessity Report will be provided to City staff for review and comment. Following one round of revisions, a Final Finding of Necessity Report will be prepared for presentation and adoption consideration. Inspire will create and deliver a slideshow presentation of the Finding of Necessity Report to the City Council at an adoption hearing. The team will also coordinate with Duval County leadership as needed.

Key Deliverables: Final FON Report, Presentation of FON Report to City Council for Adoption



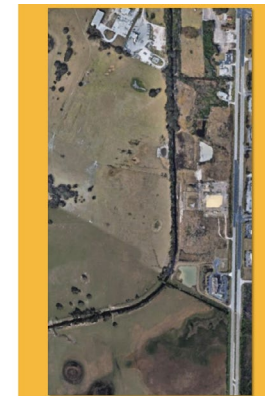
Project Example:
Lake Wales FON
Report



CONDITIONS OBSERVED

Faulty lot layout in relation to size, adequacy, accessibility, or usefulness

- Poor roadway accessibility
- Lots are too large for redevelopment
→ low level of usefulness

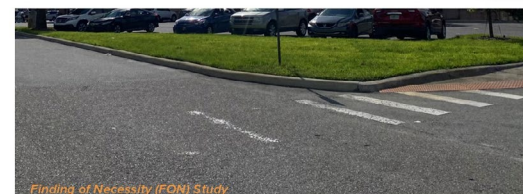
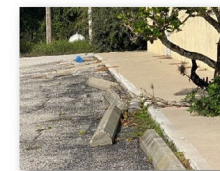


Finding of Necessity (FON) Study

CONDITIONS OBSERVED

Unsanitary or unsafe conditions

- Insufficiently maintained parking lots
- Faded crosswalks
- Deteriorated grates



Finding of Necessity (FON) Study

Task 3. Tax Increment Financing (TIF) Analysis


Inspire will prepare TIF revenue estimates for the proposed CRA areas based on current assessed values, anticipated redevelopment patterns, and the proposed CRA term. The analysis will present reasonable growth scenarios and will be formatted to support both decision making and public communication.

Key Deliverables: Technical Memo: TIF Projections

Core CRA Area (figures in USD)

Roll Year	FY	Base Year (1995) Value	Roll Growth	Preliminary Tax Roll	Increment	City Millage	95% of City Millage Value	County Millage	95% of County Millage Value	Total TIF
2025	2026	26,794,350	2.50%	78,296,482	51,502,132	9.2500	452,575	8.8000	430,558	883,133
2026	2027	26,794,350	2.50%	80,253,894	53,459,544	9.2500	469,776	8.8000	446,922	870,863
2027	2028	26,794,350	2.50%	82,260,241	55,465,891	9.2500	487,407	8.8000	463,695	903,546
2028	2029	26,794,350	2.50%	84,316,747	57,522,397	9.2500	505,478	8.8000	480,887	937,047
2029	2030	26,794,350	2.50%	86,424,666	59,630,316	9.2500	524,001	8.8000	498,509	971,385
2030	2031	26,794,350	2.50%	88,585,283	61,790,933	9.2500	542,988	8.8000	516,572	1,006,582
2031	2032	26,794,350	2.50%	90,799,915	64,005,565	9.2500	562,449	8.8000	535,087	1,042,659
2032	2033	26,794,350	2.50%	93,069,913	66,275,563	9.2500	582,397	8.8000	554,064	1,079,637
2033	2034	26,794,350	2.50%	95,396,661	68,602,311	9.2500	602,843	8.8000	573,515	1,117,540
2034	2035	26,794,350	2.50%	97,781,577	70,987,227	9.2500	623,800	8.8000	593,453	1,156,391
2035	2036	26,794,350	2.50%	100,226,116	73,431,766	9.2500	645,282	8.8000	613,890	1,196,213
2036	2037	26,794,350	2.50%	102,731,769	75,937,419	9.2500	667,300	8.8000	634,837	1,237,030
2037	2038	26,794,350	2.50%	105,300,064	78,505,714	9.2500	689,869	8.8000	656,308	1,278,868
2038	2039	26,794,350	2.50%	107,932,565	81,138,215	9.2500	713,002	8.8000	678,315	1,321,752
2039	2040	26,794,350	2.50%	110,630,879	83,836,529	9.2500	736,714	8.8000	700,873	1,365,708
2040	2041	26,794,350	2.50%	113,396,651	86,602,301	9.2500	761,018	8.8000	723,995	1,410,762
2041	2042	26,794,350	2.50%	116,231,568	89,437,218	9.2500	785,930	8.8000	747,695	1,456,943
2042	2043	26,794,350	2.50%	119,137,357	92,343,007	9.2500	811,464	8.8000	771,988	1,504,279
2043	2044	26,794,350	2.50%	122,115,791	95,321,441	9.2500	837,637	8.8000	796,887	1,552,798
2044	2045	26,794,350	2.50%	125,168,685	98,374,335	9.2500	864,464	8.8000	822,409	1,602,530
2045	2046	26,794,350	2.50%	128,297,903	101,503,553	9.2500	891,962	8.8000	848,570	1,653,506
2046	2047	26,794,350	2.50%	131,505,350	104,711,000	9.2500	920,148	8.8000	875,384	1,705,755
2047	2048	26,794,350	2.50%	134,792,984	107,998,634	9.2500	949,038	8.8000	902,869	1,759,311
2048	2049	26,794,350	2.50%	138,162,809	111,368,459	9.2500	978,650	8.8000	931,040	1,814,206
	Total						24,350,466		23,165,849	45,184,655

Project Example: Live Oak FON & CRA Technical Memo and TIF Projections



To: Nick Frigiola, City of Live Oak
From: Megan Barrow, Project Manager
Date: February 27, 2026
Reference: CRA TIF Projections and Capital Improvements

Florida law requires that a Community Redevelopment Plan (CRP) "contain a detailed statement of the projected cost of the redevelopment, including the amount to be expended on any publicly funded capital projects and any indebtedness of the CRA, the county, or the municipality proposed to be incurred for redevelopment if such is to be repaid with increment revenues."

To that end, Inspire has created budgetary guidance for your review.

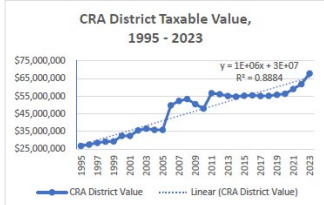
TAX INCREMENT FINANCING (TIF) PROJECTIONS

The **2025 taxable value for real property** within the boundaries of the Live Oak Community Redevelopment Area was **\$113,577,334**. This comprises \$78,296,482 from the current area and \$35,280,852 from the recent expansion area.

The following assumptions have been made:

- CRA TIF is from County and City only (with 5% administrative fee)
- City millage is 9.25; Suwannee County millage is 8.80.
- Year 2025 Taxable Value is calculated with parcel data received from the Suwannee County Property Appraiser in September 2025.

Using a linear trend of **2.5% annual property value appreciation** (a rate that is used to account for market fluctuations), **\$54.3M total is expected to be collected** for redevelopment through 2055.



Task 4. Public Engagement & Workshops

Upon adoption of a Finding of Necessity Report and direction from staff, Inspire will begin advancing the work for a Community Redevelopment Plan. Consistent with best practices and the requirements of the RFP, public engagement will commence early and continue throughout the process. The **Public Engagement Plan** drafted during Task 1 will be continually updated to reflect the needs and status of meetings and outreach efforts.

Task 4.1 – Website, Social Media, Video

Inspire will work with City staff to finalize content of the project website, using the Social Point platform which can create over 40 tools such as interactive mapping, surveys, and before/after visualizations. We will also produce at least two (2) social media posts, in up to 2 formats (Facebook, Instagram, etc.), one (1) flyer or poster for each workshop, and (1) video to promote participation in the CRA development process.

Task 4.2 – Community Workshops

Inspire will organize and facilitate a minimum of two (2) public workshops, and one (1) pop-up community event. Workshops and events will be structured to:

- Explain the CRA process and statutory requirements
- Present findings from the FON and TIF analyses
- Identify community goals, concerns, and priorities
- Inform development of redevelopment goals, policies, and projects

Workshops will be held at central locations easily accessible to residents and businesses, such as City Hall. An ideal pop-up event would be a large gathering with foot traffic, such as Beaches Green Market in Jarboe Park.

Task 4.3 – Stakeholder and Board Coordination

We will coordinate presentation of materials to support City staff meetings with City Council, the Community Development Board, the Historic Board, and other advisory bodies. Inspire may present in person at one (1) advisory board meeting as determined by staff.

Key Deliverables: Technical Memo: Community Engagement Summary; interactive project website; social media posts; engagement video



Project Example: Auburndale CRP Community Workshop



Project Example: Live Oak CRP Update Website (Scan or Click QR Code)

Task 5. Community Redevelopment Plan Preparation

Inspire will prepare a Community Redevelopment Plan consistent with Section 163.360, Florida Statutes. The Plan will include:

- Goals and objectives
- Description of existing conditions
- Identification of public and private redevelopment opportunities
- A list of potential capital projects addressing the standards of a “Workable Program”
- Implementation strategies and sequencing

The plan will be delivered in Word format with full editing capability, as requested.

Key Deliverables: Draft and final Community Redevelopment Plan, with one (1) round of revisions.

Task 6. Implementing Documents & Adoption Support

Inspire will prepare all supporting documents necessary to enact each procedural step of the CRA process, including:

- Notices to taxing authorities
- Draft resolutions and ordinances
- Recommendation and adoption materials for the Redevelopment Plan
- Establishment of the Redevelopment Trust Fund

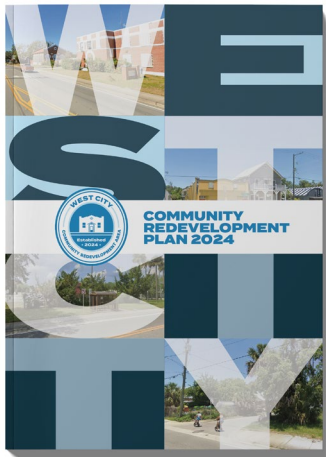
We will support City staff through all required hearings and adoption meetings with presentation materials; we will present at one (1) adoption meeting.

Key Deliverables: Notices, draft legal documents, presentation at one (1) adoption meeting

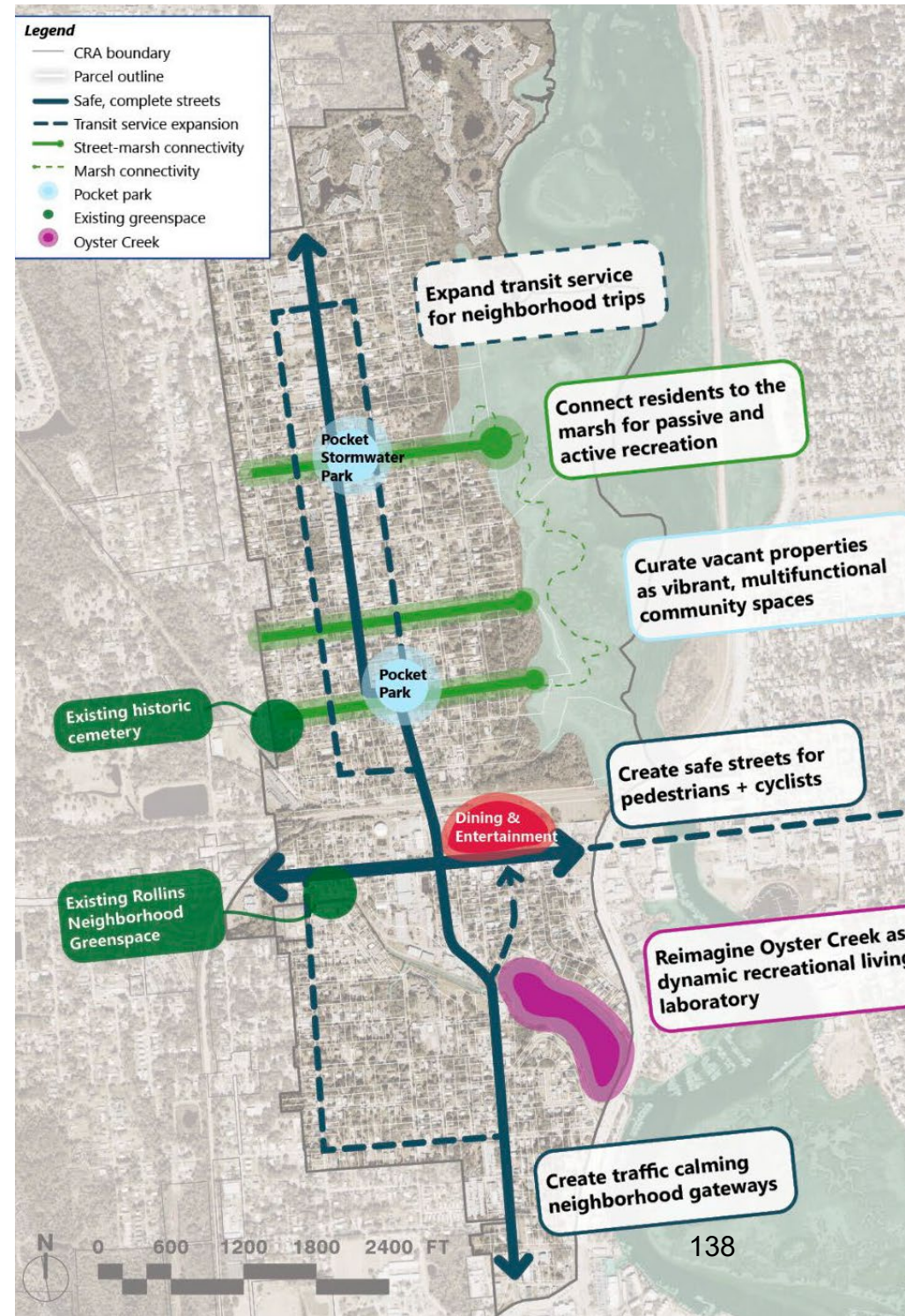
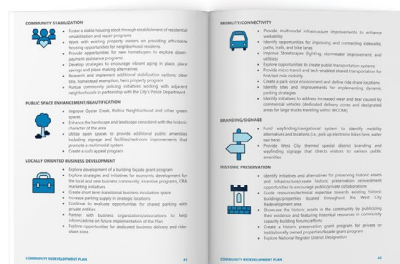
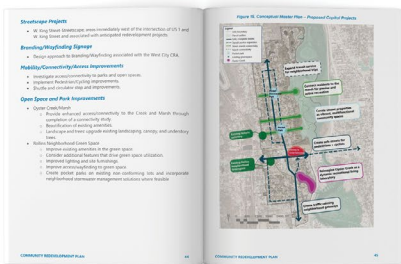
Task 7. Legal Description

Once the Finding of Necessity is complete and the City has decided the boundary of the new CRA for which to request approval, Inspire will contract with a Florida-licensed surveyor to prepare a legal description and sketch of description. A legal description is required by Florida Statutes in order to adopt a Community Redevelopment Plan.

Key Deliverables: A PDF map, Word document, and GIS shapefile of the CRA Boundary

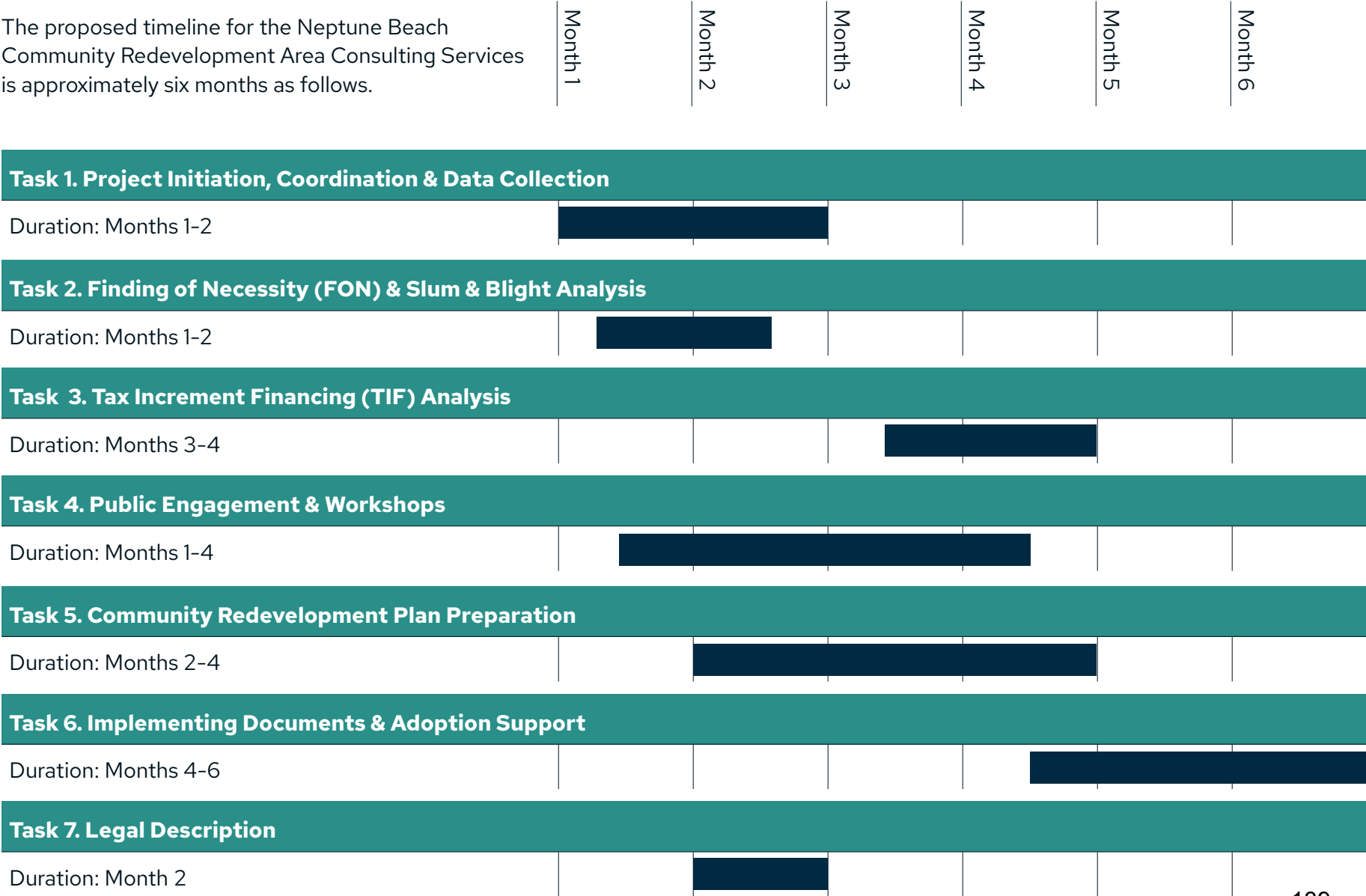


Project Example: West City FON & CRP Plan



TIMELINE

The proposed timeline for the Neptune Beach Community Redevelopment Area Consulting Services is approximately six months as follows.



B

Description of Redevelopment Projects





*Street view in Beaches Town Center
Neptune Beach, FL*

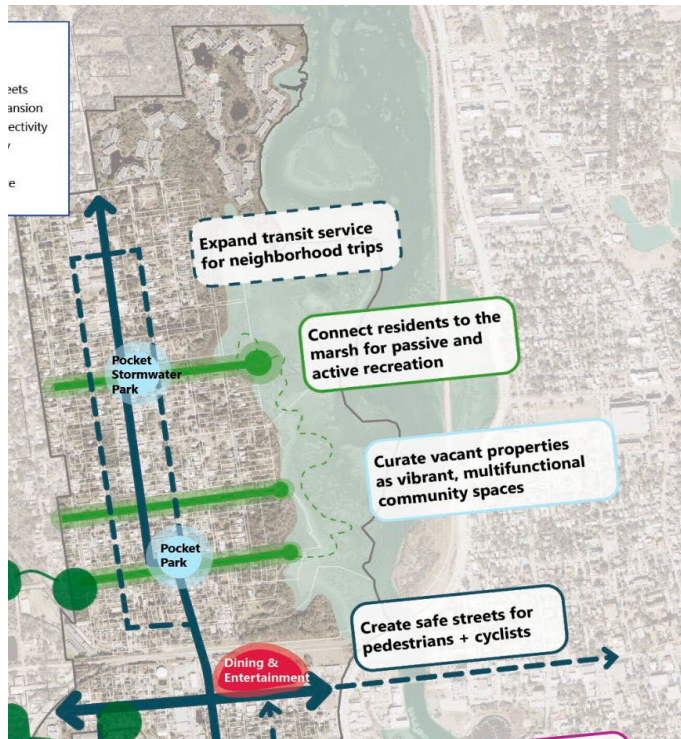
OUR STORY

West City FON Study & Community Redevelopment Plan

St. Augustine, FL

11/2023 - 10/2024

Inspire is worked with the St. Augustine Community Redevelopment Agency to establish a third Community Redevelopment Area within the City's incorporated limits. The West City CRA is located west of two existing Redevelopment areas and adjacent to the boundaries of the City of St. Augustine and the St. John's County unincorporated area. Inspire prepared a Finding of Necessity (FON) to establish the West City CRA, working with CRA staff on community engagement and prepared the West City Community Redevelopment Area Plan.



Client Information

City of St. Augustine, FL
75 King Street
St. Augustine, FL 32084

Key Services

Finding of Necessity (FON)
Redevelopment Planning
Community Engagement

Key Personnel

Erik Bredfeldt
George Kramer
Lainie Jones

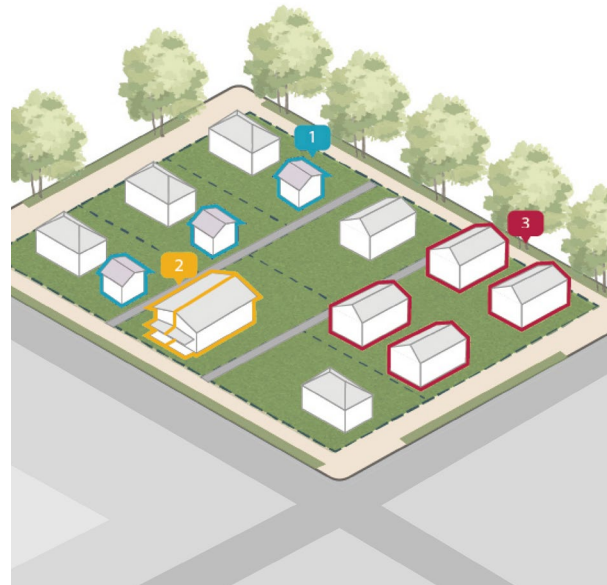
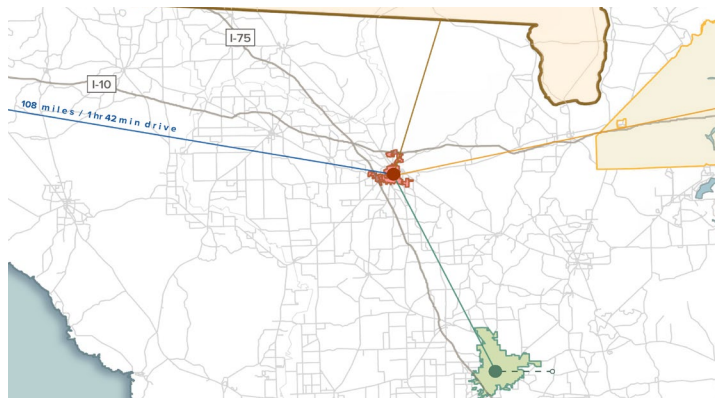
FON Study & Community Redevelopment Plan Update

Lake City, FL

05/2025 - 05/2026

Inspire is working with Lake City, FL to update its existing Community Redevelopment Plan. Initially, this effort analyzed prospective expansion of the established CRA boundaries, so an FON was conducted to assess expansion area compliance with State statutes regarding slum/blight. Although it was determined that the prospective expansion area would meet the State statutes test, Lake City staff determined that they would rather update the CRA's existing boundaries and move forward in that manner. Inspire has been working with staff to reconstitute the existing Plan based upon current community priorities and data analysis.

Spanning 655 acres that surround Lake De Soto, the CRA was established in 1981 to address growing redevelopment needs in the downtown Central Business District. Its first Master Plan was formulated in 1989 and was most recently updated in 2011; the most recent Plan envisioned the area as a "quaint but vibrant center that provides a 'college campus' environment," offering residents strong local education opportunities while balancing urban amenities, employment, and small-town charm.



Client Information

City of Lake City, FL
205 N. Marion Avenue
Lake City, FL 32055

Key Services

Finding of Necessity (FON)
Redevelopment Planning
Community Engagement

Key Personnel

Erik Bredfeldt
Julia Clark
Alex Kozela

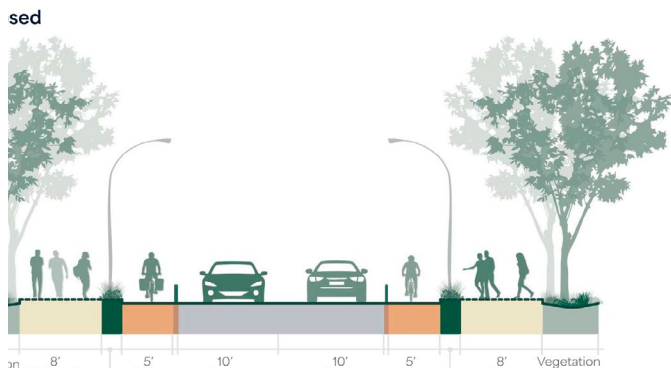
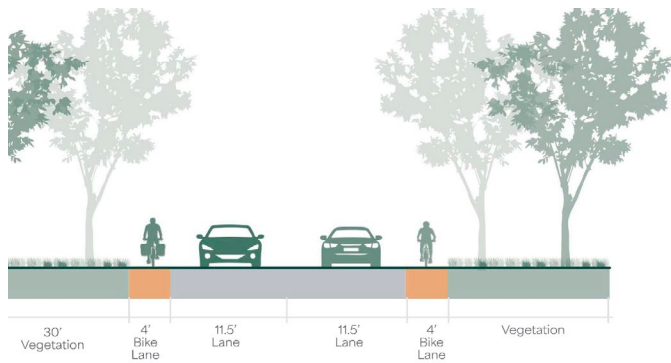
FON Study & Community Redevelopment Plan Update

Live Oak, FL

09/2025 – 06/2026

Live Oak hired Inspire to assess feasibility of expanding its CRA into areas of the city that have strong need for revitalization and investment but had been overlooked during the original establishment. Detailed GIS analysis highlighted major concerns with housing conditions, deteriorated commercial and industrial buildings, and land that has been sitting vacant for decades. Based on success of the FON, Live Oak chose to continue working with Inspire to officially extend the life of the CRA and develop a robust Community Redevelopment Plan update.

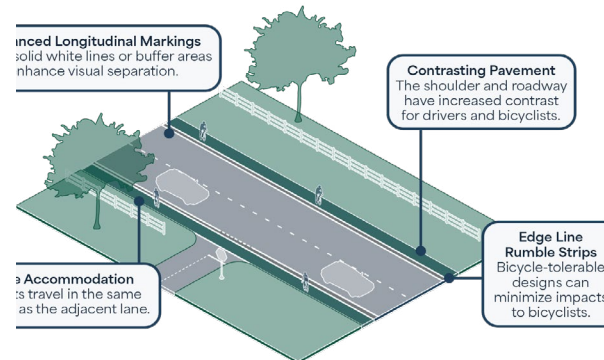
The Plan update process is ongoing, involving an in-depth analysis of the city's physical, regulatory, and socioeconomic environment and investigations of potential catalyst sites. Coordination of a series of short- and long-term capital improvement needs aim to position the City for reinvestment in its blighted housing and commercial building stock, improve mobility, and boost a unified community identity that appeals to tourists and residents alike.



Shoulder

Paved shoulders on the edge of roadways can be enhanced to serve as a functional space for bicyclists and pedestrians to travel in the absence of other facilities with more separation.

Enhanced Longitudinal Markings
Solid white lines or buffer areas enhance visual separation.



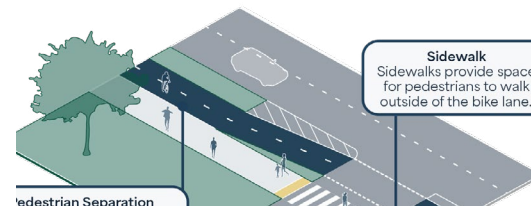
Accommodation
Bicyclists travel in the same as the adjacent lane.

Contrasting Pavement
The shoulder and roadway have increased contrast for drivers and bicyclists.

Edge Line Rumble Strips
Bicycle-tolerable designs can minimize impacts to bicyclists.

Separated Bike Lane

A separated bike lane is a facility for exclusive use by bicyclists that is located within or directly adjacent to the roadway and is physically separated from motor vehicle traffic with a vertical element.



Sidewalk
Sidewalks provide space for pedestrians to walk outside of the bike lane.

Client Information

City of Live Oak, FL
101 White Ave SE
Live Oak, FL 32064

Key Services

Finding of Necessity (FON)
Redevelopment Planning
Community Engagement
Urban Planning
Graphic Design
Visualization

Key Personnel

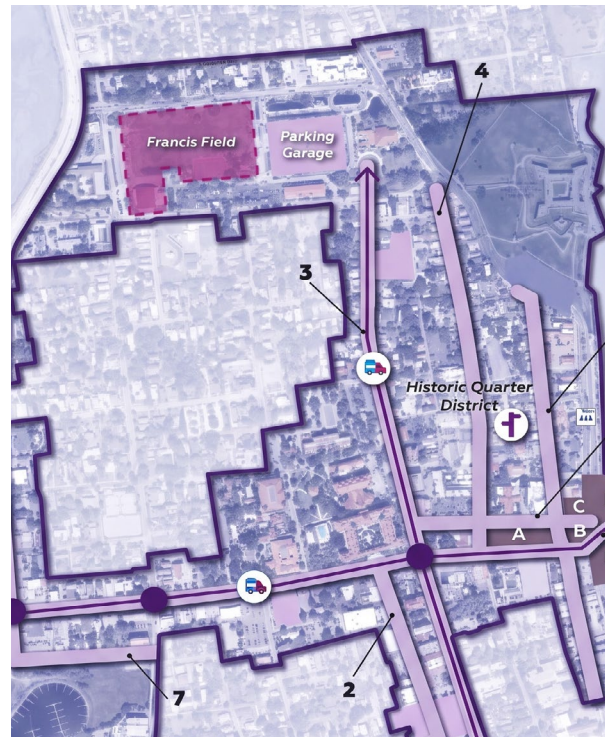
Megan Barrow
Erik Bredfeldt
George Kramer

Community Redevelopment Plan Update (Downtown)

St. Augustine, FL

01/2022 - 11/2023

America’s oldest City is entering a new phase in its storied history with significant renovations planned for King Street and a re-energized downtown experiencing renewed private sector investment. As a strategic advisor to the City, Inspire prepared an update to the City’s Historic Area Community Redevelopment Plan that identified redevelopment strategies, public realm investments, and redevelopment programming to enable the City to realize its long-sought redevelopment goals.



Client Information

City of St. Augustine, FL
75 King Street
St. Augustine, FL 32084

Key Services

Redevelopment Planning
Community Engagement
Landscape Architecture

Key Personnel

Erik Bredfeldt
Lainie Jones

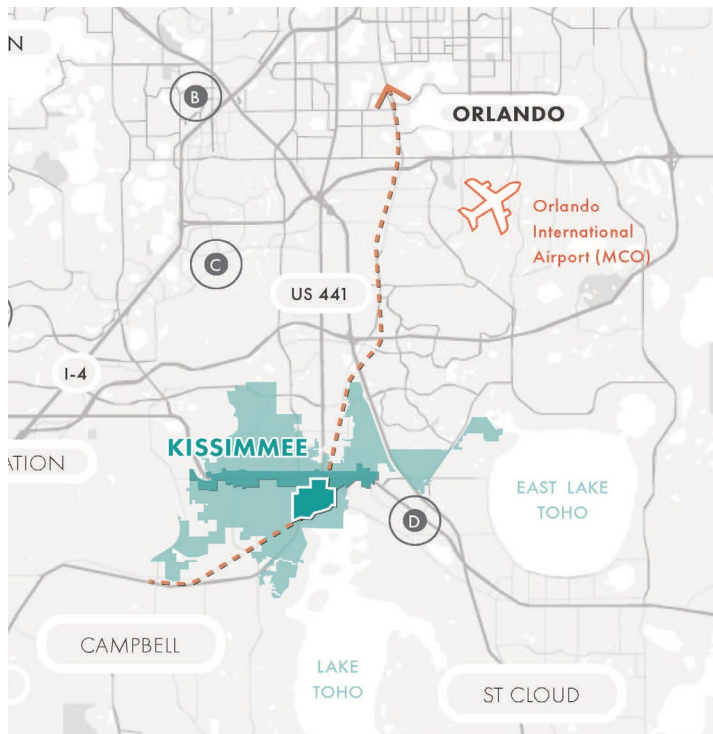
Downtown Community Redevelopment Plan

Kissimmee, FL

06/2025 – 08/2025

Inspire Placemaking partnered with the City of Kissimmee to update the Downtown Community Redevelopment Plan, creating a community-driven vision to revitalize the historic core. Facing decades of disinvestment, fragmented mobility, and underutilized sites, the CRA sought to reposition Downtown as a vibrant lakeside destination. Inspire led workshops, listening sessions, and stakeholder interviews to identify needs around safety, housing, economic vitality, and connectivity.

The updated Four Point Action Plan focuses on reinvigorating neighborhoods, improving mobility and wayfinding, activating sites, enhancing public safety, and supporting cultural and recreational assets, all while leveraging Kissimmee’s regional strengths. The project shows how Inspire helps cities turn local challenges into place-based solutions that foster growth, community identity, and long-term resilience.



Client Information

City of Kissimmee, FL
101 Church Street
Kissimmee, FL 34741

Key Services

Redevelopment Planning
Community Engagement
Urban Planning
Graphic Design
Visualization

Key Personnel

George Kramer
Megan Barrow
Sydney Pendergrass

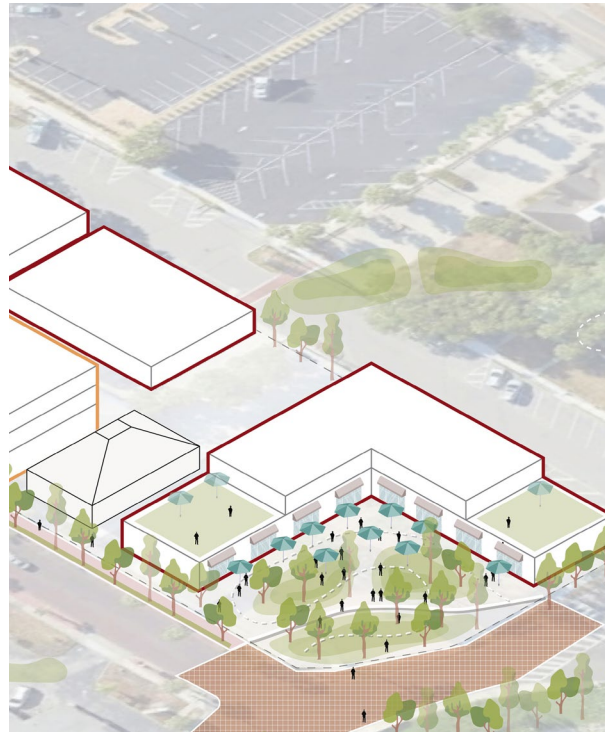
Downtown Master Plan

Tarpon Springs, FL

4/2025 – Ongoing

The City of Tarpon Springs initially sought to update its Downtown CRA Plan. Due to concerns with the existing CRA framework in Pinellas County, staff and Inspire shifted the effort to consolidating several key planning documents—including the Downtown CRA Plan, Sponge Docks Plan, Greektown Plan, and Transect Code—into a comprehensive Downtown Master Plan framework that could guide a future CRA update.

Working closely with economic development and planning staff, Inspire developed a project-oriented, implementation-focused plan that identified catalyst sites and emphasized aesthetics, land use, dimensional considerations, and resiliency given the area’s coastal environment. Inspire also reviewed and provided recommendations on the Form-Based Code’s transect provisions, which led the City to add a code rewrite component to the project.



Client Information

City of Tarpon Springs, FL
324 E. Pine Street
Tarpon Springs, FL 34689

Key Services

Plan Consolidation
Urban Design
Catalyst Site Analysis
Market Analysis
Code Provision
Recommendations

Key Personnel

Erik Bredfeldt
Viviana Castro
Julia Clark
Elena Oertel

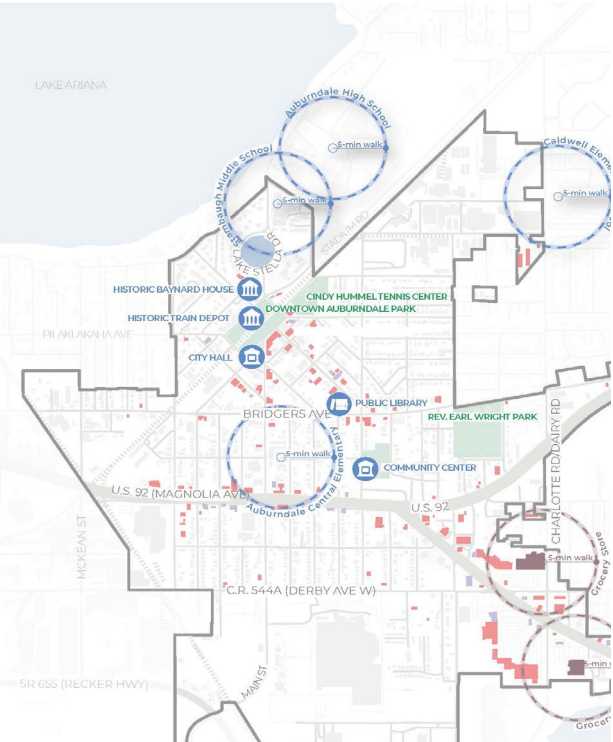
Community Redevelopment Plan Update

Auburndale, FL

07/2025 – 11/2025

Inspire guided the city in a major update of the Auburndale Community Redevelopment Plan, modernizing the CRA’s 30-year-old strategies to more effectively eliminate conditions of blight and achieve the goal of a vibrant, historic downtown destination by 2052. The effort included aligning its action plan with the latest economic development and transportation best practices, as well as ensuring the strategies meet ever-changing state law and are set up to ease partnerships with FDOT and other key governmental agencies.

The resulting update met the challenge of modernizing Auburndale’s approach by reframing redevelopment around leveraging its identity and regional assets as a recreation center, expanding housing opportunities, enhancing mobility and connectivity, and activating key redevelopment sites.



Client Information

City of Auburndale, FL
1 Bobby Green Plaza
Auburndale, FL 33823

Key Services

Redevelopment Planning
Community Engagement
Urban Planning
Graphic Design
Visualization

Key Personnel

Megan Barrow
George Kramer
Viviana Castro

Village Master Plan

Jacksonville, FL

11/2024 – Ongoing

Haskell worked with the Ortega Neighborhood Association (ONA) in partnership with the City of Jacksonville to develop a strategic plan that preserves the historic character of Ortega—a century-old garden suburb in Jacksonville, FL - addressing redevelopment opportunities and challenges. The plan included a two-phased approach designed to achieve ONA’s goals and provide a clear, actionable roadmap for revitalizing the neighborhood’s village core. The initial phase laid the groundwork by combining historical analysis, stakeholder engagement, and conceptual planning.

The primary focus was to identify current land use and transportation challenges, collecting community input, and creating preliminary recommendations to guide future planning. A subsequent phase is getting underway that builds on these initial findings. The final step is to develop a comprehensive Village Master Plan, including an illustrative final design and detailed strategies for implementation - including infrastructure improvements and cost estimates - to support desired infill and redevelopment.



Client Information

City of Jacksonville, FL

Key Services

- Master Planning
- Site Feasibility
- Community Engagement

Key Personnel

Fred Jones



C

Cost Proposal



*Wooden Boardwalk leading to
Neptune Beach, FL*

OUR
PROMISE

COST PROPOSAL

Project Task	Cost
Task 1. Project Initiation, Coordination & Data Collection	\$ 27,500
Task 2. Finding of Necessity (FON) Analysis and Adoption Support	\$ 28,100
Task 3. Public Engagement & Workshops	\$ 46,200
Task 4. Community Redevelopment Plan Preparation & TIF Analysis	\$ 74,500
Task 5. Refinement & Adoption	\$ 12,300
Task 6. Legal Description	\$ 10,000
Total	\$ 198,600

Job Classification	Rates / Hr
Principal/Director	\$250 - \$400
Project Manager	\$175 - \$250
Deputy Project Manager	\$165 - \$195
Senior Landscape Architect/Senior Planner	\$165 - \$200
Senior Graphic Designer	\$135 - \$185
Landscape Architect/ Urban Designer/ Planner	\$110 - \$165
Landscape Designer/Planning Technician	\$90 - \$130
Graphic Designer	\$75 - \$100
Professional Interns	\$75 - \$90
Administrative	\$55 - \$85
Project Advisor (Haskell)	\$272.90
Communications/Public Relations Specialist (Haskell)	\$174.27
Senior Planner (Haskell)	\$157.21
Design Associate II-Arch (Haskell)	\$136.24

D

Licenses/ Certifications/ Insurance



*Neptune Beach City Hall
Neptune Beach, FL*



OUR STATUS

SUNBIZ CERTIFICATE

State of Florida Department of State

I certify from the records of this office that INSPIRE PLACEMAKING COLLECTIVE, INC. is a corporation organized under the laws of the State of Florida, filed on December 27, 2022, effective October 27, 2022.


The document number of this corporation is P22000094175.

I further certify that said corporation has paid all fees due this office through December 31, 2026 and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Twenty-sixth day of January,
2026*




Secretary of State

Tracking Number: 2195231849CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

FLORIDA DEPARTMENT OF STATE

DIVISION OF CORPORATIONS



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Detail by Entity Name

Foreign Profit Corporation
THE HASKELL COMPANY

Cross Reference Name
THE HASKELL COMPANY

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Principal Address

THE HASKELL COMPANY
701 SAN MARCO BLVD. STE. 1400
JACKSONVILLE, FL 32207

Changed: 03/17/2026

Mailing Address

THE HASKELL COMPANY
701 SAN MARCO BLVD. STE. 1400
JACKSONVILLE, FL 32207

Changed: 03/17/2026

Registered Agent Name & Address

COGENCY GLOBAL INC.
115 North Calhoun St.
Suite 4
Tallahassee, FL 32301

Name Changed: 04/29/2010

TEAM LICENSES

The American Institute of Certified Planners

The Professional Institute of the American Planning Association

hereby qualifies

George Malcolm Kramer

as a member
with all the benefits
of a Certified Planner and
responsibility to the
AICP Code of Ethics
and Professional Conduct.

Certified Planner Number: **020533**

February 17, 2006

PRESIDENT

EXECUTIVE DIRECTOR

This certificate hereby qualifies

Megan Barrow

as a member with all the benefits of a Certified Planner and a commitment to the AICP Code of Ethics and Professional Conduct.

Certified Planner Number: 53902

Joel Albizo, FASAE, CPA
Chief Executive Director

Erin Perdu, AICP
President



This certificate hereby qualifies

Julia Clark

as a member with all the benefits of a AICP Candidate and a commitment to the AICP Code of Ethics and Professional Conduct.

Joel Albizo, FASAE, CPA
Chief Executive Director

Erin Perdu, AICP
President



This certificate hereby qualifies

Erik Bredfeldt

as a member with all the benefits of a Certified Planner and a commitment to the AICP Code of Ethics and Professional Conduct.

Certified Planner Number: 011971

Joel Albizo, FASAE, CPA
Chief Executive Director

Mitchell J. Silver, FASCP
President



Verify: <https://www.credly.com/go/8TQCHpsv>

The American Institute of Certified Planners

The Professional Institute of the American Planning Association

hereby qualifies

Frederick N. Jones

as a member with all the benefits of a Certified Planner and responsibility to the AICP Code of Ethics and Professional Conduct.

Certified Planner Number: 020918

September 14, 2006

Signature of Joe Schmitt

PRESIDENT

Signature of Paul Farn

EXECUTIVE DIRECTOR



This certificate hereby qualifies

Elena Oertel

as a member with all the benefits of a Certified Planner and a commitment to the AICP Code of Ethics and Professional Conduct.

Certified Planner Number: 54700

Signature of Joel Albizo, FASAE, CA
Chief Executive Director

Signature of Erin Perdu, AICP
President



American Institute of Certified Planners
Creating Great Communities for All

Transportation Professional Certification Board, Inc.

certifies that

Frederick Norman Jones

has met all of the requirements established by the Certification Board to use the title of

Road Safety Professional

unless withdrawn by the Certification Board and subject to the provisions for renewal.

Certificate number 295 issued in Washington, DC, U.S.A

3/20/23

Signature of Joseph C. Balbus
Joseph C. Balbus
Chair



Signature of Jeffrey F. Piniati
Jeffrey F. Piniati
Executive Director



This certificate hereby qualifies

Jeremy Griffith

as a member with all the benefits of a Certified Planner and a commitment to the AICP Code of Ethics and Professional Conduct.

Certified Planner Number: 36608

Signature of Joel Albizo, FASAE, CA
Chief Executive Director

Signature of Erin Perdu, AICP
President



American Institute of Certified Planners
Creating Great Communities for All

This certificate hereby qualifies

Jose Fernandez

as a member with all the benefits of a AICP Candidate and a commitment to the AICP Code of Ethics and Professional Conduct.



Joel Albizo
Joel Albizo, FASAE, CAE
Chief Executive Director

Erin Perdu
Erin Perdu, AICP
President



This certificate hereby qualifies

Brandie L. Miklus, AICP

as a member with all the benefits of a Certified Planner and a commitment to the AICP Code of Ethics and Professional Conduct.

Certified Planner Number: 026043

Paul Farmer
Paul Farmer, FASAE
Chief Executive Officer

Anna Brumby
Anna Brumby, AICP
President



Ron DeSantis, Governor
Melanie S. Griffin, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF LANDSCAPE ARCHITECTURE
THE LANDSCAPE ARCHITECT HEREIN HAS REGISTERED UNDER THE PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

CASTRO, VIVIANA
4767 NEW BROAD STREET
ORLANDO FL 32814

LICENSE NUMBER: LA6667568
EXPIRATION DATE: NOVEMBER 30, 2027
Always verify licenses online at MyFloridaLicense.com

ISSUED: 12/08/2025
Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

This certificate hereby qualifies

Mikhail Alert, AICP

as a member with all the benefits of a Certified Planner and a commitment to the AICP Code of Ethics and Professional Conduct.

Certified Planner Number: 31297

James M. Drinan
James M. Drinan, JD
Executive Director

Deborah Lawlor
Deborah Lawlor, FAICP, PP
President



INSURANCE CERTIFICATES

ACORD INSPPLA-01 **STHOMPSON** DATE (MM/DD/YYYY) 4/15/2026

CERTIFICATE OF LIABILITY INSURANCE

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: JCJ Insurance Agency, LLC
2208 Hillcrest Street
Orlando, FL 32803

CONTACT: PHONE (AC, No, Ext): (321) 445-1117 FAX (AC, No): (321) 445-1076
E-MAIL: certs@cj-insurance.com
ADDRESS: INSURER(S) AFFORDING COVERAGE NAIC #
INSURER A: Hartford Underwriters Ins. Co. 30104
INSURER B: Beazley America Insurance Company, Inc. 16510
INSURER C:
INSURER D:
INSURER E:
INSURER F:

INSURED: Inspire Placemaking Collective, Inc.
4767 New Broad Street
Orlando, FL 32814

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	X	21 SBA AV4H7E	1/1/2026	1/1/2027	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPOD AGG \$ 2,000,000
GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						
A	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS NON-OWNED <input checked="" type="checkbox"/>	X	21 SBA AV4H7E	1/1/2026	1/1/2027	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	UMBRELLA LIAB EXCESS LIAB <input checked="" type="checkbox"/> OCCUR CLAIMS-MADE <input checked="" type="checkbox"/> RETENTION \$ 10,000	X	21 SBA AV4H7E	1/1/2026	1/1/2027	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in MI) Y/N N/A If yes, describe under DESCRIPTION OF OPERATIONS below						
B	Professional Liab		C38DAA250101	1/1/2026	1/1/2027	Per Claim 2,000,000
B	Professional Liab		C38DAA250101	1/1/2026	1/1/2027	Aggregate 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
City of Neptune Beach where required by written contract is an Additional Insured with respect to all policies (except Workers Compensation and Professional Liability). Coverages are primary & non-contributory. A Waiver of Subrogation for all policies applies when required by written contract. 30 Day Notice of Cancellation, except for 10 days for non-payment.

CERTIFICATE HOLDER City of Neptune Beach
116 First Street
Neptune Beach, FL 32266

CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE:

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ACORD **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY) 09/15/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: Marsh Affinity
a division of Marsh USA LLC.
PO BOX 14404
Des Moines, IA 50306-9688

CONTRACT NAME: Marsh Affinity
PHONE (AC, No, Ext): 800-743-8130 FAX (AC, No):
E-MAIL: ADPTotalSource@marsh.com
ADDRESS: INSURER(S) AFFORDING COVERAGE NAIC #
INSURER A: Illinois National Ins Co 23817
INSURER B:
INSURER C:
INSURER D:
INSURER E:
INSURER F:

INSURED: ADP TotalSource CO XXI, Inc.
5800 Windward Parkway
Alpharetta, GA 30005
Alternate Employer:
Inspire Placemaking Collective Inc
4767 NEW BROAD ST
Orlando, FL 328140000

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input type="checkbox"/> OCCUR					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPOD AGG \$
GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						
	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED <input type="checkbox"/>					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> OCCUR CLAIMS-MADE <input type="checkbox"/>					EACH OCCURRENCE \$ AGGREGATE \$
WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in MI) Y/N N/A If yes, describe under DESCRIPTION OF OPERATIONS below						
A	Professional Liab		WC 063528456 FL	07/01/2025	07/01/2026	PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ 2,000,000 E.L. DISEASE - EA EMPLOYEE \$ 2,000,000 E.L. DISEASE - POLICY LIMIT \$ 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
All worksite employees working for Inspire Placemaking Collective Inc paid under ADP TOTALSOURCE, INC.'s payroll, are covered under the above stated policy. Inspire Placemaking Collective Inc is an alternate employer under this policy. Proprietor/Partner/Executive Officer/Member are not excluded as long as they are in the ADPTS payroll or have completed the SEI Participation Addendum.

CERTIFICATE HOLDER Inspire Placemaking Collective Inc
4767 NEW BROAD ST
Orlando, FL 328140000

CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE:

ACORD 25 (2016/03) © 1988-2015 ACORD CORPORATION. All rights reserved.
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Attachment Code: D600403 Master ID: 1397254, Certificate ID: 13387705

		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY)	3/19/2026	5/30/2025	
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. IF SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>							
PRODUCER Lockton Companies, LLC 444 W. 47th St., Ste. 900 Kansas City MO 64112-1906 (816) 960-9000 kcasu@lockton.com				CONTRACT NAME PHONE (Ac, Ho, Ext) FAX (Ac, Ext) E-MAIL ADDRESS			
INSURED 1397254 THE HASKELL COMPANY 701 SAN MARCO BLVD, SUITE 1400 JACKSONVILLE FL 32207				INSURER(S) AFFORDING COVERAGE INSURER A: Arch Insurance Company 11150 INSURER B: XL Specialty Insurance Company 37885 INSURER C: Berkley Assurance Company 39462 INSURER D: Continental Casualty Company 20443 INSURER E: INSURER F:			
COVERAGES		CERTIFICATE NUMBER: 13387705		REVISION NUMBER: XXXXXXXX			
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INBR LTR	TYPE OF INSURANCE	ADOL INSD	INSD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> * SEE BELOW FOR STOP GAP <input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER	N	N	41PSG8983303	6/1/2025	6/1/2026	EACH OCCURRENCE \$ 5,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 2,000,000 MED EXP (Any one person) \$ 15,000 PERSONAL & ADV INJURY \$ 5,000,000 GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COM/OP AGG \$ 10,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS ONLY	N	N	41PSG8983303	6/1/2025	6/1/2026	COVERED SINGLE LIMIT (Per accident) \$ 2,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input checked="" type="checkbox"/> CLAIMS-MADE DED: RETENTION \$	N	N	US00075527L25A	6/1/2025	6/1/2026	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 DED: RETENTION \$ XXXXXXXX
A	WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe below DESCRIPTION OF OPERATIONS below	N	N/A	44WC18983403 (AOS)	6/1/2025	6/1/2026	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> GEN-ERAL E.L. EACH ACCIDENT \$ 5,000,000 E.L. DISEASE - EA EMPLOYEE \$ 5,000,000 E.L. DISEASE - POLICY LIMIT \$ 5,000,000
C	CONTRACT. EQUIP. INCL. L/R POLL. PROF.	N	N	8018389628	3/19/2025	3/19/2026	\$500K LIMIT PER ITEM: \$5K DED; 2.5% MIN \$25K CRANE DED
D	CONTRACT. EQUIP. INCL. L/R POLL. PROF.	N	N	PCAB-5027974-0623	6/1/2025	6/1/2026	\$100K DED; 2.5% MIN \$25K CRANE DED
DESCRIPTION OF OPERATIONS (LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)) [THE GENERAL LIABILITY POLICY INCLUDES STOP GAP EL \$1,000,000/\$1,000,000/\$1,000,000 FOR ND, OH, WA, WY]							
CERTIFICATE HOLDER				CANCELLATION See Attachment			
13387705 Evidence of Insurance				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 			

THE HASKELL COMPANY; 1397254



13387705
Evidence of Insurance

Dear Valued Client:

In our continuing effort to provide timely certificate delivery, Lockton Companies is utilizing paperless delivery of Certificates of Insurance. To ensure electronic delivery for future renewals of this certificate, we need your email address. Please contact us via the email below and reference Certificate ID: **13387705**. **You must reference this Certificate ID number in order for us to complete this process.**

- Certificate ID: 13387705
- Email: kcasu@lockton.com
- Subject Line: ASU E-Delivery

Signing up for this will **NOT** sign you up for any solicitation emails - your email will only be used to forward updated or renewal certificates direct from Lockton. The email you receive will look like this:



If you received this letter with a cert via email, no further action is necessary on your part.

If you no longer need this certificate, please contact us at the email address above, reference the Holder ID number and use this subject line: "Certificate Removal"

NOTE: Please do NOT send certificate requests or other insurance inquiries to the email inbox above.

Thank you for your cooperation.

Lockton Companies
Account Services Unit

E

References





*Aerial View of Residential
Area and Shoreline
Neptune Beach, FL*

OUR LEGACY

PROJECT REFERENCES

01

City of St. Augustine, FL

West City Finding of Necessity Study & Community Redevelopment Plan

Historic Community Redevelopment Plan Update Downtwon

Jaime D. Perkins, CRA Administrator
904.209.4254 (Office)
jperkins@citystaug.com
75 King Street
St. Augustine, FL 32085

02

City of Live Oak, FL

Finding Of Necessity Study & Community Redevelopment Plan Update

Nicholas Frigiola, CRA Director
386.362.2276 (Office)
nfrigiola@cityofliveoak.org
101 White Ave SE
Live Oak, FL 32064

03

City of Tarpon Springs, FL

Downtown Master Plan

Renea Vincent, Planning Director
727.938.3711 ext. 2402 (Office)
rvincent@ctsfl.us
324 E. Pine Street
Tarpon Springs, FL 34689

01



April 21, 2026

Catherine Ponson, CMC, FCPC
 City of Neptune Beach
 Attn: City Clerk's Office – RFP #2026-02
 116 First Street
 Neptune Beach, FL 32266

Dear Members of the Selection Committee:

Please accept this letter as a strong reference for Inspire Placemaking Collective, Inc. (Inspire) in your evaluation of firms for Community Redevelopment Area Consulting Services. Since 2015, the Inspire team has served the City of St. Augustine on a variety of projects including city-wide mobility planning, complete street/streetscape projects, a Finding of Necessity study, and two Community Redevelopment Plans.

I understand that the City of Neptune Beach is seeking a firm to conduct both a Finding of Necessity study and the creation of a Community Redevelopment Plan. In 2023, I retained Inspire to perform that same scope of work for the establishment of the West City Community Redevelopment Area (WCCRA). Not only was the Finding of Necessity Study successfully adopted, but it also received a **Roy F. Kenzie Award, in the Best Planning Studies category, from the Florida Redevelopment Association in 2024**. The subsequent West City Community Redevelopment Plan was completed and unanimously adopted in 2025.

Inspire offers a highly qualified team of planners and designers with extensive experience in redevelopment planning, community engagement, design, and Tax Increment Financing (TIF) strategies for implementation. Their team possesses a strong understanding of the requirements for establishing and maintaining Community Redevelopment Agencies in accordance with Florida Statutes, Chapter 163. Community engagement has been a cornerstone of Inspire's work on behalf of the City, with approaches that are inclusive, innovative, and effective. Their designers bring both expertise and creativity, delivering ideas that are not only compelling but also practical and achievable. Importantly, implementation remains central to Inspire's planning approach. By utilizing accurate TIF projections, their team prioritizes projects that can generate near-term revenue while positioning the city for long-term success.

Should you have any questions regarding my reference letter you may reach me on 904.209.4254. I wish you the best of luck during your evaluation process.

Very Respectfully Submitted,

A handwritten signature in blue ink that reads "Jaime D. Perkins".

Jaime D. Perkins, MPA
 Director, Community Services

CITY OF LIVE OAK
Community Redevelopment Agency
Live Oak, Florida

[04/25/26]

Re: Letter of Recommendation

To whom it may concern,

I am pleased to provide this letter of recommendation for Inspire Placemaking Collective, Inc., based on my experience working with their team in support of the City of Live Oak's redevelopment efforts, including creating a Finding of Necessity (FON) and Community Redevelopment Plan update (CRA).

Inspire has a strong command of Florida's redevelopment framework, including the technical and legal requirements for state compliance. Their understanding of economic redevelopment, land use, and implementation strategies in varying contexts allows them to deliver work that is genuinely useful for small communities like ours that are working to achieve long-term revitalization goals.

What stands out most is their professionalism and responsiveness. Inspire is collaborative, thoughtful, and easy to work with, and they take the time to understand a community's unique challenges and opportunities. Their commitment to meaningful engagement with staff and stakeholders reflects a level of care and integrity that is essential to successful redevelopment planning.

I have already recommended Inspire Placemaking's services by word of mouth to colleagues and superiors, and I am happy to do so again through this letter. Based on my experience, I am confident in their ability to successfully complete a Finding of Necessity and CRA Plan, and I would recommend them without hesitation.

Sincerely,

Nicholas Frigiola
CRA Director
City of Live Oak





**CITY OF TARPON SPRINGS
PLANNING & ZONING DEPARTMENT**

324 East Pine Street
P.O. Box 5004
Tarpon Springs, Florida 34689
(727) 942-5611

April 23, 2026

Re: Letter of Recommendation

To whom it may concern,

The City of Tarpon Springs partnered with Inspire Placemaking Collective, Inc. to develop a new plan, The Place to Be: by form, function, and design, that was intended to consolidate several past, overlapping planning efforts and serve as the downtown master plan. As this project developed and due to our satisfaction with Inspire, we expanded the scope of work to include drafting a new form based code for the study area.

Inspire was selected due to their vast knowledge of redevelopment, downtown planning, experience with Community Redevelopment Areas, and success in community engagement. The Inspire team displayed unparalleled professionalism throughout the planning process. They were highly responsive, prompt, and extremely adaptable throughout as the scope of the project continually shifted. The care and consideration taken when engaging and managing an impassioned community represents the highest integrity and best practices of our profession.

Every community is unique: Tarpon Springs is demonstrably different. Our citizens, elected officials, and staff take pride in participating in the planning process and appreciate clear, effective communication and engagement. Inspire excelled in this area and demonstrated deep care for the community by continually adapting the plan in order to provide the best product possible.

Based on our experience, I look forward to working with Inspire on future planning efforts and would highly recommend their services. They went above and beyond what was required and expected, in a field (and a city) where expectations are always high and everchanging.

Respectfully,

Allie Keen, AICP
Planning Director, Interim

F

Geographical Proximity



*Restaurant on First Street
(in the Heart of Beaches
Town Center)
Neptune Beach, FL*

OUR PROXIMITY



PROXIMITY

Inspire Placemaking Collective, Inc. is proud to partner with Haskell for this project, offering a strategic blend of regional expertise and local presence. While our Inspire headquarters in Orlando and our Savannah office are both approximately 145-150 miles (a 2 hours and 20 minute drive) from Neptune Beach, our team is fully committed to maintaining a seamless project schedule. To ensure immediate responsiveness, we are leveraging Haskell's Jacksonville office, located just 24 miles (30 minutes) from the project site. Regardless of physical distance, the Inspire team is dedicated to meeting all project milestones and exceeding delivery expectations.

Inspire Headquarters:

4767 New Broad Street, Orlando, FL 32814

Inspire Savannah, GA Office:

119 Martin Luther King Jr Blvd, Savannah, GA 31401

Haskell Office Location:

701 San Marco Blvd, Ste 1400, Jacksonville, FL 32207





G

Required Forms



*Shorelines Gift Shop
Neptune Beach, FL*



OUR METHOD

EXHIBIT "B"



CITY OF NEPTUNE BEACH, FLORIDA SWORN STATEMENT UNDER F.S. SECTION 287.133(3)(A), ON PUBLIC ENTITY CRIMES

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

1. This sworn statement is submitted with Bid, Qualifications, Proposal or Contract for _____
City of Neptune Beach, FL.
2. This sworn statement is submitted by (entity) Inspire Placemaking Collective, Inc. whose business address is 4767 New Broad Street, Orlando, FL 32814 and (if applicable) Federal Employer Identification Number (FEIN) is 92-1495717 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)
3. My name is George Kramer and my relationship to the entity named above is President.
4. I understand that a "public entity crime" as defined in Paragraph 287.133(a)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or any agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in paragraph 287.133(a)(b), Florida Statutes, means finding of guilt or a conviction of a public entity crime with or without an adjudication of guilt, in any federal or state trial court of records relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
 1. A predecessor or successor of a person convicted of a public entity crime; or
 2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The City of Neptune Beach, Florida ownership by one of shares constituting a controlling income among persons when not for fair interest in another person, or a pooling of equipment or income among persons when not for fair market value under a length

agreement, shall be a prima facie case that one person controls another person. A person who was knowingly convicted of a public entity crime, in Florida during the preceding thirty six (36) months shall be considered an affiliate.

- 7. I understand that a "person" as defined in Paragraph 287.133(1)(c), Florida Statutes, means any natural person or entity organized under the laws of the state or of the United States with the legal power to enter into a binding contract for provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
- 8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies)

Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. (Please attach a copy of the final order.)

The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by, or pending with, the Department of General Services.)

[Signature] 4/28/26
Signature Date:

STATE OF FLORIDA
COUNTY OF Orange

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 28 day of April, 2026, and is personally known to me, or has provided _____ as identification.

Nancy A Pfaff
Notary Public
My Commission expires: 3/23/27

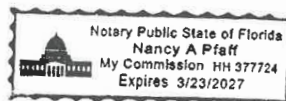


EXHIBIT "C"



DRUG-FREE WORKPLACE CERTIFICATION

The below-signed Proposer certifies that it has implemented a drug-free workplace program. In order to have a drug-free workplace, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or services a copy of the statement specified in paragraph 1.
4. In the statement in paragraph 1., notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee understands the terms of the statement and will notify the employer of any conviction of, or plea of nolo contendere to, any violation occurring in the workplace no later than five (5) working days after such conviction.
5. Impose a sanction on, or require fine satisfactory participation in drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign this statement, I Certify that this firm complies fully with the above drug-free workplace requirements.

COMPANY: Inspire Placemaking Collective, Inc.

CITY: Orlando STATE: FL ZIP CODE: 32814

TELEPHONE NUMBER(S): 407.917.0441

CELL PHONE: 407.202.8387 EMAIL: gkramer@inspireplacemaking.com

SIGNATURE: 

NAME (TYPED OR PRINTED): George Kramer TITLE: President

EXHIBIT "D"



E-VERIFY STATEMENT

Bid/Proposal/RFQ Number: RFP 2026-02

Project Description: Community Redevelopment Area Consulting Services

Vendor/Consultant acknowledges and agrees to the following:

Vendor/Consultant shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

- 1. All persons employed by the Vendor/Consultant during the term of the Contract to perform employment duties within Florida; and
- 2. All persons, including subcontractors, assigned by the Vendor/Consultant to perform work pursuant to the contract with the Department.

Company/Firm: Inspire Placemaking Collective, Inc.

Contact Name (Print): George Kramer

Authorized Signature: 

Title: President

Date: 4/28/26

EXHIBIT "E-1"



RESPONDENT'S CERTIFICATION

I have carefully examined the Request for Qualification (RFQ), the other related documents identified in the RFQ, and the following Addenda, receipt of all which is hereby acknowledged:

<u>Addendum No.</u>	<u>Addendum Date</u>		
1	4/15/2026	3	4/16/2026
2	4/16/2026		

1. I hereby propose to furnish the goods or services specified in the Request for Qualification. I agree that my qualification will remain firm for a period of 365 days in order to allow the City adequate time to evaluate the qualifications.
2. I certify that all information contained in this qualification is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to submit this qualification on behalf of the firm as its act and deed and that the firm is ready, willing and able to perform if awarded the contract.
3. The applicant certifies to the best of his/her knowledge and belief, that his/her principals:
 - a. Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency;
 - b. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, Local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or falsification or destruction of records, making false statements, or receiving stolen property;
 - c. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, Local) with commission of any of the offenses enumerated in paragraph 1.b of this certification; and
 - d. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, Local) terminated for cause or default.
4. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall submit an explanation to the City of Neptune Beach, City Manager.

I further certify, under oath, that this qualification is made without prior understanding, agreement, connection, discussion, or collusion with any other person, firm or corporation submitting a qualification for the same product or service; no officer, employee or agent of the City of Neptune Beach or any other proposer is interested in said qualification; and that the undersigned executed this Proposer's Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

Inspire Placemaking Collective, Inc.
 Name of Business
 George Kramer
 Name (Print)

 Signature
 4/23/26
 Date:

STATE OF FLORIDA
 COUNTY OF Orange

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 23 day of April, 2026, and is personally known to me, or has provided _____ as identification.

Notary Public
 My Commission expires: 3/23/27

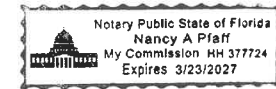


EXHIBIT “E-2”



CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION

TO BE COMPLETED BY ALL SUB-CONSULTANTS

Lower Tier Covered Transactions

1. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Company/Firm: The Haskell Company

Printed Name & Title: Fred Jones, Director of Planning

Authorized Signature: Jones, Fred Digitally signed by Jones, Fred
Date: 2026.04.19 13:50:41 -04'00'

Date: 4/17/2026