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June 26, 2023 | Request for Proposal #2023-32

Professional Services for City Fees, Rates, Methodologies and Assessments



INTEGRATED | UTILITY | SOLUTIONS

SCS ENGINEERS

Environmental Consultants and Contractors

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Tab

Transmittal Letter

TAB 1 TRANSMITTAL LETTER

SCS performs detailed research and operational planning, program analysis, and rate studies for cities across the country.

The City of North Port has requested a proposal to provide Professional Services for City Fees, Rates, Methodologies and Assessments as needed. The goal of your RFP is to identify qualified consultants that can be available to perform any or all the services described herein throughout the City. Additionally, the selected consultant should be able to develop rate structures that are equitable, easy to understand and bill, and are consistent with statutes and best practices.

You need the services of experts to perform your financial analyses and provide you with the financial solution you require for long-term financial sustainability, while meeting your operational goals. I (Vita Quinn) am your **Project Manager**. I am SCS' **National Expert on Rate Studies**, and lead our Management Services practice. I will lead all of the work on this project and remain committed as Project Manager throughout the project duration.

Stacey Demers will lead the analysis of user characteristics, operations, and capital needs. She performs research and operational planning, program analysis, and rate benchmarking studies for cities across the country.

Stacey and I will receive support from the other team members listed in this proposal and, to the extent required, can leverage **hundreds of other consultants available** for this work. We are proposing to provide all of the services requested in this proposal, as shown below:

1. Utilities User Fees
2. Utilities Miscellaneous Fees
3. Other Miscellaneous Fees
4. Water and Wastewater Capacity Fees
5. Road and Drainage District Fees
6. Solid Waste Fees
7. Fire District Fees
8. Rescue Services and Emergency Medical Services
9. Building Fees
10. Impact Fees
11. Park and Recreation Fees
12. Facility Rental Fees
13. Planning, Zoning and Development Review Fees

14. Police Fees
15. Business Tax Receipt
16. Construction Traffic Road Fees
17. Fleet Management Fees
18. Mobility Fees

Our goal is to combine our experience, customized models, and communication processes in a way that keeps you involved and informed, is efficient and cost-effective, and gets the results you require.

Vita Quinn and Stacey Demers are authorized to enter into and negotiate contracts with the City as required. If you have questions concerning any aspect of this proposal, please contact me at 386-546-7719 or VQuinn@scsengineers.com.

Sincerely,



Vita Quinn, MBA
Director of Management Services
SCS Engineers



Stacey Demers
Vice President
SCS Engineers



Approach to Project/Project Control/ Resources



TAB 2 APPROACH TO PROJECT/PROJECT CONTROLS/ RESOURCES

Our approach and experience on similar projects, performed by experts identified as key personnel, demonstrate that SCS is the right choice.

Background

The City of North Port, Sarasota County's most populous municipality and the 7th largest City in the State of Florida by geographic size, has about 78,000 residents and continues to see steady population growth. The City is located in the southern section of Sarasota County on Florida's Gulf Coast midway between Tampa and Naples and comprises about 104 square miles of area. The City has 70,608 platted residential lots, 813 miles of roads and 164 miles of man-made canals. The City currently serves over 25,233 water customers, 19,792 wastewater customers and 54 bulk residential and commercial reclaimed water customers.

The City provides public safety, recreational, public works, public utilities, planning, engineering, economic development, and general administrative services for its residents. The City recognizes the need to plan for the increased costs to serve its growing population while maintaining its level of service.

The City's funds include the General Fund, several districts (Road & Drainage, Fire Rescue, Solid Waste), Water & Sewer Utilities enterprise fund, an internal service fund, and various other capital and nonmajor funds. As charges for services are the majority of the City's revenue for both governmental and enterprise activities, the City recognizes the need to update these charges periodically, so as to ensure that they adequately recover the cost of these services.

The goals of the professional services requested are for the City to:

- Determine the adequacy of its current rates and fees to cover the cost of providing services, and
- Review/update its methodology to obtain the desired level of cost recovery while remaining consistent with laws, regulations, statutes, and rules that govern the collection of fees, rates, and charges by public entities.

SCS performs the full range of consulting services for municipal clients, developing financial sustainability solution, including **revenue sufficiency analysis**, rate studies, cost allocation, **assessment development**, benchmarking, and **fee analysis**. Our staff has the ability to offer an independent evaluation of fees and charges

that allow municipal entities to realize their financial goals while meeting their operational, capital, debt service coverage, and reserve requirements.

We excel at communicating the results of our analysis in public presentations and workshops with county commissions, city councils, authority boards, and citizen's advisory boards to gain acceptance of the recommended financial sustainability solutions.

SCS has developed an interactive modeling approach that allows input from the City as we develop financial solutions customized to your financial dynamics. The results are displayed in a simple format that allows for easy understanding and future updates. During the meetings with City staff, we project the models onto a monitor or viewing screen, and work with key staff to create financial solutions that allow the City to meet its financial goals and regulatory requirements while minimizing the impacts to its customers. The identified rates, fees, and assessments, projected cash flows, and assumptions are then presented in workbooks of detailed schedules.

Our Approach

Updating your charges for services begins with our suite of utility **rate and financial planning models** that we customize to reflect the City's available funds, budgeting and actual spending, customer information, and capital program. The models are designed to:

- Identify assumptions and variables
- Examine historical trends and performance
- Forecast financial requirements
- Test alternative what-if scenarios and/or methodologies
- Calculate cost of services
- Determine the sufficiency of current rates to recover the cost of services
- Design updated rates based on cost to provide services and influence behavior

Our detailed approach and planning tools will allow our project team to **work closely with City utility staff**, finance staff, and City Administration to develop and get support for a long-term financial plan. We will utilize our models in interactive work sessions with City staff to review what-if scenarios and develop strategies to implement a sustainable rate and financial plan.

While our financial models are tools to support decision-making, our added value is our client focus, industry experience, and ability that we leverage to identify innovative solutions to your problems.

Steps to a Successful Financial Study

There are several steps to calculating cost-of-service based rates. This section describes the ratemaking process and how we will work with the City to develop rates tailored to your system dynamics, diversion initiatives, and service levels. The steps also detail interaction with City staff, administration, elected officials, and the public that are required to facilitate the desired outcomes for your study.

Compile and Review Existing Information

We will begin our study by scheduling a **kickoff meeting** with our team and City staff to discuss key issues, near and **long-term goals**, and metrics that you consider to be most important to your financial performance. At this meeting we will also distribute our data request, **discuss the items required for our analysis**, and the platform we will use for data transfer.

We will establish who will be involved in the process, the **key members of our team and your key staff**, and discuss the **project schedule** for interactive work sessions with your staff, meetings with your Council, and final deliverables.

We will work with City staff to identify and obtain all information relevant to understanding your existing operations and costs for provision of service to customers. Once we start to receive the data, we will begin an in-depth review. We will also review any other data provided and remain in contact if we need clarification prior to our first interactive work session. Items we request may include:

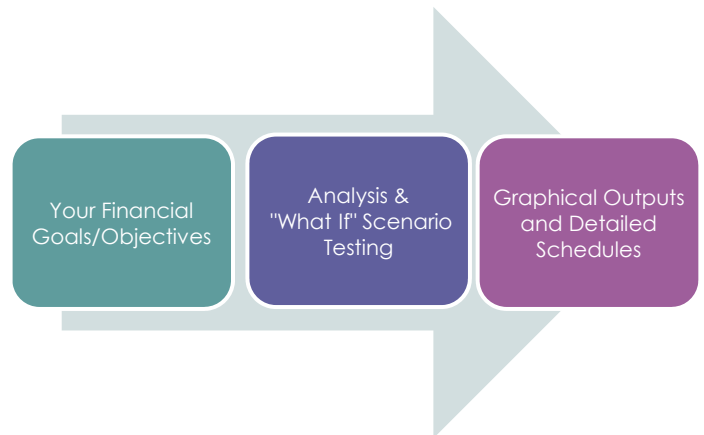
- Historical and current rates/fees/assessments, including miscellaneous or one-time fees
- Account/customer billing information and/or parcel data
- Customer service level / disposal characteristics
- Fund balances
- Historical and budgeted revenues and operating expenses
- Debt service schedules and coverage requirements
- Capital improvement plan and fleet/equipment inventory
- Current staffing and projected future hiring
- City ordinances and policies relevant to the analysis
- Legal and financial concerns and/or regulatory and policy restrictions



Revenue Sufficiency & Financial Requirements

For almost any financial study, the process begins with identifying the revenue requirement. SCS uses an interactive modeling approach that allows input from you as we develop **customized financial solutions**. To determine your financial requirements, we perform a revenue sufficiency analysis to determine the long-term sustainability of your revenues, including a long-term **financial management plan and associated plan of revenue adjustments**.

During meetings with your staff, we display the models and work with you to **test multiple “what if” scenarios** that consider your financial sensitivity to changes in various variables. For example, we can test the impact of changes to your capital program costs and timing, and the associated impact on operating expenses and staffing requirements. For each scenario considered, we identify the necessary revenue adjustments, including any borrowing that may be required, and the associated financial, fund balance, and customer impacts.



We will also evaluate capital funding alternatives, including cash funding, debt funding, grants, or any other financing alternatives the City is considering. The results are displayed in a simple, graphical format that allows for easy **comparison of scenarios**. Some of the steps in this process are detailed in the following sections.

Revenue Projection

We examine a **multi-year history** of revenues, billing history, budgeted revenue to actual receipts, **financial trends**, and financial policies that affect the revenues of the utility. We also consider **revenue optimization and revenue diversification strategies**. To project revenue from customer charges, we evaluate historical billing data, assessment rolls, revenues, and population growth to estimate future **growth projections** that will affect your rate revenues.

Expense Projection

To project your revenue requirements, we review your historical budgeted and executed operating expenses, all planned capital improvements and associated funding sources, existing debt service and coverage ratios, available and recommended operating, capital, and debt service reserves, and any financial policies and reserve requirements dictated by policies of the City. We also **consider your goals to address during the study**, such as cash reserve targets, operational changes, or hiring needs.

We study **changes in capital and labor costs** and how this will affect your expenses. Using cost escalators, we estimate your future expense increases and the nature of any expenses that may be contractual or one-time/temporary. As we tailor our model to your operations, we identify any other **issues or questions affecting financial performance to discuss with you** during our interactive meetings.

Capital Program Review

One of the largest expenditures driving the need for revenue is the cost of capital outlay required to meet **current and future service needs and regulatory requirements**. In addition, there are significant renewal and replacement cost requirements to **preserve the reliability and useful life of your infrastructure** and other assets. And implementing new programs often requires additional infrastructure, equipment, or other capital expense.

We perform a detailed review of your current capital program and the **anticipated sources of funds** available to pay for these projects. This discussion of funding is important to reducing the impact of capital on rates. Recognizing this, we will:

- Review the level of your budgeted capital spending vs needed capital investment,
- Consider the priority of individual items within your capital plan,
- Review all restricted and unrestricted funds available for projects,
- Discuss timing of project expenditures, and
- Consider external funding sources, such as grants or loans, that may mitigate rate impacts.

In meetings with City staff, we will review the level of capital or types of projects the City historically cash funds from revenues. We will evaluate the pros and cons of alternative capital funding practices, and financial considerations associated with leveraging debt financing.

We will consider whether the City could adapt its use of cash and debt funding to maximize available cash reserves, improve the long-term stability of rates, and limit risk. Working with you, we will develop a **recommended capital spending and funding plan** for the identified capital and future capital needs.

Financial Management Plan

Based on our analysis and interactions with staff, we now have a **forecast of your system growth and anticipated revenues under your current rates**. We also have a **projection of operations and maintenance** expenses, capital investment, debt service payments, and the resulting fund balances in each year of the projection period.

The final step is to review the scenarios the City may wish to consider for project timing and funding, policy changes, or sensitivity to changes in any of the assumptions used in the analysis and then **develop a long-term plan of rate adjustments** for each scenario. Working with you, we identify the scenario that best reflects your **anticipated and desired outcomes while minimizing impacts** to your residents.

This plan provides the revenue requirements used as the basis for updating your rates/fees/assessments.

Rate/Fee/Assessment Development

As required by the studies for which we are engaged, we will perform the following tasks:

Rate Structure Analysis

To begin a rate structure analysis, we examine the City's current rates/fees and identify any structural adjustments to consider in developing the City's new rates. We obtain historical billing data and/or property data and analyze current billing practices. The test year revenue requirement is based on the results of the revenue sufficiency analysis and we use this revenue requirement and the results of the billing data analysis in the development of an updated rate/fee structure. In developing this structure, we consider the cost of services provided, customer impacts, and the City's desire to incentivize customer behaviors.

During an interactive meeting with you, we calculate rates based on the current structure and recommended adjustments. We discuss the basis of the recommendations and test the sensitivity of the rate changes to various customer classes and demand characteristics. The goal is to develop a structure that will accurately reflect the dynamics of your operations while equitably distributing costs across your customer classes.

Impact Fees

Impact fees, often referred to as capacity charges or system development fees, are charges levied on new development to reimburse local governments for the capital costs of constructing public facilities required to provide service to that development. Impact fees are a mechanism for growth to pay its own way, thus minimizing the cost to existing residents for new or expanded facilities required to serve new development.

Impact fees are well-defined in Florida statutes and relevant case law has guided best practices. These case law determinations generally agree that a rational nexus must exist. The test is that:

1. There must be a reasonable connection between the need for additional facilities and the growth resulting from new development,
2. The fees charged must not exceed the proportionate share of the cost to support the development paying the fee, and
3. There must be a reasonable connection between the expenditure of the fees collected and the benefits received by the development paying the fees.

Additionally, the level of service paid for by these fees cannot be greater than the existing level of service in the system.

Much as in other forms of ratemaking, impact fees require determining the cost of development-related improvements and then equitably allocating those costs to the various types of new development.

As part of this process it is important to determine how much, if any, of the current system is available to serve growth and how much, if any, capital investment will be required to continue to do so. Several common approaches for calculating impact fees are:

- **Incremental Cost** – In communities that have limited existing capacity, specific costs for future improvements needed to serve new development are identified in a capital improvement program (CIP). The fee calculation is based on the identified cost and added capacity of the improvements.
- **System Buy-In** – This excess capacity approach is used for existing facilities that have been oversized and have excess capacity available. The fee calculation is based on the replacement cost of the system’s assets and existing system capacity available for new customers.
- **Hybrid** – This combined approach recognizes the use of existing capacity as well as future projects that will be required to serve growth. This approach is most appropriate when there is excess capacity in the current system that can accommodate some growth, but the CIP also includes projects that will provide system expansion, required to support growth.

System and CIP analysis includes:

- Reviewing CIP and existing debt service for expansionary projects, or portions thereof
- Analyzing fixed asset inventories, including calculating replacement cost and remaining useful life
- Considering other documents the City may have, determines the portion of the City share of those assets, if any, that may be used to serve new development
- Identifying other funding sources such as grants or developer contributions that may have paid for part of system costs, or a portion of the system that serves specific developments and will not benefit new development

All these approaches/analyses are considered in updating impact fees.

Non-Ad Valorem Special Assessments

Much like impact fees, Florida statutes and case law governing special assessments have defined the best practices for methodology and assessment calculation. The case law has defined two basic requirements:

1. The service and facilities paid for by the assessments must convey a **special benefit** to the real property subject to the assessment.
2. The total amount imposed must be **fairly and reasonably apportioned** among the affected properties.

We start with the revenue requirement from the revenue sufficiency analysis as described above. Then the analysis consists of the following elements:

Finding of Benefit

In order to determine the assessments for each parcel, we first review the City’s property data. We determine the parcels that will receive special benefit from the project and the type/level of benefits received.

Cost Apportionment

Then we consider the methodology to be used in apportioning the revenue requirement to the benefitting parcels. We will populate our assessment model. The model allows us to review the methodology and revenue requirements and test the impacts to various property uses and sizes.

In a meeting with the City, we will discuss any recommended changes to the existing methodology and recommend a methodology that is in keeping with the City's methodology requirements, case law, and Florida Statutes.

Assessment Calculation

We then calculate the assessments for each parcel at 100% cost recovery and other levels of cost recovery. To the extent desirable, we will discuss phasing in the full cost recovery over time.

Assessment Roll & Future Updates

Upon completion of the analysis, we work with the Sarasota County Tax Collector to deliver the assessment roll in a timely manner, in the format required. Assessments have to be provided to the Tax Collector annually, applying the methodology to parcels based on property use and characteristics. We can assist the City in these updates.

Passing non-ad valorem special assessments also requires a mailing in advance of the public meeting for adoption. We can assist the City in this mailing as well.

Other Fees

We will obtain a list of the City's current user fees and charges. To the extent required, we will examine the labor, overhead and indirect costs, materials, and equipment costs necessary to provide these services and calculate the updated fees at 100% cost recovery. We can meet with members of staff from various departments to determine the level of effort, supplies, and equipment required for each task. We will identify other charges that the City might consider based upon the services provided and fees charged by other cities. We will discuss the desired cost recovery for each fee with the City. If the City feels that 100% cost recovery is not feasible all at once, we will discuss phasing in the full cost recovery over several years.

Rate/Fee Comparisons

For various rates and fees calculated, we can conduct a survey of comparable entities to determine the City's charges relative to these other entities. We discuss the results of these surveys in meetings with City staff and include them in presentations to the Council and public and in our reports.

Presentation of Results & Implementation Assistance

Public Meetings

In addition to written memorandums, we can develop a **PowerPoint presentation** summarizing the findings of any analysis and can attend **meetings with the City Council and/or public** to present the results of our

analysis. This is the first time many of the residents will hear the details of the study performed. It is important to convey that the City is acting in the best interests of its residents. We can communicate:

- The responsibility of a City to provide **essential services** for its residents
- The **key issues** you are facing and the associated costs
- The methodology and **basis for calculating rates/fees/assessments**, including the equitable distribution of costs

Ordinance/Policy Review

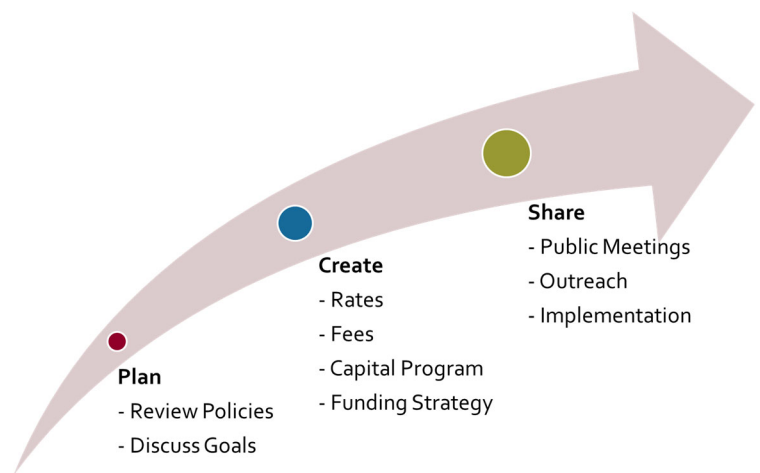
As part of financial studies, we discuss with City staff any policies/ordinances/resolutions that may be out of date or need to be updated due to the proposed rates/fees/assessments. We also consider additional items that could be included in your ordinances/resolutions in the future.

This is an appropriate time to also discuss other **City allocations and policies** that can be updated or have been analyzed during the study, such as **working capital reserve targets**, capital/rate stabilization reserve funding, indirect administrative cost allocation to departments/funds, etc.

We will discuss policy recommendations and any other recommendations with City staff and can be available should the City want us to work with City attorneys to update ordinance or policy language.

What Makes Our Project Approach Different?

Project success couples experience in **political decision making** with **input from you** and your staff, and the **technical ability** to plan for your future success. We understand that an effective financial plan does not look to simply “balance the budget”. Rather, it should be a long-term forecast that helps guide future decision-making, **identifying trends and vulnerabilities** that affect long-term financial sustainability.



Our strategic approach combined with effective communication demonstrates to you, your Council, and your residents how today’s decisions will affect future outcomes.



Tab 3

Qualifications of the Firm



TAB 3 QUALIFICATIONS OF THE FIRM

Our firm stability and Management Services group capabilities demonstrate our ability to perform the services requested.

About SCS

SCS one of the oldest and largest employee-owned consulting firms in the United States. **Founded 53 years ago**, on Earth Day in 1970, SCS specializes in providing comprehensive consulting services for local government and private industry clients.

Our firm, Stearns, Conrad and Schmidt, Consulting Engineers, Inc. dba SCS Engineers is an S-Corporation. We are financially strong and committed to our continued financial health, because we know that our success ultimately depends on your confidence in us. Our capital structure and liquidity are sound, our employee ownership (ESOP) model provides for sustainability, and our internal controls and business standards are designed to service our clients. We maintain a disciplined focus on risk management and operate conservatively to minimize risk. Our current Dun and Bradstreet rating is 4A2, indicating sound financial strength.

Our corporate headquarters and the Tampa office, which will lead the work and be the local contact for this project, are listed below:

Corporate Office: 3900 Kilroy Airport Way, Suite 100, Long Beach, CA 90806
Phone: 800-326-9544

Local Office: 3922 Coconut Palm Drive, Suite 102, Tampa, FL 33619
Phone: 608-224-2830

Our website, www.scsengineers.com, has a complete listing of our office locations and contact information.

The People

Our staff of **over 1,000 consultants** includes **economists, rate and financial experts**, engineers, scientists, **operations experts**, and field staff. Our experts are leaders of industry, creating/participating in workshops and conferences, technical papers, research, and national and state-level legislative and rule-making processes.

Local governments and utilities regularly confront financial sustainability concerns stemming from issues such as population growth, changing technologies and levels of service, operating cost inflation, and staffing concerns. These issues put pressure on the City or utility to implement tax, fee, assessment, or rate increases. At the same time, however, there is often pressure from political decision-makers and residents to do more with less.

Rate and fee studies, special assessments, billing/policy reviews, and efficiency improvements for local governments are at the core of our Management Services practice. We also possess comprehensive knowledge covering the entire spectrum of utility industry issues. The professionals on SCS's project team for this assignment have completed similar rate studies, financial assessments, capital plans, strategic plans, program assessments, system evaluations, privatization evaluations and/or other financial evaluations and modeling efforts.

What Sets Us Apart

You require expertise in data analysis, rate structure and billing analysis, policy/ordinance review, benchmarking, state and national trends, and policies and best practices specific to Florida. **Our team includes local and national experts** and I am confident in our ability to deliver a thoughtful and thorough analysis. Other benefits:

- We offer **customized rate and financial solutions** with an easy-to-understand interface. Our tools simplify the decision-making process, allowing you to consider the factors critical to comparing utilities and rate setting in a **visual format**.
- We are **experienced in clearly communicating results** in meetings and public settings, which often dictates whether recommendations will be welcomed or challenged by decision makers.
- We have **time and commitment** to be dedicated to your needs.

Other Selected SMM & Management Services Capabilities

Strategic & Financial Advisory	<ul style="list-style-type: none"> • Business Advisory Services • Feasibility Analysis • Funding Strategies 	<ul style="list-style-type: none"> • Cost-Benefit Analysis • Affordability Analysis • Grant Planning & Writing
Organizational Assessments	<ul style="list-style-type: none"> • Organizational Structure • Labor/Operational Benchmarking • Customer Billing & Service Reviews • Special Event Planning • Staffing Analysis 	<ul style="list-style-type: none"> • Operational Analysis • Process Improvement • Benchmarking of Services & Fees • Performance Reviews • Policy Analysis
Financial & Economic Analysis	<ul style="list-style-type: none"> • Rate Studies • Cost of Service Studies • Alternative Rate Structures • Indirect Cost Apportionment • Reserve Fund Analysis • Data Collection & Research • Miscellaneous Fee Development 	<ul style="list-style-type: none"> • Demand Analysis & Forecasting • Franchise Audits • Development Fees • Non-Ad Valorem Assessments • Zero Based Budgeting • Impact/Capacity Fees • Revenue Diversification/Optimization
Program Planning & Development	<ul style="list-style-type: none"> • Operational Assessments • Level of Service Assessments • LEED Certification • Evaluation of Plan Alternatives 	<ul style="list-style-type: none"> • Public-Private Partnership Planning • Fleet/Equipment Replacement Plans • Sustainability Plans • CIP/Asset Management Plans
Other Consulting Services	<ul style="list-style-type: none"> • Public Education Campaign • Expert Witness Testimony • Public Education Programs • Public Meetings • Regulatory Reporting 	<ul style="list-style-type: none"> • Workshops and Seminars • Reserve Fund Analysis • Contract Management Solutions • Ordinance Review • Negotiation Facilitation

Our financial sustainability solutions include rates, fees, special assessments, and other taxing programs and policy reviews for utilities and general government.



Tab 4

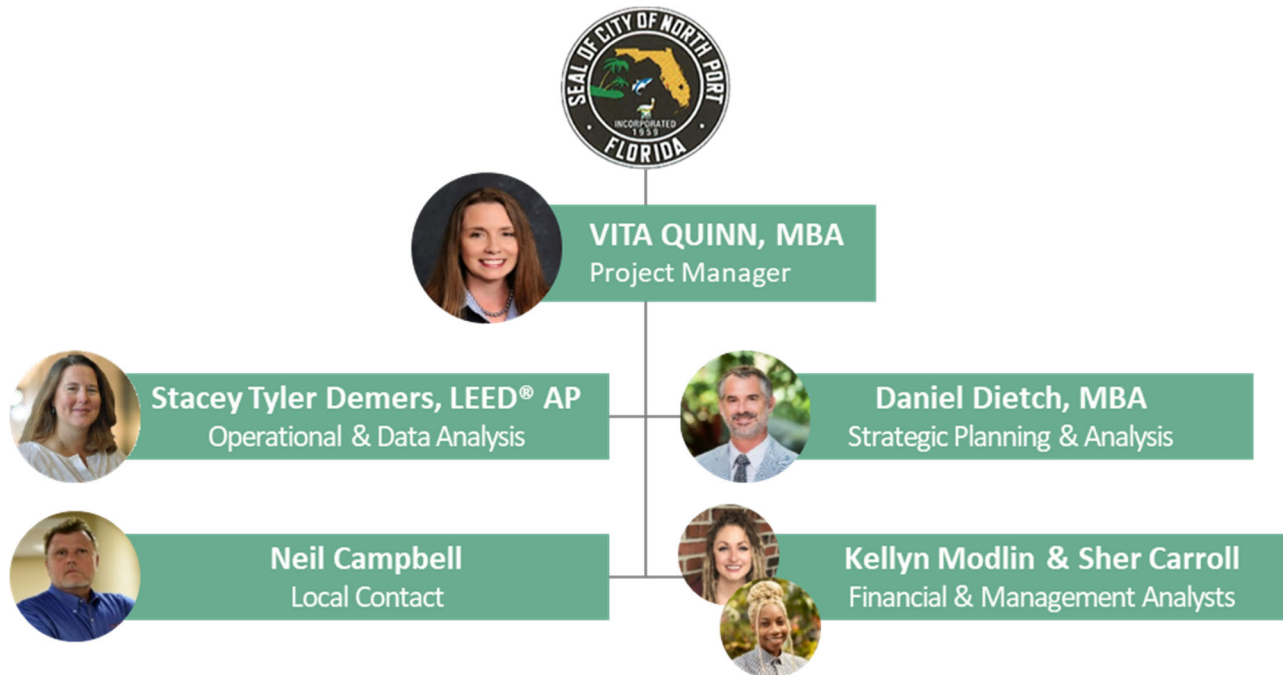
Project Team and Project Manager Experience

TAB 4 PROJECT TEAM AND PROJECT MANAGER EXPERIENCE

All members of our project team are experienced leaders on similar projects and are available and ready to perform the work you require.

Our Team of Experts

Our team members, highlighted on the following pages, combine technical expertise and knowledge of the political environment with **the ability to meet your greatest challenges.**





EDUCATION

MBA – Finance/Real Estate Development, Nova Southeastern University, Florida

BS – International Economics, Florida Atlantic University, Florida

PROFESSIONAL AFFILIATIONS

Solid Waste Association of North America – Board of Directors

American Public Works Association – Member

National Association for Business Economics – Member

PROFESSIONAL EXPERIENCE

Vita has 17 years of experience working with public sector entities as a management consultant and financial analyst. She has developed financial sustainability solutions for various general governments, enterprise funds, and quasigovernmental entities. Her areas of expertise include non-ad valorem special assessment development, fiscal impact analysis, cost-benefit analysis, capital planning, impact fee development, and bond feasibility analysis. Her utility experience includes cost apportionment and rate/fee/tax design for solid waste, recycling, stormwater, water, and sewer. **She will act as Project Manager and lead all work for the City.**

SELECTED RATE & COST OF SERVICE STUDIES

- Broward County, FL – Revenue Development & Benchmarking for Proposed Independent Authority
- City of Atlanta, GA –Rate & Utility Billing Study
- Village of New Lothrop, MI – Wastewater/Stormwater Asset Management Plan
- City of Myrtle Beach, SC – Rate & Fee Study / Billing Analysis
- City of Cocoa, FL – Integrated Utility Analysis, Regional Water Rate Development
- City of Brownsville, TX – 5-Year Financial Services/Rate Studies
- City of Anaheim, CA – Utility Revenue Sufficiency Analysis and Updates
- City of Council Bluffs, IA – Landfill and Recycling Center Revenue Sufficiency Analysis
- Clay County Utility Authority, FL – Water & Sewer Revenue Sufficiency, Lakes Replenishment Program
- City of Monrovia, CA – Hauler Rate Analysis
- Reno County, KS – Annual Rate Model Updates/Reserve Calculation
- City of Bristol, VA – Solid Waste Collection Rate Study
- City of Wauchula, FL – Solid Waste Rate Study
- Ft Lauderdale, FL – General Fund, Water, Sewer, Stormwater, Sanitation, Spec Rev Funds Analysis
- Nassau County, FL – Water/Sewer Rate Study, Customer Deposit Review, Miscellaneous Fee Development
- City of Sheridan, WY – Water, Sewer, & Solid Waste Rate and Financial Plan Updates
- City of Davis, CA – Rate Study
- City of St. Cloud, FL – General Fund & Utility Integrated Analysis (Water, Sewer, Bulk Water)
- Indian Creek Village, FL –Water and Stormwater Revenue Sufficiency Analysis
- City of Zephyrhills, FL – General Fund Financial Sustainability Analysis
- Greenville County, SC – Solid Waste Tipping Fee Study
- Junction City, OR – Water, Sewer, and Sanitation Rate Study
- City of Tempe, AZ – Solid Waste Rate Design
- City of Denton, TX – Water/Sewer Rate Study and Benchmarking
- Culver City, CA – Solid Waste Rate Study

- City of Grand Island, NE – Landfill Tipping Fee Study and Capital Feasibility Analysis
- City of Dothan, AL – Environmental Svcs Rate Study
- City of New Braunfels, TX – Solid Waste Management Plan Update and Rate Study
- Stanford University, CA – Annual Solid Waste Rate Studies
- City of West Palm Bch, FL – Utility Rate Study
- City of Sheridan, WY – Tipping Fee Study and Financial Assurance Estimates
- City of Port Orange, FL – Water & Sewer Rate Study
- City of Odessa, TX – Solid Waste Management Plan
- Okaloosa County, FL – Water & Wastewater Revenue Sufficiency Analyses
- City of Galveston, TX – Water and Sewer Rate Study and Benchmarking Analysis
- Funding Analysis, and Comparative Impact Fee Study
- City of Neptune Beach, FL – Water & Sewer Revenue Sufficiency Analysis
- City of Temple Terrace, FL – Solid Waste and General Fund Integrated Analysis
- City of Virginia Beach, VA – Utility Revenue Sufficiency Analysis
- Yakima County, WA – Solid Waste Management Plan and Rate Study
- City of Killeen, TX – Utility Rate Study
- Village of Pinecrest, FL – Stormwater Fee Study
- Cass County, IA – Landfill Revenue Sufficiency
- City of Coconut Creek, FL – Water/Wastewater Utility Rate Study
- City of Cape Coral, FL – Water & Sewer Rate Study
- City of Alliance, NE – Utility Revenue Sufficiency
- Town of Mount Dora, FL – Stormwater Rate Study
- City of Clearwater, FL – Water, Sewer, and Solid Waste Revenue Sufficiency Analysis
- City of Fort Myers, FL – General Fund Financial Sustainability Analysis
- City of New Port Richey, FL – General Fund and Utility Integrated Financial Sustainability Analysis
- Indian Creek Village, FL – General Government Financial Sustainability Analysis

SPECIAL ASSESSMENTS

- Town of Golden Beach, FL – Technology Services Assessment Albemarle County, VA – Fiscal Impact Analysis / PPP
- Okeechobee County, FL – Fire/EMS Assessment
- City of Anaheim, CA – Resort Maintenance Assessment District Assessment Analysis
- City of Coconut Creek, FL – Fire Assessment
- Village of Pinecrest, FL – Water Capital Assessment
- Miami Shores Village, FL – Water & Sewer Capital and Maintenance Assessments
- City of North Port, FL – Road & Drainage District Assessment Roll Updates
- The Villages Community Development District, The Villages, FL – Non-Ad Valorem Assessment Allocation
- Indian Creek Village, FL – Road Capital Assessment
- City of Sarasota, FL – Parking Garage Assessment Development
- DeSoto County, FL – Landfill Operations Revenue Sufficiency Analysis, Landfill Capital Assessment Revenue Sufficiency Analysis and MSBU Update
- City of Orange City, FL – Stormwater Assessment and Enterprise Fund Development
- Putnam County, FL – Fire Protection Assessment Development
- Coral Springs Improvement District, FL – General Fund Stormwater Assessment
- City of Casselberry, FL – Street Lighting Assessment
- Lealman Fire District, FL – Fire Assessment
- Alachua County, FL – Fire Assessment

IMPACT FEES

- Cedar Hammock Fire District, FL – Fire Impact Fee Update
- City of St. Cloud, FL – Water & Sewer Impact Fees
- City of Glendale, CA – Peer Review of Franchise Fee and Vehicle Impact Fee Calculation
- City of Sheridan, WY – Water & Sewer Plant Investment Fees
- City of Deltona, FL – General Government Impact Fee Updates (Parks & Recreation, Police, Fire, Transportation, Library)

RECENT ECONOMIC/PROGRAM/FUNDING ANALYSIS

- Waste Management, USA – Cost-Benefit Analysis of Facility Automation
- Albemarle County, VA – Fiscal Impact Analysis / PPP
- Yakima County, WA – Labor Benchmarking Study
- Dane County, WI – Analysis of Debt Funding, New Site Development, Rate Alternatives
- City of Anaheim, CA – Facilities Labor Rate Update
- City of Odessa, TX – Fleet Rental Rate Analysis
- Chittenden Solid Waste District, VT – Compost Business Case Analysis / PPP Analysis
- The Recycling Partnership – Analysis of Recycling Program Alternatives
- Okaloosa County, FL – Revenue Bond Feasibility Analysis, Utility Privatization Study
- City of Bristol, VA – Solid Waste Independent Cost and Landfill Alternatives Analysis
- City of Glendale, CA – Solid Waste Rate Matrix Development
- Oklahoma City, OK – Analysis of Brownfields Capital Projects Funding/Database
- City of Omaha, NE – Bid Evaluation Forms for Capital Financing
- Town of Longboat Key, FL – Beach Renourishment Tax Program Update
- Plant City, FL – General Fund Fiscal Impact Analysis
- City of Dubuque, IA – Financial Analysis of Alternative Technologies
- City of Lynchburg, Virginia – System Evaluation and Enterprise Fund Financial Plan
- City of San Diego, CA – Transfer Station Sizing Alternatives Analysis
- Salinas Valley Solid Waste Authority, CA – SB 1383 Planning and Cost Analysis
- Los Angeles County, CA – Organics Alternative Technology Comparative Analysis
- City of San Antonio, TX – Analysis of MRF Alternatives / PPP Feasibility Analysis
- Manatee County, FL – Facility Location Breakeven Analysis
- Mattress Recycling Council, CA – Analysis of Disposal Alternatives
- City of Davis, CA – SB 1383 Planning and Financial Feasibility Analysis
- Stanford University, CA – Zero Waste Program Assistance
- City of Waynesboro, VA – Solid Waste Collections System and Recycling Evaluation
- City of Lynn Haven, FL – Fiscal Impact Analysis
- City of New Port Richey, FL – General Fund Indirect Cost Allocation

OTHER RECENT PROJECTS

- DeSoto County, FL – MSBU Update
- City of Deltona, FL – General Government Impact Fee Updates (Parks & Recreation, Police, Fire, Transportation, Library)
- Fresno County, CA – Rate Negotiations
- City of Glendale, CA – Peer Review of Franchise Fee and Impact Fee Calculation
- City of Atlanta, GA – Expert Witness Services
- Stanford University, CA – Annual Rate Negotiations
- Broward County, FL – Revenue Development for Independent Authority



EDUCATION BS – Statistics, Virginia Polytechnic and State University

EXPERIENCE & ROLE IN THIS PROJECT

Stacey has **30 years of experience in the solid waste field** focusing on developing, evaluating and improving utility programs. As a statistician, she has strong analytical skills in planning, statistics, program/operational benchmarking, and cost modeling. **Her role includes analysis of data and user characteristics, operational evaluation, and demand analysis.**

BENCHMARKING & OUTREACH

- City of Oklahoma City, OK - Evaluation of Program Alternatives
- City of Waco, TX - Assessment of Waste Diversion Potential
- Mecklenburg County, NC - Program Development for Public Facilities
- Montgomery County, MD - Audit of Businesses, Documentation of Commercial Activity
- Mid-America Regional Council, MO – Potential Program Assessment
- Prince George’s County - Facility Siting Study

ECONOMIC/FEASIBILITY ANALYSIS

- Frederick County, VA – Economic Analysis of Programs
- Northern Shenandoah Valley Regional Commission, VA - Evaluation of Regional Program Alternatives
- University of Maryland - Feasibility of Residential Program Alternatives
- District of Columbia - Facility Needs Assessment
- City of College Park, MD - Efficiency and Equity of Municipal Services
- Rockbridge County, VA – Program Evaluation
- Fairfax County, VA - Commercial Establishment Program Evaluation
- Pentagon Reservation – Evaluation of Program Alternatives
- Anne Arundel County, MD - Eval of Special Waste Handling
- Montgomery County, MD - Cooperative Pilot Program, Research Assistance, Feasibility of Program Recommendations

STRATEGIC PLANS

- Prince William County, VA - Management Plan
- Prince George’s County - Zero Waste Strategy
- Wake County, NC – Analysis of Facility Life
- Cities/Fort Hood, TX - Regional Strategic Plan
- Town of Chapel Hill, NC - Review of Operations and Evaluation of Options

FINANCIAL/RATE STUDIES

- City of Long Beach, CA - Modeling Cost of Service for Residential and Commercial
- Product Stewardship Institute - Modeling Development of Paint Management System
- Rivanna Solid Waste Authority (RSWA), VA - Utility Fee Assessment Study
- Southeastern Public Service Authority, VA - Waste Generation and Utility Fee



EDUCATION Certificate – Good Government Initiative, University of Miami
M.B.A. – Management, University of Miami
M.P.S. – Environmental Management, Cornell University
B.A. – Geology, Skidmore College

PROFESSIONAL REGISTRATIONS

Certified Construction Documents Technologist (Construction Specifications Institute)
Six Sigma Yellow Belt (University of Miami)
Climate Reality Leadership Corps (The Climate Reality Project)

COMMUNITY ENGAGEMENT

- Clean Energy Coastal Corridor, Vice-Chair, 2013 – Present
- The CLEO Institute, Board VP, 2015 – Present
- Town of Surfside, Mayor, 2010 - 2020
- 100 Resilient Cities: Living with Water – Innovative Infrastructure Work Group, 2018
- American Flood Coalition, Advisory Board Member, 2018 – Present
- Miami-Dade County Waterfront Recreation Access Plan Steering Committee, Member, 2019 - 2021

SELECTED PROJECT EXPERIENCE

Wastewater Treatment Plant Contract Operations; City of Norwalk; Norwalk, Connecticut.

Assisted with the evaluation and selection of a contract operator for the City of Norwalk Wastewater Treatment Facility. Responsibilities included preparing the service agreement term sheet, performing proposal evaluations, and assisting with the development of the service agreement.

Palm Bay Vision Plan; City of Palm Bay; Palm Bay, Florida.

Deputy project manager for the planning and execution of a vision plan to guide future city development. Activities included facilitating a vision planning workshop (Phase I) in April 2006 with department directors and the City Council and subsequent vision setting and scenario planning (Phase II) phases with the Vision Plan Steering Committee and community stakeholders. The project is expected to position the City to be the first Florida community to comply with the revised Senate Bill 360 related to community visioning.

Operation and Maintenance Manual; DuPage Water Commission; DuPage, Illinois.

Assisted with technical edits to the online operations and maintenance manual. Used Hot Metal Pro web development software to finalize the HVAC portion of the manual.

Management Audit; Escambia County Utilities Authority; Pensacola, Florida.

Deputy project manager for the management audit designed to identify opportunities to improve the Escambia County's organizational systems and processes to better meet its future challenges. Responsibilities included overall

project coordination, as well as assisting with the development of key deliverables including, kick-off meeting presentation, process documentation memoranda, and management audit presentation and report. Additional activities included performing management interviews and facilitating the kick-off meeting.

Beneficial Reuse of Sediments; Harris County Flood Control District; Houston, Texas.

Served as quality consultant for the beneficial reuse of dredged sediment project performed for the Harris County Flood Control District. The project considered the feasibility of using composting technology to transform dredged sediments into compost of sufficient quality that it could be used in public parks. Project tasks included assessing technical treatment options, determining a regulatory permitting strategy, and identifying an effective public relations approach.

Annual Report; Lee County; Fort Myers, Florida.

Performed small meter inspections and analysis as part of the utility's annual report.

Lee County Water and Sewer Engineer; Fort Myers, Florida.

Evaluated the type and level of property insurance carried for the water and wastewater systems as part of the annual engineering report. Work included identifying items to be covered, reviewing existing coverage, and providing comments and recommendations. Interfaced with the County Risk Program Manager to identify and review key reports including current insurance policy declarations, listings of insurable values of water and wastewater assets, and the actuarial report of the Self-Insurance Loss Fund.

Lynn Combined Sewer Overflow Abatement System; Lynn Water and Sewer Commission; Lynn, Massachusetts.

Assisted with the request for proposal (RFP) preparation activities for the procurement of the design/ builder for the Lynn Water and Sewer Commission's combined sewer overflow abatement system. Responsibilities included developing, reviewing, and editing portions of the Lynn CSO request for proposals. Portions developed included escalation indices, a project summary matrix for the RFP in advance of contract principles, and coordination of numerous addenda to the RFP.

PBC Debris Management; Palm Beach County Solid Waste Authority; West Palm Beach, Florida.

Provided debris recovery project management assistance related to Hurricanes Frances, Jeanne and Wilma. Activities included logistics coordination and management and reporting services related to loading and disposal site monitoring, daily status reports, debris contractor oversight, and quality control auditing.

NEIL CAMPBELL | Local Contact



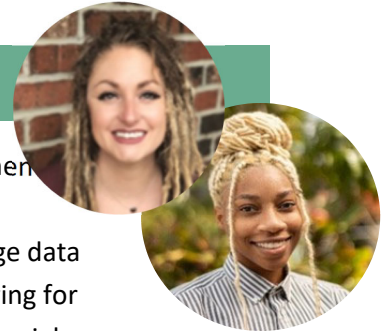
EDUCATION BS – Geology, University of Edinburgh, 1991

EXPERIENCE & ROLE IN THIS PROJECT

Neil's role in this project is for program analysis, **coordinating resources, and client satisfaction for the City.**

His experience includes large commercial, gas, landfills, and transportation. Other projects have included waste composition studies, **rate studies**, compliance audits, site assessments, and preparation of various procurement documents.

KELLYN MODLIN & SHER CARROLL | Financial & Management Analysts



Our Management Services group has financial analysts, data analysts, and management analysts ready to perform the services you require. Kellyn and Sher will be **lead analysts** for this project team. Their experience working with large data sets, managing databases, and creating financial models for forecasting and cost saving for local government clients make them ideal for this project. Their experience with financial modeling and visualization along with rate and fee development helps provide clients with an accurate and proficient analysis.

SUPPORT STAFF

Vita selected the above project team based on their experience and availability, but SCS employs a staff of **more than 550 professionals** with a variety of technical backgrounds relevant to this project, including nationally recognized strategic planners, planning experts, engineers, and environmental contractors. The City's team **can and will engage these resources as needed** to address the City's most complex and critical needs. We hope to have the opportunity to introduce you to the broader collection of our experience.

Our project team is excited to introduce you to some of our relevant project work and outcomes on the following pages.



Proficiency with Similar Systems and References



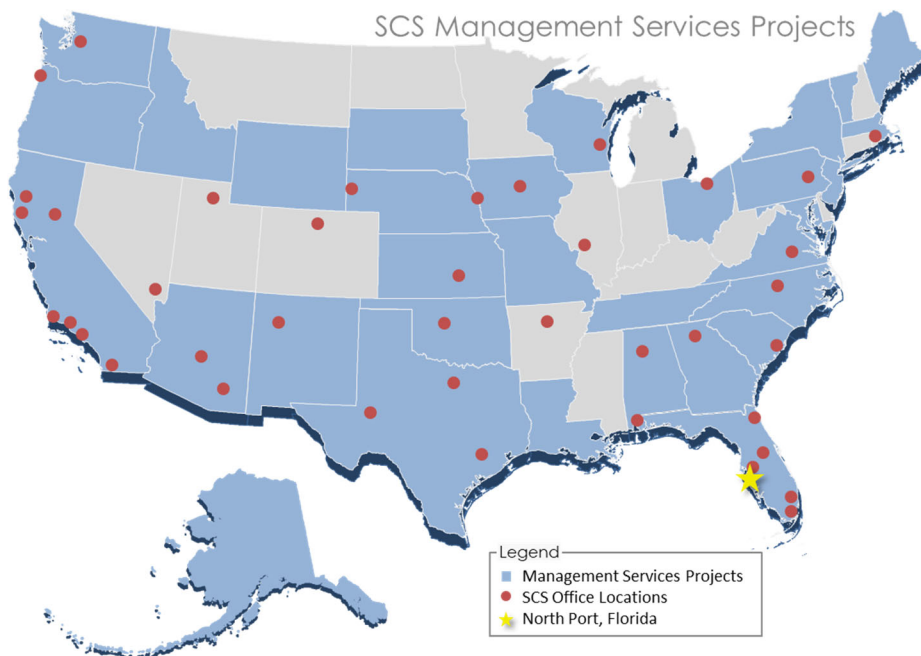
TAB 5 PROFICIENCY WITH SIMILAR SYSTEMS AND REFERENCES

Our team of professionals have performed many studies in Florida and throughout the United States similar to the City's needs.

Relevant Project Experience

Over the years, SCS has literally completed hundreds of studies. Your Project Manager, Vita Quinn, has completed rate, special assessment, or cost-benefit analysis studies for Broward County, Florida, the City of San Antonio, Texas; the City of Myrtle Beach, South Carolina; and City of Atlanta, Georgia, just to name a few, in the last several years.

The map visually illustrates the locations of key offices and recent projects in this practice.



WE ENCOURAGE YOU TO REACH OUT TO ANY OF OUR CLIENTS TO DISCUSS THEIR SATISFACTION WITH OUR SERVICES.



Solid Waste Rate Study & Expert Witness Services

Atlanta, GA

The Story

Historically, the City's solid waste operations, although an Enterprise Fund, have not been sufficiently funded, resulting in significant indebtedness to the General Fund. The City charges solid waste fees to its customers on their tax bills and in 2020 engaged SCS to update their solid waste rate methodology and calculations, as well as to consider other billing methods that may be appropriate for customer billing.

The Process

The study first involved a financial projection over a multi-year period. The analysis considered indebtedness to the General Fund, the basis for that calculation, and repayment. Part of this process involved conversations with Finance regarding the repayment of the indebtedness, as well as General Fund reimbursement for certain solid waste services and common good services not included in the solid waste and recycling rates. Once we developed a plan of rate and revenue adjustments, we performed a cost of service analysis.

Using staffing information and extensive work with staff, we allocated employee salaries and equipment time to each of the various solid waste services and other functions that the City provides. With this information, billing system information, parcel data, annual tonnage data, and other input from staff, we apportioned all of the City's budget into each of the identified functions and services. These then became the revenue requirement for updating the rate components and reimbursable services.

The study involved significant efforts to understand the City's current billing system, customer classes, customer database for collections, and rate structure, including the City's ordinance and Charter. We identified questions/issues in the City's billing system and methodology and worked extensively with staff and GIS to identify the customers and levels of service and calculate new rates. There were legal concerns for which we were engaged for expert witness services as required and for which we provided input to City attorneys regarding rate methodologies and billing.

The Results

Working with City staff and attorneys, we developed a methodology to charge for solid waste and recycling collection, and for various special services such as street sweeping and dead animal collection. We worked with City attorneys to update the City's Charter and ordinances, and present the results of the study and several rate recommendations for the special services in public meetings. The City adopted the recommended rates for solid waste and recycling and the Council chose to adopt the ad valorem method for funding the special services not related to curbside solid waste/recycling collection. SCS continues to work with the City in support of updating their rates, billing system, and operational processes to improve efficiency, accuracy, and ease of future billing.

Reference

Philip Gildan
Attorney to City
561-758-4737
gildanp@gtlaw.com
2020 – 2022
\$200,000



Water, Wastewater, and Solid Waste Utility Rate & Fee Study (and Annual Updates), Impact Fee Study

City of Sheridan, Wyoming

The Story

The City operates a water utility, wastewater utility, and a landfill and solid waste collections utility. The three operate as individual enterprise funds, although there are some payments between them for billing and handling of sludge. Some large alternative water supply and landfill projects are planned in the near future, requiring a plan for the financial stability of its funds over a multi-year projection period. The City has engaged SCS since 2019 for rate/fee services.

The Process

SCS initially performed a rate study and tipping fee study. We also worked with City staff and Council to consider options to incorporate a Pay-As- You-Throw program option into the City’s solid waste rate structure. Annually, SCS updates the revenue sufficiency analysis portion of this study for the water, wastewater, and solid waste utilities.

In the revenue sufficiency analysis, SCS conducted an integrated analysis to evaluate the City’s various rate/fee revenues, model the dynamic interaction between the enterprise funds, and determine the level of rate increases necessary to meet all of the current and projected financial requirements over a ten-year projection period.

The most recent update involved creating a 5-year rate plan for the utilities that would be presented to the City Council. The study concluded that, while the City’s water rates are sufficient throughout the 5-year plan, wastewater and solid waste rates would not be sufficient to fund all of its ongoing operations, capital, and reserve requirements. We created a financial management plan for each utility to address the revenue shortfall.

The City also engaged SCS to update its Plant Investment Fee (PIF), which is an impact fee, for water and wastewater. The Council had recently adopted a master plan that stressed the need for affordable housing in the City, so they wanted to address the PIFs paid by residential properties of various lot and home sizes.

The Results

Several public meetings with Council were held to address the rate plan recommendations and policies regarding reserve levels for each of the funds. City Council adopted the 5-year financial plan recommendations.

Another public meeting addressed the PIF and presented several methodologies that would allow smaller residential homes with smaller irrigable lot sizes to pay less than larger homes with larger irrigable lot area.

SCS continues to work with the City in another study to update its operational/cost relationship with the Sheridan Area Water System Joint Powers Board and consider taking over that system.

Reference
Dan Roberts Utilities Director 307-751-1403 droberts@sheridanwy.net
2019 – 2023 \$46,800 (2022)
Impact Fee 2023 \$24,650



Water Capital Assessment & Update Stormwater Rate Study

Village of Pinecrest, Florida

The Story

Miami-Dade County owns, operates, and maintains a public potable water supply system that serves much of Miami-Dade County, including much of the Village of Pinecrest. The County agreed to serve the remaining parcels in the Village that are not currently on the Water System if they connect, but did not have plans to extend a water line to serve these parcels.

The Village also provides stormwater services to its residents and recovers the cost to provide services via a fee on the residents' property tax bills.

The Process

SCS developed a Water Capital Assessment to recover the capital costs of installing water lines to the benefitting parcels based upon allocation of benefit.

We also assisted the Village in creating the parcel roll with the amounts to be billed on the annual property tax bill as a special non-ad valorem assessment. As there was a delay before bond issuance and assessment implementation, we further assisted in an assessment and roll update in subsequent years.

SCS also developed updated stormwater rates by determining the revenue sufficiency of the stormwater utility and developing a methodology to apportion the costs to provide services proportionally to the services received by each parcel. The study considered updating the Village's Equivalent Residential Unit (ERU) or implementing an alternative methodology for rate calculation.

As part of this process, we worked closely with the Village's attorneys, engineers, and financial advisors.

The Results

As part of the process to adopt new assessments or fees to be charged on the property tax bill, SCS presented to the Village Council and public in several meetings. This helped to gain support and public acceptance of the changes.

Discussions with the Council also resulted in use of American Rescue Plan funds to pay for a portion of the capital for the water project.

Stormwater rate adjustments and alternative methodologies were presented to Council for adoption.

Reference

Village of Pinecrest, FL
Yocelyn Galiano
Village Manager
305.234.2121
manager@pinecrest-fl.gov

Water Capital Assessment
2018 – 2022
\$38,725

Stormwater Rate Study
2018 - 2019
\$38,875



References

TAB 6 REFERENCES

Please feel free to reach out to the references listed here or in our project summaries above.

Selected references and information requested are in the table below.

Other Recent SCS Financial, Rate, & Assessment Study Projects

Client	Year & Cost	Key Facets
Village of Pinecrest, Florida Yocelyn Galiano Village Manager 305-234-2121 manager@pinecrest-fl.gov	2018 – 2022 \$38,725 2018 - 2019 \$38,875	Water Capital Assessment and Assessment Update – To assess parcels for infrastructure costs to connect to water system. Stormwater Fee Study – Calculate various methodologies to update the stormwater ERUs for fee charged on tax roll.
Philip Gildan Attorney to City of Atlanta 561-758-4737 gildanp@gtlaw.com Kanika Greenlee City of Atlanta Dept of Public Works Program Management Officer 404-330-6721 (office) 470-755-4867 (cell) kngreenlee@atlantaga.gov	2020 – 2022 \$200,000	Solid Waste Rate Study and Expert Witness Services – Calculated updated rates and developed new methodology to charge customers. Worked with attorneys in support of process and to develop roll for billing on tax bill.
Dan Roberts City of Sheridan, Wyoming Utilities Director 307-751-1403 droberts@sheridanwy.net	2019 – 2023 \$46,800 (2022) 2023 \$24,650	Water, Sewer, Solid Waste Rate Studies & Updates - Responsible for annual integrated analyses of City enterprise funds and rate updates. Plant Investment (Impact) Fee Study – Developed alternative methodologies for impact fees to target affordable housing and calculated impact fees for each.

Client	Year & Cost	Key Facets
Broward County, Florida Notosha Austin Interim Director 954-474-1880 office 954-577-2390 fax NAUSTIN@broward.org	2022 – 2023 \$32,625	Revenue Development for Proposed Authority - Developing the anticipated capital and operational expense for an authority to build and operate waste-to-energy, yard waste, MRF, and several transfer facilities. Also developing the level of processing fee, transfer fee, and special assessment revenue required to support this investment of approximately \$1.5 billion in capital and the cost of operations.
Town of Golden Beach, Florida Alexander Diaz Town Manager AlexDiaz@goldenbeach.us Lori Smith-Lalla Partner Weiss Serota Helfman 954-763-4242 lsmith-lalla@wsh-law.com	2022 \$18,000	Technology Services Assessment - Developed special assessment to allocate cost of installing high-speed fiber optic internet and CCTV throughout the Town to provide security services to Town parcels.



Litigation and Insurance

NORTH PORT LIBRARY

TAB 7 LITIGATION AND INSURANCE

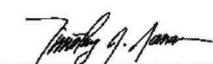
Our goals are aligned to meet your needs. SCS can comply with the insurance coverage required for this contract.

Litigation

SCS has been in business since 1970, has offices throughout the United States, and stands behind our work. An organization of our size and scale occasionally becomes involved in litigation. Of the matters we have been involved in the past, or are currently involved in, none are considered to be material to our operations or our ability to perform the work contemplated for the City of North Port. If selected for negotiations for this contract, we would be happy to provide detailed information on our litigation history on a confidential basis.

Insurance

Provided is a sample evidence of insurance coverage evidencing the coverage types and limits. Upon award, SCS will obtain a final insurance certificate for this solicitation and with the insurance coverage requirements as referenced in RFP.

ACORD		CERTIFICATE OF LIABILITY INSURANCE		3/31/2024	DATE (MMDDYYYY) 03/16/2023	
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 endorsements(s).						
PRODUCER Lockton Insurance Brokers, LLC CA License #0F15767 777 S. Figueroa Street, 52nd fl. Los Angeles CA 90017 213-689-0065			CONTACT NAME: _____ PHONE (A/C, No. EXT): _____ FAX (A/C, No.): _____ E-MAIL: _____ ADDRESS: _____		INSURER(S) AFFORDING COVERAGE NAIC # INSURER A: Zurich American Insurance Company 16535 INSURER B: Steadfast Insurance Company 26387 INSURER C: _____ INSURER D: _____ INSURER E: _____ INSURER F: _____	
INSURED SCS Engineers, SCS Field Services, 1506787 SCS Energy, SCS Tracer Environmental 3900 Kilroy Airport Way, Ste 100 Long Beach, CA 90806-8816						
COVERAGES SCSE01			CERTIFICATE NUMBER: 18259705		REVISION NUMBER: XXXXXXX	
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.						
INSUR	TYPE OF INSURANCE	ADDL SUBR	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> X.C.U Included <input checked="" type="checkbox"/> Contractual Liab GENL AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJE <input checked="" type="checkbox"/> LOG OTHER: _____	N	GLO 0112778-08	03/31/2023	03/31/2024	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (E&O EXCLUDED) \$ 1,000,000 MED EXP (Any one person) \$ 25,000 PERSONAL ADIV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 \$ _____
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SOLE/LEASED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY	N	BAP 0112780-08	04/01/2023	04/01/2024	COMBINED SINGLE LIMIT (Per accident) \$ 2,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX \$ XXXXXXXX
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED: _____ RETENTION \$ _____		NOT APPLICABLE			EACH OCCURRENCE \$ XXXXXXXX AGGREGATE \$ XXXXXXXX \$ _____
A	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROJECTS OR PARTS/RESIDENTIAL OFFICER/OWNER EXCLUDED? _____ If yes, describe under Description in this column.	Y/N	WC0112779-08	04/01/2023	04/01/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER \$ 1,000,000 \$ 1,000,000 \$ 1,000,000
B	<input type="checkbox"/> Env Prof (E&O) - Prof Liab <input type="checkbox"/> - Claims Made	N	PEC 0112862-08	03/31/2023	03/31/2024	Per Claim: 2,000,000 Aggregate: 2,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Evidence of Insurance						
CERTIFICATE HOLDER			CANCELLATION See Attachment			
18259705 SCS Engineers, SCS Energy, SCS Field SCS Tracer Environmental 3900 Kilroy Airport Way, #100 Long Beach, CA 90806-8816			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)			The ACORD name and logo are registered marks of ACORD			



Tab 8

Additional Information



TAB 8 ADDITIONAL INFORMATION

With a 53-year track record of environmental solutions, SCS has enabled the success of thousands of projects.

Tabs 1 through 7 provides relevant qualifications of the proposed SCS team for the professional services, including our experience to conduct fee and rate studies and recommendations, non-ad valorem assessment methodology studies, maintenance/rollup of annual assessments with the property appraiser, assessment studies, impact fees, and fee updates as described in the scope of services. Taking all of this information into account, will clearly show the advantages the City of North Port will obtain by selecting the SCS team.



Tab 9

Submission Requirements and Required Submittal Forms



TAB 9 SUBMISSION REQUIREMENTS AND REQUIRED SUBMITTAL FORMS

At SCS, we try to build quality into all that we do. As employee-owners, we are all responsible for providing quality services to our clients.

This section provides the fully executed required forms:

- Proposal Submittal Signature Form
- Statement of Organization
- References/Client Listing
- Drug-Free Workplace Form
- Public Entity Crime Information
- Non-Collusive Affidavit
- Lobbying Certification
- Conflict of Interest Form
- Vendor's Certification for E-Verify System
- Disclosure Form (Consultant/Engineer/Architect)
- Scrutinized Company Certification Form
- State Registration Requirements – SunBiz Certification

TAB 7 - LITIGATION AND INSURANCE - Have you been involved in litigation in the last five (5) years? If so, describe circumstances and outcome. The proposer shall advise the amount of liability insurance you have.

TAB 8 – ADDITIONAL INFORMATION: Any other pertinent information the proposer chooses to provide.

Tab 9 – SUBMISSION REQUIREMENTS AND REQUIRED SUBMITTAL FORMS: Provide completed required forms in this section. The checklist is provided to assist each Proposer in the preparation of their response. Included in this checklist are important requirements, which is the responsibility of each Proposer to submit with their response in order to make their response fully compliant. This checklist is a guideline which is to be executed and submitted with the required forms. It is the responsibility of each Proposer to read and comply with the solicitation in its entirety.

In addition to the items noted above, proposers are asked to include any additional items that may be needed to complete the services requested that may not have been identified in this RFP.

A. SUBMITTAL REQUIREMENTS

1. **NUMBER OF PAGES:** The proposal shall not exceed (50) pages (one-sided) or (25) pages (two-sided) in length. (The Title Page, Table of Contents, City Required Forms, tabs do not count towards the TOTAL NUMBER OF PAGES).
 - 1.1 When compiling a response, sections should be tabbed and labeled; pages should be sequentially numbered at the bottom of the page; proposals should be bound to allow flat stacking for easy storage; do not use three ring binders of any kind; and sections should be compiled in the sequence list above.
 - 1.2 Place proposal with all the required items in a sealed envelope clearly marked for specification number, project name, name of proposer, and due date and time.
2. **PAPER/FONT SIZE:** 8.5"x11"/Font Calibri 11, PDF FORMAT.
3. **NUMBER OF ORIGINAL PROPOSALS:** One (1) original hard-copy **UNBOUND** (marked "ORIGINAL") and signed in blue ink. **NUMBER OF COPIES:** three (3) hard copies **BOUND** (marked "COPY") (1 original + 3 copies = 4 total submittals).
4. **USB Flash Drive:** One (1) electronic version in Portable Document Format (PDF) on a USB Drive containing the entire submittal. USB drive only. **CDs will not be accepted.**

B. REQUIRED SUBMITTAL FORMS: City Required Submittal Forms/Checklist

READ/EXECUTED & INCLUDED

- Proposal Submittal Signature Form
- Statement of Organization

- References
- Drug-Free Workplace (If Applicable)
- Public Entity Crime Information
- Non-Collusive Affidavit
- Lobbying Certification
- Conflict of Interest Form
- Disclosure Form (Consultant/Engineer/Architect)
- Scrutinized Business Certification Form
- E-Verify Form

- State Registration Requirements (<http://www.sunbiz.org/search.html>)
- Copy of Registration, Attached
- State required license for Prime Firm Only (Not sub-consultants)

- SAMPLE INSURANCE CERTIFICATE:** Demonstrate your firm's ability to comply with insurance requirements. Provide a previous certificate or other evidence listing the Insurance Companies names for both Professional Liability and General Liability and the dollar amounts of the coverage.
 - YES NO Sample Insurance Certificate is included with the submittal
- MBE/WBE/VBE:** If claiming Minority Business Enterprise/Women Business Enterprise/Veterans Business Enterprise, the Prime Firm (not sub-consultant) **shall be** certified as a Minority Business Enterprise by the State of Florida, Department of Management Services, Office of Supplier Diversity pursuant to Section 287.0943, Florida Statutes.
 - YES, CLAIMING MBE/WBE/VBE STATUS AS PRIME ONLY
 - YES, I'VE ATTACHED THE CERTIFICATE OF MBE/WBE/VBE STATUS FROM THE STATE OF FLORIDA AS OUTLINED SECTION 12.
 - NOT CLAIMING MBE/WBE/VBE

THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH YOUR PROPOSAL

STATEMENT OF ORGANIZATION
(Information Sheet for Transactions and Conveyances Corporation Identification)

The following information will be provided to the City of North Port for incorporation in legal documents. It is, therefore, vital all information is accurate and complete. Please be certain all spelling, and capitalization is exactly as registered with the state or federal government.

Name of Respondent: Stearns, Conrad and Schmidt, Consulting Engineers, Inc.

DBA (if any): SCS Engineers

Type of Entity (Sole Proprietor, Corporation, LLC, LLP, Partnership, etc): Corporation

Business Address: 3922 Coconut Palm Drive, Suite 102
Tampa, Florida 33619

Phone: 386-546-7719 Fax: 813-623-6757

E-Mail vquinn@scsengineers.com

Federal Identification Number: 54-0913440

State of Florida Department of State Certificate of Authority Document No.: P17311

Respondent shall submit proof that it is authorized to do business in the State of Florida unless registration is not required by law.

(Please Check One)

Is this a Florida Corporation: Yes or No

If not a Florida Corporation,

In what state was it created: Commonwealth of Virginia
Name as spelled in that State: SCS Engineers, Inc.

What kind of corporation is it: "For Profit" or "Not for Profit"

Is it in good standing: Yes or No

Authorized to transact business
in Florida: Yes or No

Does it use a registered fictitious name: Yes or No

Names of Officers:

President: <u>James J. Walsh, PE</u>	Sr. VP & Secretary: <u>Michael W. McLaughlin, PE</u>
Asst. Secretary & Legal Counsel Sr. Vice President: <u>Thomas W. A. Barham</u>	Sr. VP, CFO, & Treasurer: <u>Curtis P. Jang</u>
Sr. VP Director: <u>Carlo F. Lebron, PE</u>	Sr. VP Director: <u>Robert B. Gardner, PE</u>
Vice President Other: <u>Shane R. Fisher, PE</u>	Vice President Other: <u>Stacey C. Demers</u>

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

REQUEST FOR PROPOSAL NO. 2023-32
PROFESSIONAL SERVICES FOR CITY FEES, RATES, METHODOLOGIES AND ASSESSMENTS

Name of Corporation (As used in Florida):

Stearns, Conrad and Schmidt, Consulting Engineers, Inc.

(Spelled exactly as it is registered with the state or federal government)

Corporate Address:

Post Office Box:

City, State Zip:

Street Address:

City, State, Zip:

3900 Kilroy Airport Way, Suite 100

Long Beach, CA 90806

BUSINESS NAME: SCS Engineers

NAME AND TITLE (PERSON AUTHORIZED TO BIND THE COMPANY): Shane R. Fischer, PE, Vice President

SIGNATURE: 

DATE: June 21, 2023

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

REFERENCES/CLIENT LISTING

The firm shall provide at least five (5) business related references for which they are currently providing or have provided experience in similar scope and size as this RFP within the last five (10) years. A minimum of three (3) references must be for work performed in Florida.

1. Business/Customer Name: Village of Pinecrest, Florida

Name of Contact Person/Title: Yocelyn Galiano, Village Manager

Telephone# 305-234-2121 Fax _____ E-mail manager@pinecrest-fl.gov

Address 10800 Red Road, Pinecrest, FL 33156

Phone Number 305-234-2121 Discipline: Environmental Consultants

Duration of Contract or business relationship Water Capital Assessment and Assessment Update - 2018 - 2022
Stormwater Fee Study - 2018-2019

Type of Services Provided Water Capital Assessment and Stormwater Fee Study

2. Business/Customer Name: Broward County, Florida

Name of Contact Person/Title: Notosha Austin, Interim Director

Telephone# 954-474-1880 Fax 954-577-2390 E-mail NAUSTIN@broward.org

Address 1 N. University Drive, Suite 400, Plantation, FL 33324

Phone Number 954-474-1880 Discipline: Environmental Consultants

Duration of Contract or business relationship 2022 - 2023

Type of Services Provided Revenue Development for Proposed Authority

3. Business/Customer Name: Town of Golden Beach, Florida

Name of Contact Person/Title: Alexander Diaz, Town Manager

Telephone# _____ Fax _____ E-mail AlexDiaz@goldenbeach.us

Address 1 Golden Beach Drive, Golden Beach, FL 33160

Phone Number _____ Discipline: Environmental Consultants

Duration of Contract or business relationship 2022

Type of Services Provided Technology Services Assessment

BUSINESS NAME: SCS Engineers

NAME AND TITLE (PERSON AUTHORIZED TO BIND THE COMPANY): Shane R. Fischer, PE, Vice President

SIGNATURE:  DATE: 6/21/2023

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

REQUEST FOR PROPOSAL NO. 2023-32
PROFESSIONAL SERVICES FOR CITY FEES, RATES, METHODOLOGIES AND ASSESSMENTS

4. Business/Customer Name: City of Atlanta, Georgia

Name of Contact Person/Title: Philip Gildan, Attorney to City of Atlanta

Telephone# 561-758-4737 Fax _____ E-mail gildanp@gtlaw.com

Address 101 E. College Avenue, Tallahassee, FL 32301

Phone Number 561-758-4737 Discipline: Environmental Consultants

Duration of Contract or business relationship 2020 - 2022

Type of Services Provided Solid Waste Rate Study and Expert Witness Services

5. Business/Customer Name: City of Sheridan, Wyoming

Name of Contact Person/Title: Dan Roberts, Utilities Director

Telephone# 307-751-1403 Fax _____ E-mail droberts@sheridanwy.net

Address 55 Grinnell Plaza, sheridan, WY 82801

Phone Number 307-751-1403 Discipline: Environmental Consultants

Duration of Contract or business relationship Water, Sewer, Solid Waste Rate Studies & Updates - 2019 - 2023
Plant Investment (Impact) Fee Study - 2023

Type of Services Provided Water, Sewer, Solid Waste Rate Studies & Updates and Plant Investment (Impact) Fee Study

6. Business/Customer Name: _____

Name of Contact Person/Title: _____

Telephone# _____ Fax _____ E-mail _____

Address _____

Phone Number _____ Discipline : _____

Duration of Contract or business relationship _____

Type of Services Provided _____

BUSINESS NAME: SCS Engineers

NAME AND TITLE (PERSON AUTHORIZED TO BIND THE COMPANY): Shane R. Fischer, PE, Vice President

SIGNATURE:  _____ DATE: 6/21/2023

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

DRUG FREE WORKPLACE FORM

The undersigned Consultant in accordance with Florida Statute 287.087 hereby certifies that
SCS Engineers does:
(Company Name)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug free workplace through implementation of this section.

Check one:

- As the person authorized to sign this statement, I certify that this firm complies fully with above requirements.
- As the person authorized to sign this statement, this firm **does not** comply fully with the above requirements.


Offeror's Signature

6/21/2023
Date

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CONFLICT OF INTEREST FORM

F.S. §112.313 places limitations on public officers (including advisory board members) and employees' ability to contract with the City either directly or indirectly. Therefore, please indicate if the following applies:

PART I.

- I am an employee, public officer or advisory board member of the City
_____ (List Position Or Board)
- I am the spouse or child of an employee, public officer or advisory board member of the City
Name: _____
- An employee, public officer or advisory board member of the City, or their spouse or child, is an officer, partner, director, or proprietor of Respondent or has a material interest in Respondent. "Material interest" means direct or indirect ownership of more than 5 percent of the total assets or capital stock of any business entity. For the purposes of [§112.313], indirect ownership does not include ownership by a spouse or minor child.
Name: _____
- Respondent employs or contracts with an employee, public officer or advisory board member of the City
Name: _____
- None Of The Above

PART II:

Are you going to request an advisory board member waiver?

- I will request an advisory board member waiver under §112.313(12)
- I will NOT request an advisory board member waiver under §112.313(12)
- N/A

The City shall review any relationships which may be prohibited under the Florida Ethics Code and will disqualify any vendors whose conflicts are not waived or exempt.

BUSINESS NAME: SCS Engineers

NAME AND TITLE (PERSON AUTHORIZED TO BIND THE COMPANY): Shane R. Fischer, PE, Vice President

SIGNATURE:  _____ DATE: June 21, 2023

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL


VENDOR'S CERTIFICATION FOR E-VERIFY SYSTEM

STATE OF Florida
COUNTY OF Hillsborough

The undersigned Vendor/Consultant/Contractor (Vendor), after being duly sworn, states the following:

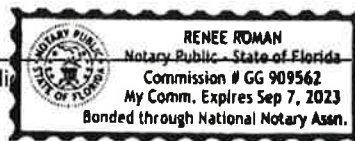
1. Vendor is a person or entity that has entered into or is attempting to enter into a contract with the City of North Port (City) to provide labor, supplies, or services to the City in exchange for salary, wages or other remuneration.
2. Vendor has registered with and will use the E-Verify System of the United States Department of Homeland Security to verify the employment eligibility of:
 - a. All persons newly hired by the Vendor to perform employment duties within Florida during the term of the contract; and
 - b. All persons, including sub-contractors, sub-vendors or sub-consultants, assigned by the Vendor to perform work pursuant to the contract with the City.
3. If the Vendor becomes the successful Contractor who enters into a contract with the City, then the Vendor will comply with the requirements of Section 448.095, Fla. Stat. "Employment Eligibility", as amended from time to time.
4. Vendor will obtain an affidavit from all subcontractors attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien as defined in 8 United States Code, Section 1324A(H)(3).
5. Vendor will maintain the original affidavit of all subcontractors for the duration of the contract.
6. Vendor affirms that failure to comply with the state law requirements can result in the City's termination of the contract and other penalties as provided by law.

VENDOR: SCS Engineers (Vendor's Company Name)


Shane R. Fischer, PE (Vendor's name printed)
Vice President (Title)

Sworn to and subscribed before me by means of physical presence or online notarization, this 21st day of June, ~~2022~~ ²⁰²³, by Shane R. Fischer, PE, as Vice President.

Notary Public



Personally Known X OR Produced Identification _____
Type of Identification Produced _____

THIS PAGE MUST BE COMPLETED AND SUBMITTED

**DISCLOSURE FORM
FOR
CONSULTANT/ENGINEER/ARCHITECT**

Please select (only) one of the following three options:

Our firm has no actual, potential, or reasonably perceived, **financial*** or **other interest**** in the outcome of the project.

Our firm has a potential or reasonably perceived **financial*** or **other interest**** in the outcome of the project as described here: _____.

Our firm proposes to mitigate the potential or perceived conflict according to the following plan:
_____.

Our firm has an actual **financial*** or **other interest**** in the outcome of the project as described here:
_____.

***What does "financial interest" mean?**

If your firm, or employee of your firm working on the project (or a member of the employee's household), will/may be perceived to receive or lose private income depending on the government business choices based on your firm's findings and recommendations, this must be listed as a financial interest. An example would be ownership in physical assets affected by the government business choices related to this project. The possibility of contracting for further consulting services is not included in this definition and is not prohibited.

****What does "other interest" mean?**

If your firm, or employee of your firm working on the project (or a member of the employee's household), will/may be perceived to have political, legal or any other interests that will affect what goes into your firm's findings and recommendations, or will be/may be perceived to be affected by the government business choices related to this project, this must be listed as another interest.

BUSINESS NAME: SCS Engineers

NAME AND TITLE (PERSON AUTHORIZED TO BIND THE COMPANY): Shane R. Fischer, PE, Vice President

SIGNATURE:  **DATE:** 6/21/2023

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

Scrutinized Company Certification Form

Company Name: SCS Engineers
Authorized Representative Name and Title: Shane R. Fischer, PE, Vice President
Address: 3922 Coconut Palm Drive, Suite 102 City: Tampa State: Florida ZIP: 33619
Phone Number: 813-621-0080 Email Address: sfischer@scsengineers.com

A company is ineligible to, and may not, bid on, submit a proposal for, or enter into or renew a contract with the City of North Port for goods or services of any amount if, at the time of bidding on, submitting a proposal for, or entering into or renewing such contract, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Florida Statutes, section 215.4725, or is engaged in a boycott of Israel.

A company is ineligible to, and may not, bid on, submit a proposal for, or enter into or renew a contract with the City of North Port for goods or services of \$1 million or more if, at the time of bidding on, submitting a proposal for, or entering into or renewing such contract, the company is on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Florida Statutes, section 215.473, or with companies engaged in business operations in Cuba or Syria.

CHOOSE ONE OF THE FOLLOWING

- This bid, proposal, contract or contract renewal is for goods or services of less than \$1 million. As the person authorized to sign on behalf of the above-named company, and as required by Florida Statutes, section 287.135(5), I hereby certify that the above-named company is not participating in a boycott of Israel.
- This bid, proposal, contract or contract renewal is for goods or services of \$1 million or more. As the person authorized to sign on behalf of the above-named company, and as required by Florida Statutes, section 287.135(5), I hereby certify that the above-named company is not participating in a boycott of Israel, is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and it does not have business operations in Cuba or Syria.

I understand that pursuant to Florida Statutes, section 287.135, the submission of a false certification may result in the termination of the contract if one is entered into, and may subject the above-named company to civil penalties, attorney's fees and costs.

Certified By: 
AUTHORIZED REPRESENTATIVE SIGNATURE

Print Name and Title: Shane R. Fischer, PE, Vice President

Date Certified: June 21, 2023

Solicitation/Contract/PO Number (Completed by Purchasing): 2023-32

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

2023 FOREIGN PROFIT CORPORATION AMENDED ANNUAL REPORT

DOCUMENT# P17311

Entity Name: STEARNS, CONRAD AND SCHMIDT, CONSULTING ENGINEERS, INC.

FILED
Jun 08, 2023
Secretary of State
1519427173CC

Current Principal Place of Business:

3900 KILROY AIRPORT WAY
SUITE 100
LONG BEACH, CA 90806

Current Mailing Address:

3900 KILROY AIRPORT WAY
SUITE 100
LONG BEACH, CA 90806

FEI Number: 54-0913440

Certificate of Status Desired: No

Name and Address of Current Registered Agent:

C T CORPORATION SYSTEM
1200 SOUTH PINE ISLAND ROAD
PLANTATION, FL 33324 US

The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.

SIGNATURE:

Electronic Signature of Registered Agent

Date

Officer/Director Detail :

Title VP, TREASURER, CFO
Name CURTIS JANG
Address 3900 KILROY AIRPORT WAY
SUITE 100
City-State-Zip: LONG BEACH CA 90806

Title SV
Name MCLAUGHLIN, MICHAEL W.
Address 11260 ROGER BACON DRIVE
City-State-Zip: RESTON VA

Title P
Name JAMES J. WALSH
Address 2060 READING ROAD
City-State-Zip: CINCINNATI OH

Title ASST. SECRETARY
Name KETCHAM, TERESA
Address 3922 COCONUT PALM DRIVE
SUITE 102
City-State-Zip: TAMPA FL 33619

Title VP
Name EDUARDO, SMITH
Address 9500 SOUTH DADELAND BLVD.
SUITE 610
City-State-Zip: MIAMI FL 33156

Title VP
Name LEBRON, CARLO
Address 3922 COCONUT PALM DRIVE
SUITE 102
City-State-Zip: TAMPA FL 33619

Title VP
Name COOPER, DANIEL
Address 3922 COCONUT PALM DRIVE
SUITE 102
City-State-Zip: TAMPA FL 33619

Title VP
Name SHANE, FISCHER
Address 3922 COCONUT PALM DRIVE
SUITE 102
City-State-Zip: TAMPA FL 33619

Continues on page 2

I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.

SIGNATURE: CURTIS JANG

SR VP AND CFO

06/08/2023

Electronic Signature of Signing Officer/Director Detail

Date

Officer/Director Detail Continued :

Title VP
Name MYLES, CLEWNER
Address 440 COLUMBIA DRIVE
SUITE 101
City-State-Zip: WEST PALM BEACH FL 33409

Title SR VICE PRESIDENT
Name BARHAM, THOMAS W A
Address 11260 ROGER BACON DRIVE
SUITE 300
City-State-Zip: RESTON VA 20190

Title VP
Name DIETCH, DANIEL
Address 9500 SOUTH DADELAND BLVD
SUITE 610
City-State-Zip: MIAMI FL 33156

Title VP
Name CARTEE, GAROLD (TONY) A.
Address 2520 WHITEHALL PARK DRIVE
SUITE 450
City-State-Zip: CHARLOTTE NC 28273

Title VP
Name ODOM, BRITTANY
Address 440 COLUMBIA DRIVE
SUITE 101
City-State-Zip: WEST PALM BEACH FL 33409

State of Florida

Department of State

I certify from the records of this office that STEARNS, CONRAD AND SCHMIDT, CONSULTING ENGINEERS, INC. is a Virginia corporation authorized to transact business in the State of Florida, qualified on December 21, 1987.

The document number of this corporation is P17311.

I further certify that said corporation has paid all fees due this office through December 31, 2023, that its most recent annual report/uniform business report was filed on January 17, 2023, 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 Seventeenth day of January,
2023*




Secretary of State

Tracking Number: 3796131197CC

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

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

State of Florida


Department of State

I certify that the attached is a true and correct copy of the Renewal of Fictitious Name Registration for SCS ENGINEERS, which was filed on September 6, 2022, as shown by the records of this office.

The document number assigned to this renewal is G22000110408.

*Given under my hand and the Great Seal of
Florida, at Tallahassee, the Capital, this the
Seventh day of September, 2022*





Secretary of State



CERTIFICATE OF LIABILITY INSURANCE

3/31/2024

DATE (MM/DD/YYYY)
03/16/2023

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 Lockton Insurance Brokers, LLC CA License #0F15767 777 S. Figueroa Street, 52nd fl. Los Angeles CA 90017 213-689-0065	CONTACT NAME: PHONE (A/C. No. Ext): E-MAIL ADDRESS:	FAX (A/C. No):
	INSURER(S) AFFORDING COVERAGE	
INSURED SCS Engineers, SCS Field Services, 1506787 SCS Energy, SCS Tracer Environmental 3900 Kilroy Airport Way, Ste 100 Long Beach, CA 90806-6816	INSURER A : Zurich American Insurance Company NAIC # 16535	
	INSURER B : Steadfast Insurance Company 26387	
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES SCSEN01 **CERTIFICATE NUMBER:** 18259705 **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.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	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"/> X,C,U Included <input checked="" type="checkbox"/> Contractual Liab GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:	N	N	GLO 0112778-08	03/31/2023	03/31/2024	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 25,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 \$
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"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY	N	N	BAP 0112780-08	04/01/2023	04/01/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			NOT APPLICABLE			EACH OCCURRENCE \$ XXXXXXXX AGGREGATE \$ XXXXXXXX \$
A	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	WC0112779-08	04/01/2023	04/01/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	<input checked="" type="checkbox"/> Env Prof (E&O) - Prof Liab <input checked="" type="checkbox"/> - Claims Made	N	N	PEC 0112862-08	03/31/2023	03/31/2024	Per Claim: 2,000,000 Aggregate: 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 Evidence of Insurance

CERTIFICATE HOLDER**CANCELLATION** See Attachment

18259705 SCS Engineers, SCS Energy, SCS Field SCS Tracer Environmental 3900 Kilroy Airport Way, #100 Long Beach, CA 90806-6816	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 