

# City of Fort Lauderdale, FL

## Stormwater Rate Study

RFP# 455-11533



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# BURTON & ASSOCIATES

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# 1. BID/PROPOSAL SIGNATURE PAGES

## BID/PROPOSAL SIGNATURE PAGE

**How to submit bids/proposals:** Proposals must be submitted by hard copy only. It will be the sole responsibility of the Bidder to ensure that the bid reaches the City of Fort Lauderdale, City Hall, Procurement Services Division, Suite 619, 100 N. Andrews Avenue, Fort Lauderdale, FL 33301, prior to the bid opening date and time listed. Bids/proposals submitted by fax or email will NOT be accepted.

The below signed hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the CITY and such acceptance covers all terms, conditions, and specifications of this bid/proposal.

**Please Note:** All fields below **must** be completed. If the field does not apply to you, please note N/A in that field.

Submitted by:  December 16, 2014  
(signature) (date)

Name (printed) Michael Burton Title: President

Company: (Legal Registration) Burton & Associates, Inc.

**CONTRACTOR, IF FOREIGN CORPORATION, MAY BE REQUIRED TO OBTAIN A CERTIFICATE OF AUTHORITY FROM THE DEPARTMENT OF STATE, IN ACCORDANCE WITH FLORIDA STATUTE §607.1501 (visit <http://www.dos.state.fl.us/>).**

Address: 200 Business Park Circle, Suite 101

City St. Augustine State: FL Zip 32095

Telephone No. (904) 247-0787 FAX No. (904) 241-7708 Email: mburton@burtonandassociates.com

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions): 120 days

Payment Terms (section 1.04): net 45 days Total Bid Discount (section 1.05): N/A

Does your firm qualify for MBE or WBE status (section 1.09): MBE  WBE  N/A

**ADDENDUM ACKNOWLEDGEMENT** - Proposer acknowledges that the following addenda have been received and are included in the proposal:

<u>Addendum No.</u>	<u>N/A</u>	<u>Date Issued</u>	<u>N/A</u>
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P-CARDS: Will your firm accept the City's Credit Card (VISA / MasterCard) as payment for goods/services?

VISA YES  NO  MasterCard YES  NO

**VARIANCES:** State any variations to specifications, terms and conditions in the space provided below or reference in the space provided below all variances contained on other pages of bid, attachments or bid pages. No variations or exceptions by the Proposer will be deemed to be part of the bid submitted unless such variation or exception is listed and contained within the bid documents and referenced in the space provided below. If no statement is contained in the below space, it is hereby implied that your bid/proposal complies with the full scope of this solicitation. **PLEASE STATE ANY VARIANCES OR EXCEPTIONS BELOW.** If this section does not apply to your bid, simply mark N/A in the section below.

Variations:  
N/A

revised 06/11/14

## 2. COST PROPOSAL

### PART VI - PROPOSAL PAGES – COST PROPOSAL

Cost to the City: Contractor must quote firm, fixed, fee for all services identified in this request for proposal. This firm fixed fee includes any costs for travel to the City. No other costs will be accepted.

**Failure to use the City's COST PROPOSAL Page and provide costs as requested in this RFP, may deem your proposal non-responsive.**

TOTAL FIRM FIXED FEE    \$ 59,903

**Note:**

*The Detailed Project Work Plan that we present herein (in Section 8.2) addresses the cost allocation and rate design specifications of your RFP and also includes, as Task 1, the determination of the stormwater revenue requirements in the context of a sustainable ten year financial plan. The fixed fee included above specifically addresses the specifications of the RFP in terms of cost allocation and rate design but does not include fees for the Revenue Sufficiency Analysis as described in Task 1 of our above referenced Detailed Project Work Plan (presented in Section 8.2). This is because as part of the General Fund Sustainability Analysis Update which we have been completing for the City for the past two years and which we will be completing under a separate contract during FY 2015, we will be determining the updated revenue requirements of the Stormwater Fund in the context of a sustainable ten year financial plan. If the City desires that the above referenced Revenue Sufficiency Analysis be included under this contract rather than the above referenced contract, upon selection we will be happy to adjust the work plans and fees for each contract accordingly.*

### 3. NON-COLLUSION STATEMENT

**NON-COLLUSION STATEMENT:**

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

**Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.**

<u>NAME</u>	<u>RELATIONSHIPS</u>
N/A _____	N/A _____
_____	_____
_____	_____
_____	_____

**In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.**

## 4. LETTER OF INTEREST

# **BURTON & ASSOCIATES**

December 18, 2014

Procurement Services Division, Room 619  
City Hall  
100 North Andrews Avenue  
Fort Lauderdale, FL 33301

Re: RFP# 455-11533 – Stormwater Rate Study

Dear Members of the Selection Committee:

**Burton & Associates** is pleased to present this proposal to conduct a Stormwater Rate Study (Study) for the City of Fort Lauderdale, Florida (City). **Burton & Associates specializes in performing cost of service rate studies for local government utilities across the country and has performed nearly 1,000 of these studies throughout the United States.**

**Firm Experience & Local Knowledge** – For over 26 years, Burton & Associates has successfully provided rate and financial planning services to a variety of governmental utilities. We bring extensive experience in cost of service studies, financial forecasting, as well as the review and development of connection fees, deposits, and various financial policies. **Since 2008, we have provided an array of services to the City of Fort Lauderdale, including Utility Rate Studies, Financial Sustainability Analyses for the General Fund, and Revenue Sufficiency Analyses for several Special Funds.** We are currently finalizing updates to the Financial Sustainability Analysis for the General Fund and eight other Special Funds, including the Stormwater Fund.

Through our involvement with the City, including a 2011 Stormwater Rate Study, we have developed a keen understanding of the significant capital needs of the stormwater utility, and the challenges the Utility is facing in order to fund the required projects. **Also, as part of recent work we conducted for the City, we assisted City staff in evaluating the overall rate impact of the capital needs of the stormwater system and the potential bi-furcation and/or tri-furcation of the rates and funding structure to address differential benefits and costs to properties at greater risk due to elevation and/or proximity to tidal waters.** It was concluded that the magnitude of the capital needs, particularly after the initial phase, are such that the burden may be too large to recover the cost solely based on increasing the current level of the stormwater rates and that other funding strategies will need to be considered such as assessments, area specific surcharges, etc.

**Our Unique Approach** – We have developed a highly effective approach using our innovative modeling system, and we have used this approach and modeling process with the City to analyze the financial sustainability of the General Fund, other City utility funds and Special Funds, including the Stormwater Fund. Our approach will be to use our interactive Stormwater Rate Model to evaluate the alternative rate structures and the impact of each upon properties of various classes and sizes within the City. We will use GIS technology and FEMA Flood Maps to 1) define the high risk service areas relative to low

elevation and/or proximity to tidal waters, and 2) identify the parcels/accounts within these areas. We will then develop Stormwater Fee billing rolls for each alternative rate structure evaluated that will include all parcels/accounts within the City and the alternative rates/fees for each parcel for each rate structure alternative. We will also evaluate bi-furcation and/or tri-furcation of the service area relative to the above referenced risks and we will evaluate alternative funding strategies, to include but not necessarily be limited to area specific assessments and/or surcharges to reflect the differential costs associated with these increased risks above the basic stormwater fee.

During this process we will meet with City staff in **several interactive work sessions to review the results of the analysis**. During these work sessions, our Model will be up and running with the output presented on the control panel of the model on a large viewing screen. This will facilitate our ability to evaluate scenarios or “what if” analyses “on-the-fly” with the graphical results presented instantaneously on the control panel of the model. In this way we can work towards solutions through a continuous evaluation process on-the-spot during these interactive work sessions.

**GIS Sub-Consultant** – We are pleased to include McKim & Creed as a sub-consultant, and specifically Ms. Julie Willett, PLS, GISP, a Senior GIS Technician with McKim & Creed, on our project team. McKim & Creed offers a full range of engineering, surveying, and planning services. Core competencies of the firm include water and wastewater planning and design, site and civil engineering, hydraulic design, landscape architecture, structural engineering, GIS, and surveying specialties ranging from electronic data collection to hydrographic surveying, aerial photogrammetry, laser scanning and subsurface utility engineering. Ms. Willett has over 13 years of experience as a GIS analyst/specialist. Ms. Willett will provide GIS assistance to our project team throughout the project. We assume that the City’s Stormwater Master Plan consultants will provide cost data relative to required improvements, and McKim & Creed will assist our team in the coordination and assimilation of that cost data into our analysis.

**Authorized Representative** – Mr. Michael Burton and Mr. Andrew Burnham are authorized to bind Burton & Associates to all statements, services and prices contained in this proposal. Mr. Burton can be reached at 200 Business Park Circle, Suite 101, St. Augustine, FL 30925, by phone at (904) 247-0787 or via email at [mburton@burtonandassociates.com](mailto:mburton@burtonandassociates.com). Mr. Burnham will manage all work completed for this project out of our Tampa, FL office and can be reached at 1000 North Ashley Drive, Suite 513, Tampa, FL 33602, by phone at (813) 443-5138 or via email at [aburnham@burtonandassociates.com](mailto:aburnham@burtonandassociates.com).

**Summary** - We deliver superior services for an excellent price and we look forward to having the opportunity to be of service to the City. If you have any questions, or need any additional information, please do not hesitate to contact me.

Very truly yours,



Michael Burton  
President

## 5. STATEMENT OF PROPOSED SERVICES

This section contains our capability and approach to perform the scope of services, timeline for completion of the study, and qualifications of our project team.

### 5.1 CAPABILITY & APPROACH TO SCOPE OF SERVICE

As evidenced herein, Burton & Associates is highly qualified and capable to provide this stormwater rate study for the City. Based on our understanding of the City's needs, as discussed in Section 8, we are confident that the approach presented in this section will provide the City with a successful rate study.

This section presents an introduction to our empowering decision support process in which we use our proprietary interactive Financial Analysis and Management System (FAMS-XL®). **The interactive process allows us to work closely with our clients to conduct a transparent analysis and to clearly identify and understand the drivers of any necessary rate adjustments.**

To precisely simulate the dynamics of your stormwater system, we will review the configuration of your system, historical financial information and billing data, current operating and multi-year capital improvement budgets, facility master plans, existing financial policies/goals, current rate models, and other relevant data, and make adjustments to the FAMS-XL® functionality as required to replicate your stormwater system. **We will also make adjustments as identified during the study to address the requirements to identify properties at higher risk due to elevation and/or proximity to tidal waters, and to specify those areas for consideration of alternative funding strategies for the additional costs associated with attenuating those increased risks.**

We then conduct interactive decision support work sessions with City staff with our FAMS-XL® model up and running with the "control panel" projected on a large viewing screen. In this way we can evaluate alternative financial plan and rate scenarios with instantaneous feedback. This allows us to work with staff towards solutions while building consensus and confidence in the decision alternatives and the short and long term consequences of each.

As indicated herein, FAMS-XL® has several modules, all of which are, or can be, linked depending upon your specific requirements. This section describes the modules of FAMS-XL®, how they are used, their relationship to each other and the linkages that will provide a complete and comprehensive evaluation of all aspects of the financial management, rates, fees, and charges of your stormwater system. **Specific examples on how we will use the process for the City are included in Section 8 –Assessment of the City's Needs.**

#### 5.1.1 Revenue Sufficiency and Financial Planning Module

The modules of FAMS-XL® include a five and ten-year revenue sufficiency and financial planning module which is used to develop a sustainable long term financial business plan for the utility, including a projection of the annual revenue requirements of the system. **This module allows examination of alternative policies regarding capital funding sources, target debt service coverage levels, levels of operating and capital reserves, affordability, and other financial policies/goals that affect the financial**



**performance of the utilities and their future rate requirements.** In addition to evaluating financial goals and objectives, we can also evaluate scenarios regarding alternative growth rates, capital improvement spending programs, cost escalation factors, changes in usage patterns, and other variables that affect the financial performance of the respective utilities.

Results are displayed during “live interactive decision support work sessions” on the “control panel” of FAMS-XL© which displays results of not only the current scenario being evaluated, but also the last scenario against which the current scenario is being compared. This allows key participants in the interactive work sessions to clearly see the impacts of their alternative decision choices in terms of the financial consequences to the various financial parameters being tracked. Our experience is that the process helps key participants from our clients’ staff, such as personnel from finance, budgeting, engineering, operations, management and even elected officials, work towards solutions in an open environment. The result is consensus as to the solutions identified and confidence that all alternative solutions have been thoroughly evaluated.

As with all modules of FAMS-XL©, the revenue sufficiency and financial planning module will be adjusted during the study to precisely simulate the financial dynamics of each of the stormwater fund. We purposely have continued to expand the capabilities of FAMS-XL© on the Microsoft Excel© platform to allow us the flexibility to adjust our model to replicate the way our clients’ do business rather than the reverse.

### 5.1.2 Cost Allocation and Rate Design Modules

FAMS-XL© also includes a cost allocation and rate design module in which total revenue requirements will be allocated based upon appropriate allocation methods and factors for your system, and rates will then be developed based upon specific cost allocation and rate design criteria for each identified customer class. As mentioned previously, **sub-service areas will be identified using GIS technology FEMA maps and criteria related to property elevation and proximity to tidal waters to provide a framework within which to evaluate alternative funding strategies for the costs required to attenuate the additional risks in these sub-service areas.** We will identify the most appropriate cost of service allocation and rate structure methodologies for the City based upon its system configuration, the above referenced high risk sub-service areas, available data, resources, goals, and public policy objectives. We will then customize the cost allocation and rate design module to employ the identified methodologies and concepts based upon the City’s data.

Within each FAMS-XL© module, assumptions, sensitivities and alternatives can be quickly evaluated, with the results seen instantaneously on the “control panel” of each respective module during the interactive work sessions that we conduct with City staff. As described above, the control panel is a screen that displays results in terms of key financial and property impact parameters and also contains key input variables and toggles that allow quick examination of “what if” or alternative scenarios.

During this process, we will perform an independent review of the current rate structure to determine if it conforms to accepted industry practice and to determine if the current rates are fair and equitable for each class of customer. **We will also evaluate alternative rate structures, including rate structures that**

recognize the additional risks and associated attenuation costs for areas with low elevation and/or which are proximate to tidal waters. The objective being stormwater rates/fees which better serve the City’s needs, apportion costs to properties relative to risk, benefit and cost, and conform to the City’s public policy objectives, while ensuring a more fair and equitable distribution of costs while conforming to legal requirements.

**5.1.3 Linkages of FAMS-XL® Modules**

The revenue requirements determined in the revenue sufficiency and financial planning module for the first projected fiscal year are linked to the cost allocation and rate design module, which calculates specific rates necessary for each customer class to generate the required revenues based upon proper allocation of costs and the specified rate structure, or rate structure alternatives. **In instances such as this, where our clients desire a completely integrated analysis of all of the “moving parts” of the financial planning and rate making process, FAMS-XL® provides all of the required functionality and linkages within extremely flexible and robust modules that, combined with the empowering interactive decision support work sessions that we facilitate, provides unparalleled vision, clarity, and confidence in the short and long term financial management of your utility system.**

This integration is not limited to the revenue sufficiency module and the cost allocation and rate design module for the Stormwater Fund, because we also currently link the Stormwater Fund Revenue Sufficiency Model to the General Fund model in the General Fund Financial Sustainability work that we are conducting for the City under a separate contract. That linkage will continue to be available during this study to show the inter-fund impacts such as increased rate of return to the General Fund as stormwater assets are constructed.

**5.2 TIMETABLE**

We have prepared a preliminary project schedule that indicates project completion could occur within approximately 120 days of award of the contract. It is important to note that any educational outreach would be outside the scope of services, and as such, would occur outside of this timeline.

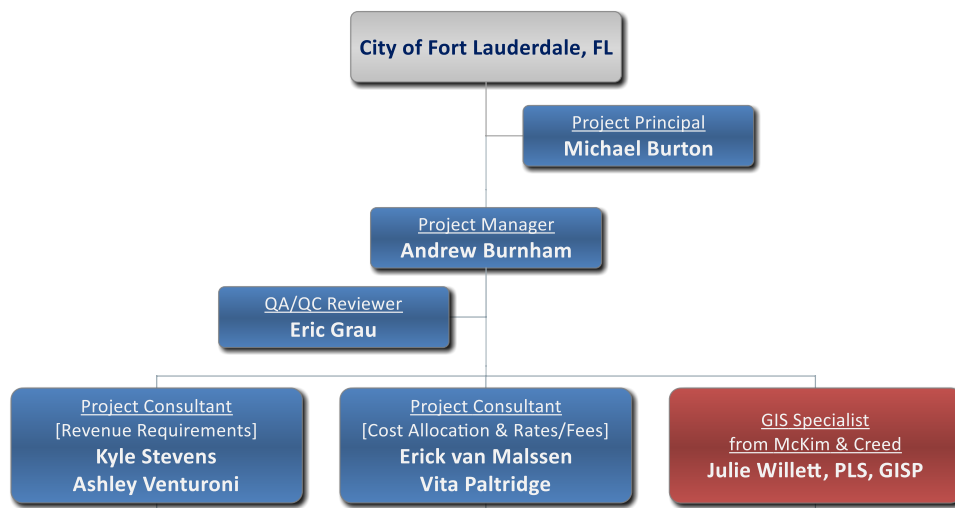
Tasks	Week																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Task 1 Update Ten Year Revenue Sufficiency Analysis for the Stormwater Utility Fund	█	█	█	█													
Task 2 Update Cost Allocation to Property Classes				█	█	█	█	█									
Task 3 Evaluate the Stormwater Rate Structure and Develop Stormwater Rates under up to three (3) alternative scenarios.								█	█	█	█	█					
Task 4 Present the Results to City Management and the City Commission.													█	█			
Task 5 Prepare a Report of the Results of the Study														█	█	█	█

### 5.3 QUALIFICATIONS OF STAFF

For over 26 years, the firm has provided independent and objective financial management services to local governments across the country, culminating in **nearly 1,000 separate analyses**. We have carefully selected our project team with members experienced in each service requested by the City, including:

- ✓ **Development of Multi-Year Financial Plans and Rate Programs**, for systems of similar size operated by local government agencies, including the integration of alternative financial policies, evaluation of alternative cost requirements, and testing of key assumptions/variables
- ✓ **Detailed Functional Cost of Service Allocations** with the expertise to analyze system configurations, facilities, plans, design criteria, usage characteristics, etc. in the context of allocating costs in order to establish fair and equitable rates for each class of customer
- ✓ **Rate/Fee Structure Concepts and Theory** and their practical application to address specific local policy objectives (such as affordability and conservation) while conforming to accepted industry practice and legal precedent (both nationally and locally)
- ✓ **Financial Policy Review** including the development of specific goals/targets relative to various types of reserves, cash balances, capital funding sources, debt levels, affordability, and other metrics recognizing industry standards/guidelines and local objectives
- ✓ **Capital Finance Plan Development and Support of the Issuance of Revenue Bonds**, including the preparation of financial feasibility studies and participation in the credit rating process
- ✓ **Review and Development of Capital Cost Recovery Charges and Miscellaneous Fees**, including impact fees, tap fees, hydrant fees and backflow prevention charges
- ✓ **Preparation of Public Education and Outreach Initiatives**, including information about the necessity of any rate adjustments, the drivers that cause them, and their impacts on customers

The organization chart below presents our proposed project team, including our engineering sub-consultant. Resumes for all project team members are presented on the following pages.



**SELECTED CLIENTS**

- City of Fort Lauderdale, FL
- City of North Port, FL
- City of Fort Myers, FL
- Ranger Drainage District, FL
- City of Clearwater, FL
- City of Lake Worth, FL
- City of Coral Springs, FL
- City of Chesapeake, VA
- Town of Front Royal, VA
- City of Baytown, TX
- Baytown Area Water Authority, TX
- Town of Gilbert, AZ
- City of Rockville, MD
- City of Columbia, MO
- St. Mary’s County Metropolitan Commission, MD
- City of St. Petersburg, FL
- Pinellas County, FL
- James City Service Authority, VA
- Seminole County, FL

**AREAS OF PRACTICE**

- Water Resources
  - *Stormwater*
  - *Water & Sewer*
  - *Reclaimed Water*
- Sanitation
- General Government
  - *Police & Fire/EMS*
  - *Parks & Recreation*
  - *Library*
  - *Roads*

**EDUCATION**

Bachelors of Industrial Engineering,  
1970, University of Florida,  
Gainesville, FL

# MICHAEL BURTON

**TITLE:** PRESIDENT

**OFFICE LOCATION:** ST. AUGUSTINE, FL

**YEARS OF EXPERIENCE:** 36

**YEARS WITH FIRM:** 26

**PROJECT ASSIGNMENT**

As a Project Principal, Mr. Burton will have overall responsibility for successful completion of the project and he provide general oversight of the concepts and methodologies used in the analysis. He will also serve as a supplemental project manager to guarantee that a senior member of our staff is available to the City at all times.

**GENERAL QUALIFICATIONS**

Mr. Burton has over 35 years of utility financial planning and rate experience for stormwater, water, wastewater, reclaimed water, solid waste, and recycling systems. He served for seven years on the AWWA Rates and Charges Committee where he co-authored AWWA Manual M54 - Developing Rates for Small Systems.

Mr. Burton has **personally conducted and/or managed nearly 700 water resources utility rate studies**, and he has extensive experience performing cost of service studies for a variety of utility systems employing accepted industry practices that best match the specific system parameters and resources of each respective community.

**SPECIALTY**

Mr. Burton specializes in providing the following services:

- Stormwater System Innovative Rate/Fee design
- Design of Financial Management and Rate Programs
- Development of Infrastructure Financing Programs & Cost Recovery Mechanisms
- Development of User Charges
- Impact Fee Studies
- Financial Advisory & Feasibility Services for Assistance in the Issuance of Revenue Bonds
- Rate Regulation Assistance to Jurisdictional Counties
- Water Resources Planning, Including Alternative Water Supply

#### SELECTED CLIENTS

- City of Fort Lauderdale, FL
- City of Fort Myers, FL
- City of North Port, FL
- City of Palmetto, FL
- Brunswick-Glynn Joint Water & Sewer Commission, GA
- Town of Gilbert, AZ
- City of Baytown, TX
- City of Chesapeake, VA
- City of Columbia, MO
- City of Rockville, MD
- Livingston County, MI
- Diamondhead Water & Sewer District, MS
- City of St. Petersburg, FL
- Pinellas County, FL
- Decatur Utility, AL
- James City Service Authority, VA
- Town of Cary, NC
- Town of Lexington, SC

#### AREAS OF PRACTICE

- Water Resources
  - *Water & Sewer*
  - *Reclaimed Water*
  - *Stormwater*
- Sanitation
- General Government
  - *Police & Fire/EMS*
  - *Parks & Recreation*
  - *Library*
  - *Roads*

#### EDUCATION

Bachelors of Business Administration, 2000, Lake Superior State University, Sault Ste. Marie, MI; graduated Magna cum Laude

## ANDREW BURNHAM

**TITLE:** SENIOR VICE PRESIDENT

**OFFICE LOCATION:** TAMPA, FL

**YEARS OF EXPERIENCE:** 14

**YEARS WITH FIRM:** 11

#### PROJECT ASSIGNMENT

As Project Manager, Mr. Burnham will be responsible for the management and success of all work performed under this contract. He will attend and facilitate all meetings and public presentations.

#### GENERAL QUALIFICATIONS

Mr. Burnham managed our recent Stormwater Rate Study for the City of Fort Lauderdale. Andy has extensive experience in utility financial planning, cost allocation, and rate development, during which he has been recognized as an industry expert as part of utility rate-related regulatory proceedings in multiple states and territories. He has personally conducted and/or managed over 500 similar studies for local governments since joining Burton & Associates, and has supported our clients in the issuance of over \$500 million of municipal bonds for capital improvement funding just since 2011. Mr. Burnham is currently serving on the AWWA Rates and Charges Committee, and is actively involved in an update to AWWA Manual M1 – Principles of Water Rates, Fees and Charges.

#### SPECIALTY

Mr. Burnham specializes in providing the following services:

- Stormwater Rate Studies
- Long-Term Financial Plan Development
- Cost of Service and Cost Allocation Analysis
- Rate Structure Design & Rate Studies
- Development of Impact Fees
- Development of Capital Finance Plans
- Bond Feasibility Reports and State Loan Applications
- Analysis of the Acquisition and/or Sale of Utility Systems
- Expert Witness Testimony Services
- Stakeholder Communication/Education Programs
- Assistance with the Preparation of Ordinances, Inter-local Agreements, and Regulatory Applications

#### SELECTED CLIENTS

- City of Fort Lauderdale, FL
- City of North Port, FL
- City of Cocoa, FL
- City of Tarpon Springs, FL
- Town of Gilbert, AZ
- City of Clearwater, FL
- City of Cape Coral, FL
- Orange Water & Sewer Authority, NC
- City of New Port Richey, FL
- City of Lake Worth, FL
- City of Port St. Joe, FL
- City of Port Richey, FL
- Front Royal, VA
- Toho Water Authority, FL

#### AREAS OF PRACTICE

- Water Resources
  - *Water & Sewer*
  - *Reclaimed Water*
  - *Stormwater*
- Sanitation
- General Government
  - *Fire/EMS*
  - *Parks & Recreation*
  - *Library*
  - *Roads*

#### EDUCATION

Masters of Business Administration, 2005, University of Central Florida, Orlando, FL

Bachelors of Science in Business Administration, Concentration in Finance, 2004, University of Central Florida, Orlando, FL

## ERICK VAN MALSSSEN

**TITLE:** MANAGER

**OFFICE LOCATION:** ST. AUGUSTINE, FL

**YEARS OF EXPERIENCE:** 10

**YEARS WITH FIRM:** 6

#### PROJECT ASSIGNMENT

As a Project Consultant for this Study, Mr. van Malssen will be responsible for developing the cost allocation and rate design models, and recommending alternative rate structures.

#### GENERAL QUALIFICATIONS

Mr. van Malssen is a Manager with Burton & Associates. Erick has over ten years of utility rate experience, including six years with Burton & Associates. During his time at Burton & Associates, Erick has participated in several types of utility rate and cost apportionment analyses. He has superior financial, business, and analytical skills and has continuously provided our clients with exemplary financial analysis based upon applications of sound financial and economic concepts.

He has strong Excel modeling skills and has experience working with large data sets and financial models, including our proprietary interactive FAMS© model and specific rate, user charge, and assessment modules.

#### SPECIALTY

Mr. van Malssen specializes in providing the following services:

- Long-Term Financial Plan Development
- Cost of Service, Cost Allocation & Rate Studies
- Development of Impact Fees
- Development of Specific Service Charges
- Development of Capital Finance Plans
- Bond Feasibility Reports & State Loan Applications
- System & Property Valuation and Analysis
- Operations and Performance Reviews, Strategic Planning, Financial Feasibility Analyses, and Annexation Analyses
- Analysis of the Acquisition and Sale of Utility Systems
- Customer, Demand, and Revenue Forecasts
- Stakeholder Outreach/Educations Programs

#### SELECTED CLIENTS

- Brevard County, FL
- Town of Cary, NC
- City of Manistee, MI
- City of St. Petersburg, FL
- Pinellas County, FL
- City of Tarpon Springs, FL
- City of Columbia, MO
- City of Baytown, TX
- City of Clearwater, FL
- City of Rockville, MD
- City of Mount Dora, FL
- City of Dunedin, FL
- City of Palmetto, FL
- City of Sarasota, FL
- City of St. Cloud, FL
- City of Cocoa , FL
- City of Lynn Haven, FL
- Seminole County, FL
- Nassau County, FL
- City of Fernandina Beach, FL

#### AREAS OF PRACTICE

- Water Resources
  - *Water & Sewer*
  - *Reclaimed Water*
  - *Stormwater*
- Sanitation
- General Government
- *Fire/EMS*

#### EDUCATION

Bachelor of Science in Finance, 2004,  
University of Florida, Gainesville, FL;  
Graduated Cum Laude

## ERIC GRAU

**TITLE: MANAGER**

**OFFICE LOCATION: ST. AUGUSTINE, FL**

**YEARS OF EXPERIENCE: 10**

**YEARS WITH FIRM: 10**

#### PROJECT ASSIGNMENT

As a QA/QC Reviewer, Mr. Grau will be responsible for the overall quality and accuracy of all services and work products provided to the City. He will conduct regular internal reviews to ensure accuracy in our models and work products.

#### GENERAL QUALIFICATIONS

Mr. Grau is a Manager with Burton & Associates. He has over ten years of experience in providing cost of service allocation analyses, long-term financial planning and sustainability analyses, development and evaluation of alternative rate structures, as well as the development of capacity charges for water, wastewater, reclaimed water, stormwater, solid waste, and recycling utility systems, and he has participated in or managed over 200 such studies during his time at Burton & Associates. Eric has superior financial, business, and analytical skills, and has provided our consulting practice with exceptional financial analyses based upon applications of sound financial and economic concepts with an unparalleled attention to detail.

Eric is skilled in the use of our proprietary interactive FAMS© model and his technical skills have enhanced our interactive process. He has provided our clients with exceptional problem solving analytics and a streamlined approach to financial planning and rate making.

#### SPECIALTY

Mr. Grau specializes in providing the following services:

- Long-Term Financial Plan Development
- Cost of Service, Cost Allocation & Rate Studies
- Development of Impact Fees
- Development of Capital Finance Plans
- Bond Feasibility Reports & State Loan Applications
- Annexation & Service Area Expansion Analysis
- Customer, Demand, and Revenue Forecasts

#### SELECTED CLIENTS

- City of Cape Coral, FL
- City of Cocoa , FL
- City of Casselberry, FL
- City of Plant City, FL
- City of Bonita Springs, FL
- Seminole County, FL
- Town of Port Richey, FL
- City of Clearwater, FL
- City of Lake Worth, FL
- City of Venice, FL
- City of Baytown, TX
- Baytown Area Water Authority, TX
- Orange County, FL
- Brunswick-Glynn Joint Water & Sewer Commission, GA
- City of Columbia, MO
- City of Rockville, MD
- City of Tarpon Springs, FL
- Town of Cary, NC

#### AREAS OF PRACTICE

- Water Resources
  - *Water & Sewer*
  - *Reclaimed Water*
  - *Stormwater*
- General Government
  - *Fire Rescue Service*

#### EDUCATION

Bachelor of Science in Business Administration, 2008, University of Florida, Gainesville, FL

## ASHLEY VENTURONI

**TITLE:** CONSULTANT

**OFFICE LOCATION:** TAMPA, FL

**YEARS OF EXPERIENCE:** 6

**YEARS WITH FIRM:** 6

#### PROJECT ASSIGNMENT

As a Project Consultant for this Study, Ms. Venturoni will develop the financial forecasting models, including alternative five and ten-year financial management plan for the stormwater system.

#### GENERAL QUALIFICATIONS

Ms. Venturoni is a Consultant with Burton & Associates. She has 6 years of experience with Burton & Associates providing utility rate and financial services.

She has superior financial, business, and analytical skills and has experience in performing day to day project activities, including scheduling, budgeting and client meetings.

She has strong Excel modeling skills and is experienced in developing financial models, and in working with our proprietary interactive FAMS© model. She has developed multi-year financial management plans inclusive of annual revenue requirements and rate adjustments for a variety of utility systems.

#### SPECIALTY

Ms. Venturoni specializes in providing the following services:

- Long-Term Financial Plan Development
- Rate Structure Design & Rate Studies
- Development of Capital Finance Plans
- Bond Feasibility Reports
- Customer, Demand, and Revenue Forecasts
- Cost of Service, Cost Allocation & Rate Studies
- Comparative Rate Surveys



#### SELECTED CLIENTS

- City of Fort Lauderdale, FL
- City of Naples, FL
- City of Fort Myers, FL
- City of Gilbert, AZ
- Gateway Services District, FL
- St. Mary's County Metropolitan Commission, MD
- City of Rockville, MD
- City of Dunnellon, FL
- City of Cocoa, FL
- City of Columbia, MO
- James City County, VA
- Town of Cary, NC
- City of Carson City, MI

#### INDUSTRIES

- Water Resources
  - *Stormwater*
  - *Water & Sewer*
  - *Reclaimed Water*
- General Government
  - *Fire Rescue Service*
  - *Solid Waste*
  - *Special Revenue Funds, including Airport, Parking, Building*

#### EDUCATION

Master in Economics, 2010,  
Florida State University,  
Tallahassee, FL

Bachelors in Economics, 2008,  
Florida State University,  
Tallahassee, FL

## KYLE STEVENS

**TITLE:** PROJECT ANALYST

**OFFICE LOCATION:** TAMPA, FL

**YEARS OF EXPERIENCE:** 2

**YEARS WITH FIRM:** 2

#### PROJECT ASSIGNMENT

As a Project Consultant for this Study, Mr. Stevens will develop the financial forecasting models, including alternative five and ten-year financial management plan for the stormwater system.

#### GENERAL QUALIFICATIONS

Mr. Stevens is a Project Analyst with Burton & Associates. He participated in our recent General Fund Sustainability Study for Fort Lauderdale and updated the Stormwater Revenue Sufficiency Analysis Model and several other enterprise and special revenue funds. He has two years of experience with Burton & Associates providing financial services, including the development and update of stormwater fees, fire assessment fees and the analysis of other taxing/fee programs.

He has strong Excel modeling skills and is experienced in developing financial models, and in working with our proprietary interactive FAMS-XL© model.

#### SPECIALTY

Mr. Stevens specializes in providing the following services:

- Long-Term Financial Plan Development
- Cost of Service, Cost Allocation & Rate Studies
- Development of Impact Fees
- Development of Specific Service Charges
- Development of Capital Finance Plans
- System & Property Valuation and Analysis
- Operations and Performance Reviews, Strategic Planning, Financial Feasibility Analyses, and Annexation Analyses
- Analysis of the Acquisition and Sale of Utility Systems
- Customer, Demand, and Revenue Forecasts

#### SELECTED CLIENTS

- City of Cocoa, FL
- City of Clearwater, FL
- City of Fernandina Beach, FL
- Marion County, FL
- City of Tarpon Springs, FL
- Okaloosa County, FL
- City of Casselberry, FL
- City of Gilbert, AZ
- BVU Authority, VA
- City of Lynn Haven, FL
- City of Dunnellon, FL
- City of Wauchula, FL
- City of Mount Dora, FL
- City of Edgewater, FL
- City of Palmetto, FL
- City of Columbia, MO
- Town of Longboat Key, FL
- City of Dunedin, FL
- Lake St. Charles Community Development District, FL

#### INDUSTRIES

- Water Resources
  - *Water & Sewer*
  - *Reclaimed Water*
  - *Stormwater*
- General Government
  - *Fire Rescue Service*
  - *Solid Waste*

#### EDUCATION

Bachelor of Science in International Economics, 2002, Florida Atlantic University, Boca Raton, FL

Masters of Business Administration in Finance, 2010, Nova Southeastern University, Davie, FL

## VITA PALTRIDGE

**TITLE:** PROJECT ANALYST

**OFFICE LOCATION:** ST. AUGUSTINE, FL

**YEARS OF EXPERIENCE:** 2

**YEARS WITH FIRM:** 2

#### PROJECT ASSIGNMENT

As a Project Consultant for this Study, Ms. Paltridge will work with Mr. van Malssen to develop the cost allocation and rate design models.

#### GENERAL QUALIFICATIONS

Ms. Paltridge is a Project Analyst with Burton & Associates. She has two years of experience with Burton & Associates providing financial services, including the development and update of fire assessment fees and the analysis of other taxing/fee programs.

She has superior financial, business, and analytical skills and has experience in performing day to day project activities, including scheduling, budgeting and client meetings.

She has strong Excel modeling skills and is experienced in developing financial models, and in working with our proprietary interactive FAMS© model.

#### EXPERIENCE

Vita's experience includes serving as Project Analyst in the following areas:

- Development of Assessment Program Methodologies and Assessments/Fees
- Long-Term Financial Plan Development
- Rate Structure Design & Rate Studies
- Cost of Service, Cost Allocation & Rate Studies
- Customer, Demand, and Revenue Forecasts
- Comparative Rate Surveys



Julie Willett, PLS, GISP  
Senior GIS Technician

### Fields of Specialization

Geographic Information Systems  
Esri ArcGIS  
Utility Inventory Geodatabase Design  
GIS Data Development  
Web Mapping  
3D GIS Modeling

### Education

M.A.S., Geographic Information Systems, Arizona State University  
B.I.S., Environmental Geography, Virginia Commonwealth University  
B.A., Studio Art, Virginia Polytechnic Institute and State University

### Professional Licensure

GISP Certification from the GIS Institute  
Professional Land Surveyor, NC

### Summary

Ms. Willett has over 13 years' experience as a GIS analyst/specialist. Her main responsibilities are managing, creating and editing spatial data. She specializes in developing utility inventory GIS data through field collection of above ground utility assets, record verification and conversion of existing data formats into GIS. Ms. Willett maintains a company-wide GIS data library of base mapping data and project specific data. She assists engineering and surveying staff with maps for field purposes, data analysis and report figures. Recently, Ms. Willett has begun developing Arc GIS Online with web mapping and data feature services for mobile data editing. This new technology allows users to take the data to the field easily. Working in conjunction with the subsurface utility engineering and surveying groups, Ms. Willett has also created 3-D GIS models of underground infrastructure.

### Selected Project Experience

**GIS Water/Wastewater Utility Data Development, City of Safety Harbor, FL.** Ms. Willett served as project manager in the completion of a six-month collection of the City of Safety Harbor's utility network. Each water, stormwater, and wastewater aboveground feature was mapped with a GPS unit to mapping grade accuracy. A GIS data layer of each network was created from the surface point feature. Once complete, the City had an accurate inventory of their utility network in one central location, providing the ability to quickly locate those features. The system-wide GIS display and analysis capabilities enhanced daily operations, saved time by eliminating the effort to track down archived information, and simplified current maintenance procedures.

**Stormwater GIS Conversion, City of Greensboro, NC.** Ms. Willett provided professional GIS data migration services for the City of Greensboro's existing stormwater utility inventory. The project consisted of three phases. Phase I involved a complete citywide stormwater inventory review so that any challenges during the migration task would be fully understood from the project onset. Phase II was a thorough updating of the existing stormwater database design from a legacy system to the new ArcGIS suite of products. And finally, Phase III consisted of a variety of data migration tasks such as: review of Mylar black sheets for QA/QC, establishment of feature photo hotlinks, post- processing and personal geodatabase development.

**Stormwater System Feature Inventory Mapping, Town of Kure Beach, NC.** Ms. Willett developed a geographic information system (GIS)-based spatial inventory of the stormwater features, which in the Town of Kure Beach consists mainly of ditches, swales, street culverts, lakes, ponds, and spillways. This project help provide the Town with a means of assessing the condition of the stormwater system and direct repair and maintenance as needed to minimize probability of flooding conditions and pollution of the local receiving waters. The project also helped to identify trouble areas prone to flooding and/or water pollution; support future modeling efforts that may be undertaken to forecast the potential damage from major flooding during episodic storm events, and provided a means of assessing infrastructure asset value should the need arise as is the case of municipalities that are held to the standards of the Government Accounting Standards Board (GASB) Statement 34.

## 6. BUSINESS LICENSES

# *State of Florida Department of State*

I certify from the records of this office that BURTON & ASSOCIATES, INC. is a corporation organized under the laws of the State of Florida, filed on March 13, 1995.

The document number of this corporation is P95000020795.

I further certify that said corporation has paid all fees due this office through December 31, 2014, that its most recent annual report/uniform business report was filed on January 16, 2014, and its status is active.

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

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Sixteenth day of January, 2014*



*Ken Detjmer*  
**Secretary of State**

Authentication ID: CC7870681348

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

<https://efile.sunbiz.org/certauthver.html>


THIS RECEIPT IS ISSUED PURSUANT TO COUNTY ORDINANCE 87-36

### 2014/2015 ST. JOHNS COUNTY LOCAL BUSINESS TAX RECEIPT

**MUST BE DISPLAYED IN A CONSPICUOUS PLACE**

ACCOUNT 27441  
Expires September 30, 2015

**EXPIRES**

<b>TYPE OF BUSINESS</b>	000107 CONSULTANT		<input checked="" type="checkbox"/> <b>NEW BUSINESS TRANSFER - ORIGINAL TAX</b>	22.00
<b>BUSINESS ADDRESS</b>	200 BUSINESS PARK CIRCLE STE 101 ST AUGUSTINE, FL 32095		<b>AMOUNT</b>	22.00
<b>BUSINESS NAME</b>	<b>BURTON &amp; ASSOCIATES INC</b>	<b>PENALTY</b>	00	
<b>OWNER</b>	BURTON MICHAEL E	<b>COLLECTION COST</b>	22.00	
<b>MAILING ADDRESS</b>	200 BUSINESS PARK CIRCLE SUITE 101 ST AUGUSTINE FL 32095	<b>TOTAL</b>		22.00

**DENNIS W. HOLLINGSWORTH**  
**ST. JOHNS COUNTY TAX COLLECTOR**


This receipt does not constitute a franchise, an agreement, or permission or authority to perform the services or operate the business described hereon when a franchise agreement, or other county commission, state or federal permission of authority required by county, state or federal law.

THIS FORM BECOMES A RECEIPT ONLY WHEN VALIDATED  
**PAID-6002156-0001-0001 501 07/16/2014 22.00**

<p>2014 - 2015 HILLSBOROUGH COUNTY BUSINESS TAX RECEIPT</p> <p>OCC. CODE 280.052008 Public service</p>	<p><b>EXPIRES SEPTEMBER 30, 2015</b></p> <p>4 Employees</p>	<p>ACCOUNT NO. 267684</p> <p>RENEWAL</p> <p>Receipt Fee 22.00 Hazardous Waste Surcharge 0.00 Law Library Fee 0.00</p>
<h1>2014 - 2015</h1>		
<p><b>BUSINESS</b> BURTON &amp; ASSOCIATES 1000 N ASHLEY DR STE 513 TAMPA, FL 33602</p> <p><b>NAME</b> BURTON &amp; ASSOCIATES <b>MAILING ADDRESS</b> 1000 N ASHLEY DR STE 513 TAMPA, FL 33602</p>	<p>Paid 13-0-005963 07/10/2014 22.00</p>	
<p><b>BUSINESS TAX RECEIPT</b> DOUG BELDEN, TAX COLLECTOR 813-635-5200</p> <p><small>HAS HEREBY PAID A PRIVILEGE TAX TO ENGAGE IN BUSINESS, PROFESSION, OR OCCUPATION SPECIFIED HEREON</small></p> <p><b>THIS BECOMES A TAX RECEIPT WHEN VALIDATED.</b></p>		

Receipt #2015000001		Control No. 399109		<p><b>2015 CITY OF TAMPA TAX RECEIPT BUSINESS TAX DIVISION</b></p>
For Period Commencing <b>JULY 1ST, 2014</b>		and ending <b>SEPTEMBER 30, 2015</b>		
Total: <b>\$227.04</b>	Dated: <b>07-10-2014</b>	Application No. <b>0</b>		
<p><small>This Business Tax Receipt does not permit the holder to operate in violation of any City Law or Ordinance including, but not limited to, Zoning and other land use regulations. If in doubt, the holder should verify that he or she has the appropriate zoning by calling the Office of Land Development Coordination at (813) 274-8405. This Business Tax Receipt must be conspicuously posted in place of business.</small></p>				
Classification	Description	Amount		
993000 3010	ADMIN HANDLING FEE ADM OFFICE-1 TO 5 WORKER	\$10.00 \$217.04		
Business Name and Address		Business Name and Location		
BURTON AND ASSOCIATES 1000 N ASHLEY DR APT 513 TAMPA, FL, 33602		BURTON AND ASSOCIATES 1000 N ASHLEY DR STE 513 TAMPA, FL, 33602		

## 7. EVIDENCE OF INSURANCE

		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		OP ID: PE
				DATE (MM/DD/YYYY) <b>04/11/14</b>
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p><b>IMPORTANT:</b> If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>				
<b>PRODUCER</b> Fanelli-Harley-Harper & Assoc Suite 101 42 E. Lancaster Avenue Paoli, PA 19301 Kenneth R. Schultz		610-995-9100 610-995-9107		<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): E-MAIL: ADDRESS: PRODUCER CUSTOMER ID #: <b>BURTO-1</b>
<b>INSURED</b> Burton & Associates, Inc. Attn: Michael Burton 200 Business Park Circle, #101 Saint Augustine, FL 32095		<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
		INSURER A : <b>Hartford Casualty Ins. Co.</b>		<b>29424</b>
		INSURER B : <b>Twin City Fire Ins. Co.</b>		<b>29459</b>
		INSURER C : <b>AmGuard Insurance Company</b>		<b>42390</b>
		INSURER D :		
		INSURER E :		
		INSURER F :		

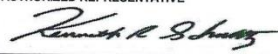
  

<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b>		<b>REVISION NUMBER:</b>		
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.						
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR   WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR		39 SBM IP 0799	01/21/14	01/21/15	EACH OCCURRENCE \$ <b>1,000,000</b>
	<input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC					DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>300,000</b>
						MED EXP (Any one person) \$ <b>10,000</b>
						PERSONAL & ADV INJURY \$ <b>1,000,000</b>
						GENERAL AGGREGATE \$ <b>2,000,000</b>
						PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b>
						\$
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS		39 SBM IP 0799	01/21/14	01/21/15	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b>
						BODILY INJURY (Per person) \$
						BODILY INJURY (Per accident) \$
						PROPERTY DAMAGE (Per accident) \$
						\$
						\$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DEDUCTIBLE RETENTION \$	<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE				EACH OCCURRENCE \$
						AGGREGATE \$
						\$
						\$
C	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N <input type="checkbox"/> N / A	BUWC 553073	01/21/14	01/21/15	<input checked="" type="checkbox"/> WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER
						E.L. EACH ACCIDENT \$ <b>1,000,000</b>
						E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b>
						E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>
B	<b>Errors/Omissions</b>		PG 0261365	01/21/14	01/21/15	Occur. \$ <b>3,000,000</b>
						Aggregate \$ <b>3,000,000</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required) For Proposal Purposes Only	
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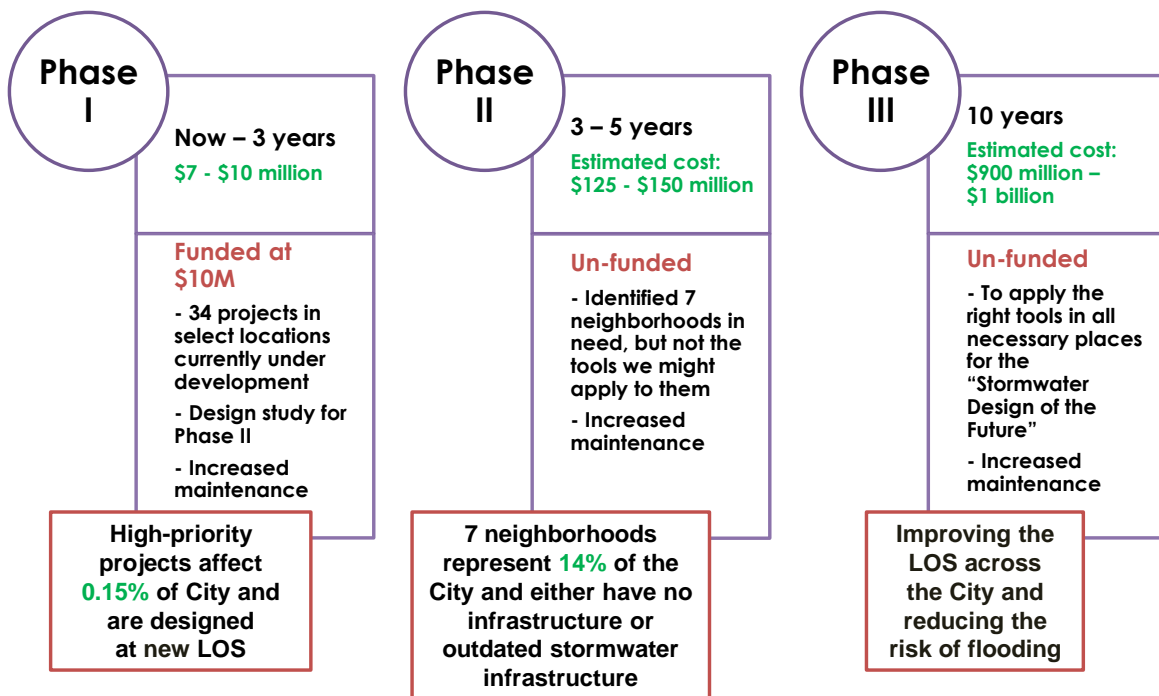
<b>CERTIFICATE HOLDER</b>  BURTONA  Burton & Assoc., Inc. Suite 101 200 Business Park Circle St. Augustine, FL 32095	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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## 8. ASSESSMENT OF CITY'S NEEDS

We have provided financial consulting services for the City since 2008, and during that time, we have analyzed several of the City's utility enterprise funds, including the stormwater fund, and the General Fund. We are very familiar with the utility systems, including stormwater, water and sewer and have valuable background knowledge to assist the City in conducting the requested stormwater rate study.

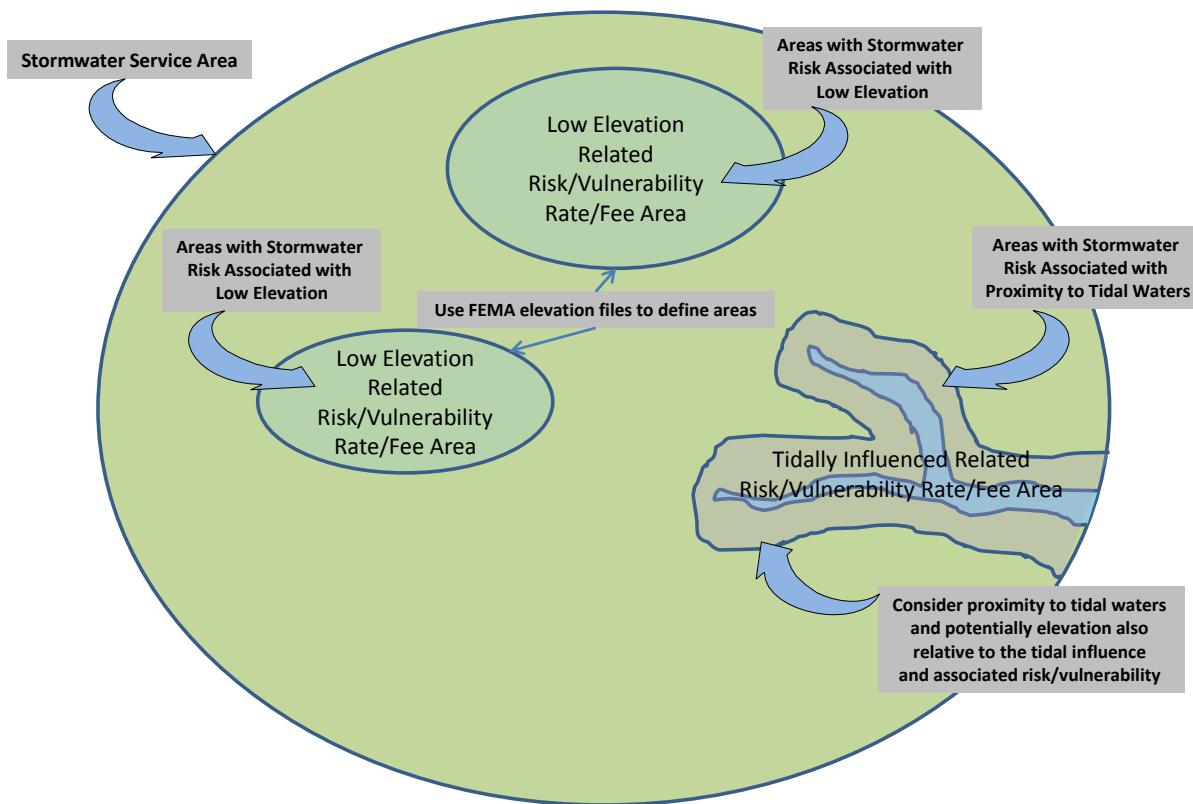
In fact, we conducted a Stormwater Rate Study in 2011 to update the allocation of costs to the various property types based on the recently updated Master Plan. The Master Plan identified a significant level of capital needs to improve and maintain the stormwater infrastructure. The rate study identified alternative combinations for enhanced maintenance and capital improvements, including neighborhood specific rates, but resulted in the need for significant rate increases which were not palatable to the Commission at that time. Since that time, we have updated the financial plan for the stormwater system, but have not included the significant capital needs of the system identified in the master plan in anticipation of this comprehensive rate study.

In addition, we recently participated in a meeting with stakeholders, including City staff, management and community representatives. We conducted an analysis of the ability to fund the capital needs of the stormwater system (approximately \$1 billion over three phases) as presented in the chart below, and performed a high level forecast of the rates and debt required to pay for the projects.



The stakeholders were in agreement about the seriousness of the issues, especially for those in high risk areas, but there was recognition that there will likely be strong resistance to raising rates/fees. It was generally acknowledged that alternative funding options will need to be considered to address the extensive capital needs over all three phases, and that differential rates, or other revenue mechanisms such as assessments or surcharges, should be evaluated for high risk areas based on the risk-level and need of each of the areas that exhibit higher risks.

During this process we performed a pilot level GIS analysis of the City, using FEMA maps, which identified neighborhoods and associated parcels that would be at higher risk for flooding, including low elevation areas and areas located near tidal waters. This analysis will be extended throughout the service area during this project. We have developed a conceptual schematic, presented below, that demonstrates the risk based approach and the potential need to bi-furcate or tri-furcate the stormwater rate structure based upon risk and associated costs to more fairly and equitably address the costs necessary to attenuate the higher risk in areas with lower elevations and/or proximity to tidal waters.





## 8.1 EXAMPLES OF BURTON & ASSOCIATES' MODELING PROCESS

Examples of the control panel of FAMS-XL© used in the interactive work sessions for the development of a ten-year financial plan for the City's Stormwater System in FY 2013 and then in FY 2014 are presented below. In the examples, the green bars and panels represent the "last" scenario evaluated, which in each example was "saved" as the current scenario. In the interactive work sessions, as assumptions and/or variables are adjusted the green bars remain static and the blue bars adjust to reflect the results of the new scenario. In this way side-by-side comparisons of scenarios can be instantaneously evaluated during these work sessions.

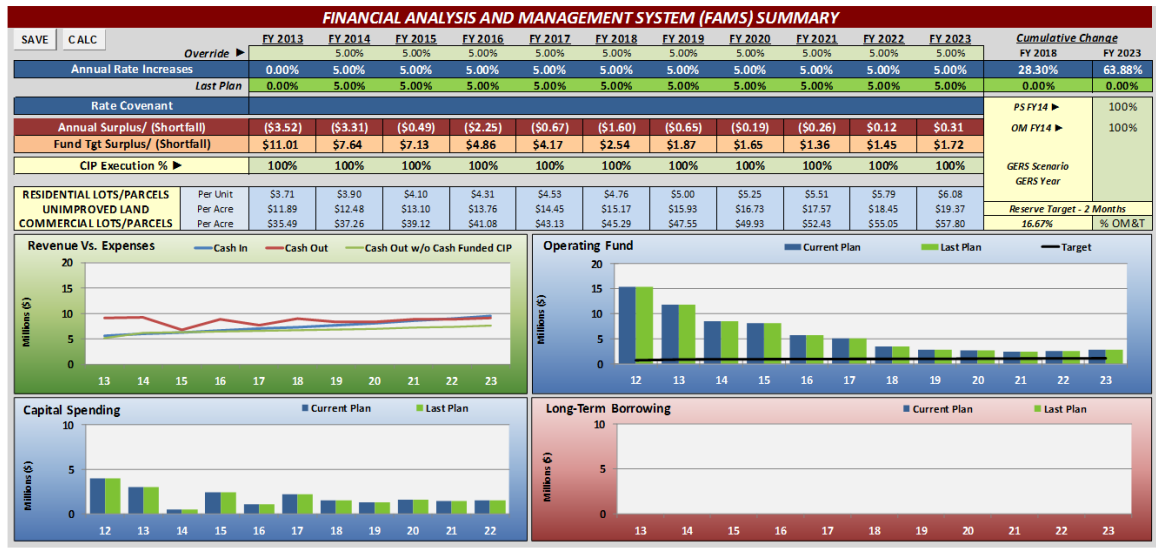
It is interesting to note that in the FY 2013 control panel, the Capital Spending graph, in the lower left of the control panel, does not reflect the extensive capital requirements identified in the Master Plan. Consequently, annual rate adjustments of 5% provide for financial sustainability over the ten year forecast.

However, in the Control Panel for FY 2014, the Capital Spending graph includes the first phase projects from the Master Plan. Clearly the 5% annual rate adjustments would not be sufficient to fund these requirements, so, in concert with City staff, we developed a *potential* plan of annual rate adjustments that would increase the residential stormwater fee about \$2.00 per month through FY 2018, and \$3.00 per month from FY 2019 through FY 2023. It interesting to note that this example shows a build-up of reserve balances in the out-years of the plan in the upper right graph. This shows the ability of this plan to fund additional capital requirements in those out-years with the above referenced reserve fund balances.

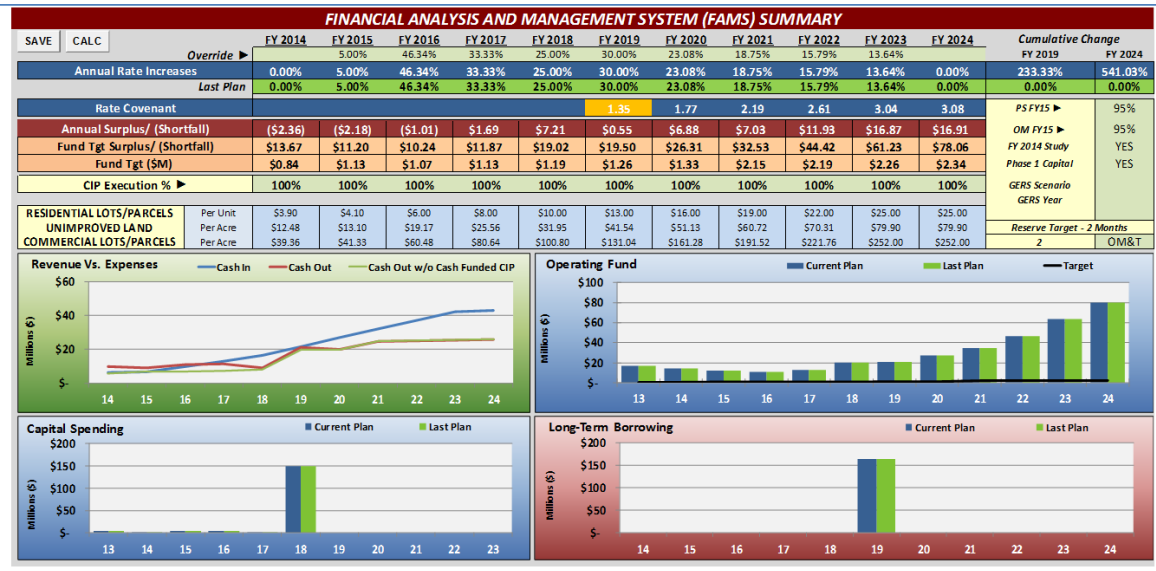
This plan was not presented to the Commission as the 5% rate adjustment for FY 2015 had already been approved, so no action was taken based upon this plan; but, this type of analysis will be required in FY 2015 to develop a sustainable plan for subsequent years. Also, alternative revenue sources and the aforementioned bi-furcation or tri-furcation of the rate structure based upon risk will be considered during the FY 2015 analysis. Such an approach could reduce the level of annual rate adjustments in the "Base" stormwater fee due to apportioning high risk attenuation costs to those service areas benefiting in the attenuation of their higher risk.

In the work plan included herein, we propose to execute such a combined approach to the ten year revenue sufficiency analysis and the potential re-structuring of the rates to reflect such considerations of higher risks and costs.

**FY 2013 – Fort Lauderdale Stormwater System**



**FY 2014 – Fort Lauderdale Stormwater System**



Similarly, during the interactive work sessions for cost allocation and rate design, a detailed property impact analysis is prepared that quantifies the impact upon properties of alternative rate structures in the sub-service areas discussed previously. In this way, City staff will have a complete picture of the impact upon 1) properties that only will be charged the “Base Rate/Fee”, and 2) properties in portions of the service area that have higher risk due to elevation and/or proximity to tidal waters that will include either higher stormwater fees and/or alternative revenue mechanisms, such as assessments.

## 8.2 DETAILED PROJECT APPROACH

Based on our understanding of the current state of the stormwater system and the objectives of the RFP, we have developed the following project work plan in order to develop a Stormwater Rate Model to evaluate alternative rates structures and their impacts to various property types.

### **Task 1: Update Ten Year Revenue Sufficiency Analysis for the Stormwater Utility Fund**

- 1.1 Update Burton & Associates proprietary FAMS-XL© models to reflect changes in circumstances and costs for each enterprise fund, run the models, and produce preliminary output.
- 1.2 Prepare alternative scenarios, data issues, and agenda for interactive review session with City staff.
- 1.3 Meet with City staff in two (2) interactive work sessions to review the results.
- 1.4 Make adjustments as required based upon input in the prior sub-task.

### **Task 2: Update Cost Allocation to Property Classes**

- 2.1 Develop cost allocation spreadsheet and identify appropriate allocation criteria for each cost category.
- 2.2 Define relative stormwater runoff factors by property class using impervious and pervious area data from the property data and runoff coefficients from the most recent Stormwater Master Plan.
- 2.3 Obtain, evaluate and compile data necessary to allocate costs and develop stormwater rates.
- 2.4 Populate cost allocation spreadsheet and develop appropriate cost allocations to property classes based upon output from the prior sub-tasks.
- 2.5 Review cost allocations with City staff via Go-to-Meeting conference and adjust as appropriate.

### **Task 3: Evaluate the Stormwater Rate Structure and Develop Stormwater Rates under up to three (3) alternative scenarios.**

- 3.1 Identify alternative stormwater rate structure scenarios to be considered or evaluated to include an additional rate or other revenue generation component for areas of high risk vulnerability, such as low elevation areas and areas proximate to tidal waters.
- 3.2 Evaluate the pros and cons of the identified alternative rate structures.
- 3.3 Identify two preferred rate structures for development of preliminary rates.
- 3.4 Compile GIS and FEMA Map data to define high risk service areas, parcels within the high risk service areas and costs within the high risk service areas.
- 3.5 Develop preliminary rates for the two preferred rate structures identified in sub-task 3.3 and prepare a property impact analysis for each.
- 3.6 Conduct and compile a comparative rate survey for neighboring/comparable stormwater fee/assessment systems.
- 3.7 Conduct an interactive work session to review the preliminary results with City staff.
- 3.8 Adjust the rate models based upon input in the prior sub-task.
- 3.9 Conduct an interactive work session to review the preliminary results with City staff.
- 3.10 Adjust the rate models based upon input in the prior sub-task.

**Task 4: Present the Results to City Management and the City Commission.**

- 4.1 Prepare a presentation of the results of the rate structure analysis.
- 4.2 Review the presentation with City staff and finalize.
- 4.3 Meet with City Management to present the results of the rate structure analysis.
- 4.4 Make adjustments based upon input in the prior sub-task.
- 4.5 Present the results of the analysis to the City Commission in a work shop.
- 4.6 Make adjustments based upon input in the prior sub-task.

**Task 5: Prepare a Report of the Results of the Study**

- 5.1 Prepare a Draft Report
- 5.2 Review the Draft Report with City staff.
- 5.3 Make adjustments and prepare the Final Report.
- 5.4 Present the Final Report to the City Commission.
- 5.5 Attend a public hearing for adoption

## 9. AVAILABILITY OF RESOURCES

While Burton & Associates is currently under contract with other clients, we will devote the necessary resources to complete this study for the City within budget and in the desired timeframe. We have recently completed numerous studies to support adoption of budgets starting on October 1. As such, the timing of the City’s study is advantageous and will allow us to devote significant attention to the requested stormwater rate study.

Our experienced and cross-trained team will ensure that the City will receive an unparalleled quality of service throughout the conduct of the study. For studies such as the requested rate study, we will typically structure a project team with a Project Principal to ensure that all aspects of the project are properly addressed and that all of our client’s needs are met throughout the project, a Project Manager to lead overall completion of the study, a Quality Control Specialist to ensure the accuracy of all components of the analysis, and Project Consultants to provide model population, customization and analysis activities.

For the City, we have structured our project team to specifically address the City’s scope of services, but in the unlikely event there is a loss of key personnel, we have additional highly qualified resources available to fill in at each level of our project team. The table below identifies the proposed primary team member that will be assigned to the project, along with a secondary team member available to fill in if there is a loss in personnel. It is important to note that all members of our primary project team have over 10 years of industry experience. It is also important to note that four of our proposed team members, Michael Burton, Andy Burnham, Erick van Malssen and Kyle Stevens, have recent and extensive experience working with Fort Lauderdale staff and your Commission on previous financial analyses related to your stormwater fund, your other utility enterprise and special revenue funds and your General Fund.

<b>Role in Project</b>	<b>Primary</b>	<b>Secondary</b>
Project Principal	Michael Burton	William Zieburz
Project Manager	Andrew Burnham	James Bearman
QA/QC Reviewer	Eric Grau	Leticia Gaglianone
Project Consultant (Revenue Requirements)	Erick van Malssen	Vita Paltridge
Project Consultant (Cost Allocation & Rates/Fees)	Kyle Stevens	Ashley Venturoni

## 10. ADDITIONAL SERVICES AVAILABLE

Burton & Associates has been providing the following services for over 26 years:

- **REVENUE SUFFICIENCY ANALYSIS AND COST OF SERVICE ALLOCATIONS FOR:**
  - *Stormwater*
  - *Reclaimed water*
  - *Electricity*
  - *Water*
  - *Natural Gas*
  - *Solid waste*
  - *Wastewater*
  - *Recycling*
  - *General Government Funds*
- **LONG-TERM FINANCIAL PLAN DEVELOPMENT**
  - *5 and 10-year financial management plans containing annual projections of revenue, expenses, fund balances, capital funding, customers, usage, borrowing, etc.*
- **DEVELOPMENT OF CAPITAL FINANCE/FUNDING PLANS**
  - *Integration of multi-year capital programs within a multi-year financial management program*
  - *Our unique “live interactive process” and models allows us to quickly evaluate alternative capital plans and alternative funding scenarios in order to assess the implications to all aspects of the utility’s financial management program*
  - *Determination of the size and timing of borrowing to fund capital projects*
  - *Refinancing/restructuring of existing debt*
- **REVIEW AND ASSISTANCE IN DEVELOPMENT OF POLICIES INCLUDING DEBT, RESERVES, ETC.**
- **RATE STRUCTURE ANALYSIS**
  - *Development/evaluation of various rate structure components by class of customer, including (but not limited to) conservation (tiered) rates, emergency/drought surcharges, and fixed and variable cost recovery mechanisms.*
  - *All rate structures are developed to provide a fair and equitable distribution of costs while achieving desired economic, social, and environmental sustainability objectives.*
- **DEVELOPMENT OF CAPITAL COST RECOVERY CHARGES**
- **REVIEW AND DEVELOPMENT OF MISCELLANEOUS FEES & CHARGES**
  - *Including account activation fees, reconnection fees, etc.*
- **BOND FEASIBILITY REPORTS**
  - *For inclusion in the official statements of revenue bonds*
- **ASSISTANCE WITH LOCAL GRANT AND LOAN FUNDING APPLICATIONS**
- **SYSTEM & PROPERTY VALUATION AND ANALYSIS**
- **OPERATIONS PERFORMANCE REVIEWS, STRATEGIC PLANNING, FEASIBILITY ANALYSES, AND ANNEXATION ANALYSES**
- **ADMINISTRATIVE AND NEGOTIATIONS ASSISTANCE WITH ORDINANCES, INTER-LOCAL AGREEMENTS, REGULATORY MANDATES AND FISCAL IMPACT ANALYSES**
- **ANALYSIS OF THE ACQUISITION & SALE OF UTILITY SYSTEMS**
  - *Including valuation analyses, negotiation support and the development of financial management plans for the integration of acquired utilities*
- **EXPERT WITNESS TESTIMONY SERVICES**

## 11. REFERENCES

This section presents three client references for which Burton & Associates has provided similar services in the past three years. We encourage you to contact each of these references as they can attest to our experience, expertise and ability to meet schedules. If requested, we will provide sample reports and work products.



### CITY OF NORTH PORT, FLORIDA (2009-PRESENT)

We developed an alternative cost apportionment methodology and resultant alternative road and drainage assessments for the City. **The alternative cost apportionment methodology focused on the drainage portion of the assessment, but also included a detailed apportionment of costs to the road, mowing, and drainage functions.** In order to complete the study, we obtained relevant parcel data and developed compilation programs to facilitate calculation of assessments using the alternative cost apportionment methods evaluated. **This study was commissioned by the City after two prior studies by other consultants were not successful in producing road and drainage assessments that were deemed to be fair to all property classes.** The results of the study were well received by City staff, management, elected officials, and citizens and were implemented by the City. Subsequent to the initial study, we have prepared periodic updates to the road and drainage assessments as requested by the City.

**B&A Team:** Michael Burton, Andrew Burnham, Erick van Malssen

**Client Contact:** Ms. Lynn Banish, Business Manager, 1930 West Price Blvd, North Port, FL 34286, (941) 240-8050, [lbanship@cityofnorthport.com](mailto:lbanship@cityofnorthport.com)



### CITY OF FORT MYERS, FLORIDA (1998 – PRESENT)

In FY 2014, we assisted the City in adjusting the City's Stormwater Assessment roll, to exclude common properties associated with condominiums and we developed an algorithm to spread the costs that would otherwise be apportioned to those common properties to the associated condominium parcels. In 2009, we developed a new Stormwater Utility Assessment/Fee Program for the City. The fee was based upon impervious area and was collected initially on the monthly utility bill, with a plan to convert to using the uniform method of collection via annual property tax bills in the second year of the program. Our services included the development of alternative fee structures, required ordinances, and matching parcel data with utility billing data for the conversion from monthly billing to the uniform method of collection via the tax bill (that assessment roll was adjusted based upon the above referenced project that we conducted in FY 2014). **In order to complete the study, we obtained relevant parcel data from the Lee County Property Appraiser, performed extensive GIS-based property sampling to validate impervious area calculations for various property classes, and developed compilation programs to facilitate the alternative cost apportionment methods evaluated.** We also developed a ten-year financial plan for the newly created stormwater utility, inclusive of annual rate adjustments required to fund the utility's future cost requirements.

**B&A Team:** Michael Burton, Andrew Burnham

**Client Contact:** Ms. Donna Lovejoy, Administrative Services Manager, Public Works, 2200 2nd St., Fort Myers, Florida 33902, (239) 461-3757, [dlovejoy@cityftmyers.com](mailto:dlovejoy@cityftmyers.com)



**CITY OF COLUMBIA, MISSOURI (2014 – PRESENT)**

We recently completed comprehensive **sewer and stormwater cost of service rate studies** for the City. During both studies, we performed a revenue sufficiency analysis in order to **develop a multi-year plan of rate revenue increases to satisfy the annual operating, debt service, and capital requirements of the Utility as well as maintain adequate operating reserves**. We provided the City with separate 10-year forecasts of the revenue requirements of each utility. We then performed a rate structure review (including evaluation of rates for wholesale users, such as the University of Missouri), and developed recommended modifications in order to ensure that the City's rates conformed to accepted industry practice and reflect a fair and equitable distribution of system costs. **In addition, we performed a connection fee (impact fee) analysis for the sewer system to calculate updated fees based upon the cost of existing infrastructure and the five-year capital improvement program, and recommended a multi-year plan to achieve full cost recovery connection fees.** Finally, we reviewed and developed modifications to the City's **residential and commercial sewer security deposits** to appropriately reflect the actual potential lost revenue due to non-payment.

**B&A Team:** Michael Burton, Andrew Burnham, Kayle Moore, Ashley Venturoni

**Client Contact:** Ms. Heather Guess, Senior Financial Analyst, 701 E. Broadway, Columbia, MO 65201, (573) 874-6342, [hmguess@gocolumbiamo.com](mailto:hmguess@gocolumbiamo.com)



## 12. LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

### LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the local BUSINESS preference classification as indicated herein, and further certifies and agrees that it will re-affirm its local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this ITB. Violation of the foregoing provision may result in contract termination.

- (1) \_\_\_\_\_  
Business Name is a **Class A** Business as defined in City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the City of Fort Lauderdale current year Business Tax Receipt **and** a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
- (2) \_\_\_\_\_  
Business Name is a **Class B** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the Business Tax Receipt **or** a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
- (3) \_\_\_\_\_  
Business Name is a **Class C** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the Broward County Business Tax Receipt shall be provided within 10 calendar days of a formal request by the City.
- (4) \_\_\_\_\_  
Business Name requests a **Conditional Class A** classification as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- (5) \_\_\_\_\_  
Business Name requests a **Conditional Class B** classification as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- (6) Burton & Associates, Inc.  
Business Name is considered a **Class D** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. and does not qualify for Local Preference consideration.

BIDDER'S COMPANY: Burton & Associates, Inc.

AUTHORIZED COMPANY PERSON: Michael Burton  December 16, 2014  
NAME SIGNATURE DATE

October 25, 2013

## 13. ADDITIONAL INFORMATION

**Project Involving Bi-furcation of the Stormwater Service Area** - Another interesting stormwater study that included bi-furcation of the service area based upon benefit and cost, was a study that we conducted for the Ranger Drainage District (District), in Orange County, Florida from 2007 through 2009. During that time, **we developed non-ad valorem capital assessments and non-ad valorem maintenance assessments for the District (established under FS 298)**. We worked closely with the District's engineers to apportion the cost of the capital improvement program and maintenance activities to property classes. Of significant importance was the distinction between "estate parcels" (larger 2 to 4 acres parcels in the southern portion of the District), and "city" parcels (smaller ¼ acre parcels in the more densely developed northern portion of the District). **We divided the District into sub-basins based upon our evaluation of the parcel classes receiving benefit from specific capital projects and maintenance activities.**

**Some projects and maintenance activities were allocated into a District-wide benefit cost pool and spread equally among all parcels and others were allocated into specific sub-basins and allocated to those parcels in each sub-basin which received specific benefit from the project(s) and/or maintenance activities.** Subsequent to the initial analysis, we prepared a limited update and also provided assistance in the update/maintenance of the assessment.

**GIS Experience with Stormwater Systems** - Also important to note is the experience of our GIS sub-consultant, McKim & Creed. While the primary use of McKim & Creed on our project team will be to provide GIS assistance, they will also be available to coordinate assimilation of cost data from the City's Master Plan consultant into our analysis and to provide any additional engineering related analysis that may be required during the conduct of the rate study. McKim & Creed offers a full range of engineering, surveying, and planning services. Core competencies of the firm include water resources planning and design, site / civil engineering, hydraulic design, landscape architecture, structural engineering, GIS, and surveying specialties ranging from electronic data collection to hydrographic surveying, aerial photogrammetry, laser scanning and subsurface utility engineering. Engineering News-Record has named McKim & Creed one of the top 500 design firms and top 200 environmental firms in the U.S. Public Works magazine ranked McKim & Creed as one of the top AEC firms in the U.S., and Southeast Construction names the firm as one of the top firms in the region. McKim & Creed has valuable GIS and stormwater experience in Florida and throughout the country, and we have provided examples of such experience below.

### ***GIS/GPS Mapping of Stormwater Infrastructure Work Area 1, City of Wilmington, NC***

McKim & Creed worked with the City of Wilmington to GPS map all existing stormwater features with the final goal of a complete GIS stormwater database. The project was divided into work areas ranging from two to three square miles. Prior to mapping a work area, a pre-meeting was held with the City of Wilmington's stormwater group and McKim & Creed project managers to define the work area and the

scope of services to be performed. Each work area was unique in that features may have been previously mapped or impending capital projects dictate changes in the features; additionally, public/private issues must be considered for each work area. The scope of work performed by McKim & Creed primarily involved using mapping grade GPS to locate the stormwater features (manholes, junction boxes, etc) in the public right-of-way in order to provide overall database connectivity for the city's stormwater system. Additionally, attributes of the various stormwater structures were included with their location. These attributes included features such as pipe size and pipe type as well as illicit discharge, if applicable. All connectivity and feature attribution was performed in the field with Arc Map and Trimble GPS Analyst Extensions. Edits and attribution was performed by the field operators using "off the shelf" software and hardware.

***GIS Water/Wastewater Utility Data Development, City of Safety Harbor, FL***

McKim & Creed's GIS Team completed a six-month collection of the City of Safety Harbor's utility network. Each water, stormwater, and wastewater aboveground feature was mapped with a GPS unit to mapping grade accuracy. A GIS data layer of each network was created from the surface point feature. Once complete, the City had an accurate inventory of their utility network in one central location, providing the ability to quickly locate those features. In addition, the system-wide GIS display and analysis capabilities enhanced daily operations, saved time by eliminating the effort to track down archived information, and simplified current maintenance procedures.

***Hillsborough County Utility Pressure System Above Ground Asset Inventory Services, Tampa, FL***

McKim & Creed provided technical services to add feature location information and asset management attributes to Hillsborough County's existing GIS database and asset management system throughout the County's entire water distribution service area. Mapping grade GPS locations were obtained on approximately 48,000 above-ground utility potable water, reclaimed water, and wastewater force main systems. Data was collected by field crews utilizing Panasonic Tablet PCs with customized mobile GIS field software. Field crews also used a Segway personal transport unit to assist in the efficiency of field data collection. Using engineering record documents as a cross check for the asset and to populate information to the attribute tables. The final deliverable was an Esri personal geodatabase file.

***GIS Implementation Coordination and Development of Address Points, City of Safety Harbor, FL***

McKim & Creed's GIS team coordinated with the City of Safety Harbor in the development and implementation of a Geographic Information System. The goals of the City's GIS Implementation were to allow users to access the City data quickly and easily with the most accurate and up-to-date data. McKim & Creed's GIS staff developed a series of tasks outlining the steps to integrate a citywide GIS system that involved the acquisition and installation of software, database development, quality assurance and quality control, and data integration. Monthly taskforce meetings were held to ensure implementation adhered to the proposed project schedule. McKim & Creed's GIS Team developed an Address Point data layer for the City of Safety Harbor's GIS implementation. For the project, point features were created for

each structure in the City using the Pinellas County Parcel Dataset as the base map source. A database schema was designed for the address feature class in an ESRI 9.1 personal geodatabase format.

***GIS Data Conversion of Utility Plan Submittal Backlog, City of Fort Myers, FL***

McKim & Creed converted CAD drawings of the City's potable water, raw water, reuse water, sanitary sewer and storm water features to GIS for incorporation in their Geodatabase Utility Model (GDB) format. The integrity and spatial accuracy of the digital as-built data was confirmed before converting the line, point, and polygonal features.

***Dominion Power On-Call SUE, GPR and GIS Services, Dominion Power, Surry, VA***

McKim & Creed provided GIS services for Surry Power Stations Utility Inventory to design their GIS geodatabase and maintain the GIS as-needed when new field data is collected on a utility. We also updated their GIS data from record drawing information. Their underground infrastructure GIS includes water, sewer, stormwater, electric, telecommunications, gas, and steam. McKim & Creed used this data to develop a 3D model of their plant with buildings and topographic ground surface to represent any utility data that was collected with a depth and ground elevation using Subsurface Utility Engineering (SUE) services.

***Greensboro Stormwater GIS Conversion, City of Greensboro, Greensboro, NC***

McKim & Creed provided professional GIS data migration services for the City of Greensboro's existing stormwater utility inventory. The project consisted of three phases. Phase I involved a complete citywide stormwater inventory review so that any challenges during the migration task would be fully understood from the project onset. Phase II was a thorough updating of the existing stormwater database design from a legacy system to the new ArcGIS suite of products. And finally, Phase III consisted of a variety of data migration tasks such as: review of Mylar black sheets for QA/QC, establishment of feature photo hotlinks, post- processing and personal geodatabase development. In addition, McKim & Creed has also served the following Florida clients:

- |                         |                        |                           |
|-------------------------|------------------------|---------------------------|
| Citrus County           | City of Ormond Beach   | Lee County, FL            |
| City of Bunnell         | City of Palm Coast     | Manatee County            |
| City of Clearwater      | City of Safety Harbor  | Palm Beach County         |
| City of Daytona Beach   | City of Sarasota       | Pinellas County           |
| City of DeLand          | City of St. Petersburg | Sarasota County           |
| City of Deltona         | City of Tampa          | Town of Belleair          |
| City of Dunedin         | City of Tarpon Springs | Utilities Commission, New |
| City of Largo           | City of Venice         | Smyrna Beach              |
| City of New Port Richey | City of Zephyrhills    | Volusia County            |
| City of North Port      | Collier County         |                           |
| City of Ocoee           | Flagler County         |                           |
| City of Oldsmar         | Hillsborough County    |                           |