



# CITY OF CRESTVIEW

## CITY COUNCIL



CITY COUNCIL AGENDA  
January 24, 2022  
6:00 PM  
Council Chambers

Amended

### REGULAR COUNCIL MEETING

The Public is invited to view our meetings on the City of Crestview Live stream a at <https://www.cityofcrestview.org> or the City of Crestview Facebook Page. You may submit questions on any agenda item in advance (by 3:00 PM the day of the meeting, please) to [cityclerk@cityofcrestview.org](mailto:cityclerk@cityofcrestview.org).

1. Call to Order
2. Invocation, Pledge of Allegiance
  - 2.1. Pastor Jeff Childers of the Shepherd Church
3. Open Policy Making and Legislative Session
4. Approve Agenda
5. Presentations and Reports
  - 5.1. Proclamation declaring February as Black History Month
  - 5.2. Florida League of Cities Priorities
6. Consent Agenda
  - 6.1. Waiver of Purchasing Policy- Firefighter medical screenings
  - 6.2. Approval of draft minutes for 10/11/21, 10/14/21, 10/18/21, 11/8/21 and 1/10/22
  - 6.3. Approval of change order #1 with Sawcross for the WWTP Solids Handling and Dewatering project

6.4. Contract Award, Street Resurfacing Bid

6.5. Asphalt Quotes for Cart Path

**7. Public Hearings / Ordinances on Second Reading**

7.1. Ordinance 1840 - Lindley Road Annexation

7.2. Ordinance 1850 - Amendment to LDC Section 8.04.00 - Street Access and Driveway Design Requirements

7.3. Ordinance 1851 - Amendment to LDC Section 6.01.02 – Residential Design Standards

**8. Ordinances on First Reading**

**9. Resolutions**

**10. Action Items**

Task Order 2022-02 for Professional Engineering and Consulting Services for the SR 85 Bypass  
10.1. East-West Connector Utility Design and Permitting

10.2. Approval of Auditing Services Firm

**11. City Clerk Report**

11.1. Update on City Clerk Process

**12. City Manager Report**

12.1. City Manager Updates

12.2. Memorandum of Understanding to Develop City Property

**13. Comments from the Mayor and Council**

**14. Comments from the Audience**

**15. Adjournment**

The Presentations section is for items that were submitted by a citizen or group of Citizens no later than the Wednesday 2 weeks prior to the meeting to the Clerk's office for approval. These items will be scheduled under the section titles Presentations and Reports. Supporting documents must be submitted at this time to be on the regular agenda. All Action Items are for staff and elected officials only and must be submitted for approval no later than the Wednesday 10 days prior to the meeting. Those not listed on the regular agenda who wish to address the council should fill out a yellow card. The card must be submitted to the City Clerk. Speaking time should be three minutes or less, large groups may designate a spokesperson. All remarks should be addressed to the Council as a whole and not to individual members. All meeting procedures are outlined in the Meeting Rules and Procedures brochure available outside the Chambers. Florida Statute 286.0105. Notices of meetings and hearings must advise that a record is required to appeal. Each board, commission, or agency of this state or of any political subdivision thereof shall include in the notice of any meeting or hearing, if notice of the meeting or hearing is required, of such board, commission, or agency, conspicuously on such notice, the advice that, if a person decides to appeal any decision made by the board, agency, or commission with respect to any matter considered at such meeting or hearing, he or she will need a record of the proceedings, and that, for such purpose, he or she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. The requirements of this section do not apply to the notice provided in s. 200.065(3). In accordance with Section 286.26, F.S., persons with disabilities needing special accommodations, please contact Maryanne Schrader, City Clerk at [cityclerk@cityofcrestview.org](mailto:cityclerk@cityofcrestview.org) or 850-628-1560 option2 within 48 hours of the scheduled meeting. Any invocation that is offered before the official start of the City Council meeting shall be the voluntary



offering of a private person, to and for the benefit of the City Council. The views or beliefs expressed by the invocation speaker have not been previously reviewed or approved by the City Council or the city staff, and the City is not allowed by law to endorse the religious beliefs or views of this, or any other speaker. Persons in attendance at the City Council meeting are invited to stand during the opening invocation and Pledge of Allegiance. However, such invitation shall not be construed as a demand, order, or any other type of command. No person in attendance at the meeting shall be required to participate in any opening invocation that is offered. A person may exit the City Council Chambers and return upon completion of the opening invocation if a person does not wish to participate in or witness the opening invocation.



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Presentation

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM:  
DATE:  
SUBJECT: Proclamation declaring February as Black History Month

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## **BACKGROUND:**

## **DISCUSSION:**

## **GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Infrastructure-* Satisfy current and future infrastructure needs

*Communication-* To engage, inform and educate public and staff

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Community Character-* Promote desirable growth with a hometown atmosphere

*Safety-* Ensure the continuous safety of citizens and visitors

*Mobility-* Provide safe, efficient and accessible means for mobility

*Opportunity-* Promote an environment that encourages economic and educational opportunity

*Play-* Expand recreational and entertainment activities within the City

*Community Culture-* Develop a specific identity for Crestview

## **FINANCIAL IMPACT**

## **RECOMMENDED ACTION**

Staff respectfully requests

## **Attachments**

1. Black History Month Proclamation





# Proclamation

**WHEREAS**, during National Black History Month, we celebrate the vast contributions of Black Americans to our Nation's history and identity; and

**WHEREAS**, Black History Month grew out of the establishment, in 1926, of Negro History Week by Dr. Carter G. Woodson and the Association for the Study of African American Life and History; and

**WHEREAS**, the 2022 national theme for the observance is "Black Health and Wellness;" and

**WHEREAS**, the City of Crestview is deeply committed to equity and inclusion. This stance includes the cultural and racial affirmation of our students, staff, parents, and community members who identify as Black Americans; and

**WHEREAS**, the City of Crestview strives to close the equity and outcome gaps for Blacks through policies and practices that reflect the experiences of Blacks, ensure greater access and opportunity to healthcare and honor history, heritage, and contributions; and

**WHEREAS**, our community is better because of the diversity of our population; and

**NOW, THEREFORE, BE IT RESOLVED** that the City of Crestview, the Mayor and City Council hereby proclaim and recognize the Month of February 2022 as

## **Black History Month**

and encourage all residents to honor Black American History and Culture.

***DULY PASSED AND ADOPTED ON THIS 24TH DAY OF JANUARY 2022***

  
Mayor JB Whitten  
City of Crestview, Florida



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Presentation

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: J.B. Whitten, Mayor  
DATE:  
SUBJECT: Florida League of Cities Priorities

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## **BACKGROUND:**

## **DISCUSSION:**

## **GOALS & OBJECTIVES**

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## **FINANCIAL IMPACT**

## **RECOMMENDED ACTION**

Staff respectfully requests

## **Attachments**

1. project summary for state

## 2. The Advo-Kit



## City of Crestview Appropriation Project Requests

### 1. Redstone Avenue and Brookmeade Drive Intersection Improvement

Amount Requested from the State in this Appropriations Project Request: 2,000,000  
Local 50% Total 4,000,000.

Redstone Ave. is a major east-west connector road and has a hospital, two schools, several businesses and over 1000 homes located on it. Brookmeade Dr. is a major north-south connector road and serves a fire station, several business areas including a Walmart, two parks, and over 100 homes. The intersection of these two roads is undersized and misaligned. This project would correct the alignment, add turn lanes, and change the 4-way stop to a signalized intersection. In addition, there is a 1500-foot section of Redstone Ave. that needs to be outfitted with an improved stormwater conveyance system. This section will have curb and gutter installed, will be repaved, and will have the existing driveways reshaped.

### 2. Mirage Avenue and Crosson Street Traffic Safety Improvements

Amount Requested from the State in this Appropriations Project Request: 500,000 Local  
50% Total 1,000,000.

Mirage Ave. intersects Hwy 85 less than one quarter mile north of Interstate 10. This intersection has several commercial businesses that serve travelers headed east and west on Interstate 10 and North and South on Hwy 85. The current configuration of Mirage Ave. from Hwy 85 to the first crossroads is unsafe and causes backups onto the highway resulting in traffic crashes on a regular basis. The funds requested here will assist in limiting left hand turns out of businesses near the intersection by routing travelers through a round-a-bout. This will reduce accidents and improve the safe flow of traffic.

### 3. Highway 85 Southbound Turn Lane

Amount Requested from the State in this Appropriations Project Request: 250,000 Local  
50% Total 500,000.

A new east-west connector roadway will be built along with a new signalized intersection. This will require a new southbound turn lane. The new turn lane will make the new intersection safer for the southbound right turn movement and make the intersection as a whole function in a more cohesive, safer way.



City Hall  
198 Wilson St N. Crestview, FL 32536  
Tim Bolduc, City Manager 850.682.1560, ext. 252



#### 4. Septic to Sewer Conversion of Foxwood Estates and Country Club Estates

Amount Requested from the State in this Appropriations Project Request: 891,500 Local 50% Total 1,783,000.

Foxwood Estates and Country Club Estates are subdivisions in Crestview, Florida where the majority of the home's septic tanks are failing or have failed. The city has taken water samples of the water on the road, and they came back with extremely high fecal coliform counts. The city is proposing installation of 105 grinder pumps, 29,900' of low-pressure force main along the roads, and a lift station to connect the subdivisions to the City's sewer system. The lift station will not be included in the requested funds.



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# THE **ADVO-KIT**

**An advocacy toolkit for municipal officials**



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# INTRODUCTION

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Whether you're a newly elected official or you've been in office for a number of years, The Advo-Kit advocacy toolkit from the Florida League of Cities has something for every local leader to help make your advocacy even more successful. New to office? The Advo-Kit has sections explaining the importance of Home Rule and examples of legislation that impact your community, as well as information on contacting your legislators, crafting your message and building relationships with legislators. For those officials already experienced in advocating, The Advo-Kit has resources for you too, such as working with the media to spread your message and suggestions on media outlets to follow, as well as reminders on how to properly testify in front of legislative committees and keys to lobbying in person, virtually or via email. Let The Advo-Kit help to ensure your advocacy is as successful and impactful as possible.

# WHAT IS HOME RULE, AND WHY SHOULD I CARE?

## WHAT IS HOME RULE?

It gives each city the flexibility to craft its laws specifically to its unique needs. It's the idea that our communities should be governed by the people who live in them. Voters put Home Rule powers in the Florida Constitution more than 50 years ago. These powers state that any city can adopt laws as long as the law doesn't conflict with state or federal law. An easy way to understand it is: ***Local Voices Making Local Choices.***

## WHY SHOULD I CARE ABOUT HOME RULE?

Home Rule means local decision-making. If a city wants to install a stoplight, add a traffic sign, build a holding pond to prevent flooding or hold a parade, it doesn't need to ask the Legislature for permission. As long as it doesn't violate state law, cities have the flexibility and independence to serve their citizens' needs and preferences. Citizens trust local leaders like you to enforce laws "at home" and make necessary changes as a city grows.



**Home Rule is important because it means that decisions for your city are made by the people who love it enough to call it home. They are committed to its success.**



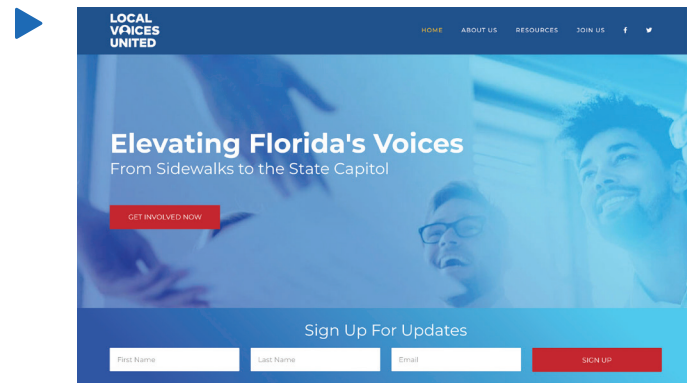
## How can I get involved in the mission to protect and promote Home Rule?

Make your voice heard! Pledge your support to protect local self-government. Tell your legislators to focus on statewide issues and leave the local ones to the officials you elected. Get in touch with your state legislators and tell them, "We need local voices making local choices!" Share this message on social media. The Florida League of Cities has resources available for you to use to learn more and get engaged; just visit [localvoicesunited.com](http://localvoicesunited.com).



## Home Rule makes a lot of sense, so why are there constant attempts to get rid of it?

The answer: Government closest to the people is generally more responsive, accountable and effective; however, powerful special interests are trying to centralize control and override the decisions of local voters. These attempts seek to circumvent local decision-making and trample on the individuality of each city, town and village. In the past four legislative sessions alone, more than 100 preemption bills were filed. "One-size-fits-all" doesn't work in Florida. Each community is unique, and local government should reflect the needs of its residents.



## Half of Florida residents live in cities.

In the State of Florida, no matter where you reside, you live in a county and a school district. That is not the case with city government. More than half of Florida residents choose to live in a city. That's because cities are a great place to live, work and play.

Cities are created and designed by their residents, for their residents. They are the only voluntary level of local government in the Sunshine State. Cities require choice on the part of their residents, and with that choice comes the benefit of grassroots democracy, true self-governance and Home Rule powers.

# EXAMPLES OF LEGISLATION THAT HURT YOUR HOMETOWN

There are two major threats to cities and taxpayers.

- 1** One is special interests dictating who should be in charge of what happens locally. (This situation is called a preemption.)
- 2** Another is those same special interests requiring cities to do something that's going to cost money, but they don't provide any money to pay for it. (This situation is called an unfunded mandate.) In this case, the city must raise taxes or cut services to pay for it.



## **100+ Preemption Bills**

In the last four years alone, more than 100 bills were filed that would have preempted local control over local decisions. Our residents have helped stop many preemption bills from passing by contacting their state legislators and sharing how the bills would impact them.



ADVOCACY –  
EDUCATING, ENGAGING  
& ENERGIZING CITIZENS  
ON HOME RULE

◀ *Watch the 2021 Annual Conference Session: Advocacy – Educating, Engaging & Energizing Citizens on Home Rule*



# Here are some real examples of what happens in the state Capitol in Tallahassee:

- ▶ A bill would stop cities from determining the appropriate location of short-term rentals. You could have a party house next door, and your city would not be able to stop it. Unruly behavior and issues with parking and public safety destroy the look and feel of our neighborhoods. Many of these rental homes are owned by out-of-state corporations. While residents suffer and property values plummet, these corporations profit. And you don't know who's staying in those "mini-hotels."
- ▶ A bill was passed that allows big telecommunications companies to profit from taxpayer-owned land. It gives big telecom the green light to stick their equipment, some as large as a kitchen refrigerator, along your street and in front of your house whether you want it or not. Cities have minimal authority to control where the equipment is placed. Do these companies care about the quality of life or the aesthetics of your neighborhoods? Plus, they pay next to nothing for using city sidewalks and street corners.
- ▶ Another bill put the state in charge of regulating home-based businesses. Now, a neighbor can set up a commercial auto repair shop in their garage. Or one of your residents' backyards can overlook a home-based junkyard business.
- ▶ And finally, a bill was proposed prohibiting city design standards. The bill would have significantly affected the ability of a city to preserve the character of its traditional neighborhoods. City design standards ensure that new homes being built in these neighborhoods fit with the character of the neighborhood. Shouldn't that be something local city officials do with the input of the residents who live in your city?

## 1992

Back in 1992, the **Sadowski Affordable Housing Act** was created to be used only for funding affordable housing in the state. The act is funded from doc stamps when property in Florida is bought and sold. It is not funded by the Legislature. A great law with great promise for our residents most in need. Unfortunately, it was not long before those affordable housing funds were used for other purposes.



**Legislative Bill Summaries** – Use this tool to stay up to date on important issues impacting municipalities. Each week during session, the League's lobbying team will provide updates on each issue, where the bill stands in the process and what help is needed to support or defeat each bill.



# BECOME A HOME RULE HERO

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## Successful advocacy starts at home, not in Tallahassee.

No one – not even a professional lobbyist – can tell your community's story better than you. Your involvement helps the League's legislative team turn the abstract into the concrete. It is essential for helping legislators understand how their decisions may impact their communities back home.

The Florida League of Cities (FLC) appreciates the individual advocacy efforts undertaken by municipal officials throughout the state. Each year, there are some League members who make an extraordinary effort, people who stand out for their high level of participation and effectiveness.

The Home Rule Hero Award was created to acknowledge and thank them for their efforts. Hundreds of municipal officials have been recognized as "Home Rule Heroes" since the award's inception in 2009, and we thank you!

Home Rule Hero Award recipients are selected by the League's legislative team following each legislative session.





## ◀ Interested in becoming a Home Rule Hero?

For the award, the most important criteria are timely response and action to FLC's Legislative Alerts and notifying FLC staff of communication with your legislators.

### THERE ARE OTHER WAYS TO GET INVOLVED, INCLUDING:

- ▶ Attending the FLC's Legislative Action Days in Tallahassee and Legislative Conference.
- ▶ Testifying before a House or Senate committee on an FLC issue.
- ▶ Participating in FLC's Monday Morning "Call-ins" during session and in FLC's pre- and post-legislative session webinars.
- ▶ Participating in FLC's Legislator "Key Contact" program.
- ▶ Meeting legislators in their districts or Tallahassee.
- ▶ Providing information and data about how proposed legislation will specifically impact your city (telling your city's "story").
- ▶ Communicating frequently and effectively with legislators and their staff and publicly recognizing them for their assistance.
- ▶ Attending local legislative delegation meetings to discuss municipal issues.



▶ Another way to get involved instantly is by signing up for the League's text messaging service.

Just text **"local voices"** to **50457**.



For more information on these activities and ways to step up your advocacy game, please contact **Allison Payne** at [apayne@flcities.com](mailto:apayne@flcities.com).



# HOW TO PREPARE FOR UPCOMING LEGISLATIVE SESSION

In an even-numbered year, such as 2022, session begins on the second Tuesday after the first Monday in January (**January 11 in 2022**). In an odd-numbered year, such as 2023, session begins on the first Tuesday after the first Monday in March (March 7 in 2023). Now is the time for city officials to meet with legislators, build and strengthen relationships and educate legislators on what is going on in their cities.

## Below is a list of 10 things city officials can do before session begins:

- 1 **Share your proposed budget with your legislators.** Provide them with your city's budget summary, and then schedule a meeting to discuss your city's priorities for the next year.
- 2 **Offer assistance to your legislators.** Be sure to ask, "What can I do for you?" Don't wait until you need their assistance on an issue. It will go a long way and strengthen these relationships.
- 3 **Prepare a brief summary of important legislative issues that are important to your city.** If your city has a particular issue (or issues) that you wish to discuss, prepare a one-page summary of the issue that you can leave with the legislator. Don't forget to also provide information to his or her legislative assistant.
- 4 **Invite legislators to attend local/regional league meetings and city commission meetings.** These meetings will give your legislators an opportunity to discuss their priorities for the upcoming session.
- 5 **Become personally acquainted with the legislative staff.** Always be courteous. They are your link to getting an appointment and can help with your legislative issues.
- 6 **Brief legislators on what is going on in your city.** Add legislators to your city mailing list for important issues.
- 7 **Invite legislators/staff to visit project facilities,** such as water treatment plants, community redevelopment agencies and transportation projects.
- 8 **Meet with your legislative delegation** to discuss municipal issues at least 10-12 weeks prior to session.
- 9 **Publicly recognize legislators for good deeds.**
- 10 **Attend the *Florida League of Cities Legislative Action Days* in Tallahassee.**



**Curious how legislators voted on certain bills and issues? Check out the League's *Key Votes Summary* document and *Legislative Session Final Report* to find out, and hold lawmakers accountable.**





# ADVOCACY TIPS FOR BEGINNERS

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## Below are some advocacy tips to help ensure your meetings with legislators are successful and productive:

- ▶ Tell you city's story as it relates to the issue.
- ▶ If you are meeting to ask for their vote, then ask for it. Don't assume they are going to support you because they were nice and you had a pleasant conversation.
- ▶ Don't mistake brevity for rudeness. Their schedules are very busy, and they just don't have the luxury of spending the same amount of time with you as they do back in the district.
- ▶ Be polite to their staff when you arrive and when you leave. Legislators rely heavily on their staff and, more importantly, their staff's opinions.
- ▶ Don't act disappointed if the legislator is not available when you arrive and you have to meet with a staff member instead. Continue with the meeting as planned.
- ▶ If your legislator does not support your position, ask them to reconsider (if appropriate) and offer to provide them with additional information that might change their mind.
- ▶ If they are firm in their opposition, thank them for their time and their honesty and leave the meeting on a positive note. The fact that they disagree with you on some issues doesn't mean they will disagree on all issues. A memorable way to conclude your meeting is with a "How can I help you?" question. They may respond with, "There's nothing right now." But they won't forget that you asked.
- ▶ Send a follow-up thank you letter or email reiterating what you talked about and heard and/or agreed to during the conversation.



Another Florida League of Cities tool you can use is our **Guide To Presenting FLC Legislative Issues**. This document provides tips on how you can ensure your discussion or presentation to legislators is a success.



Keep the FLC staff apprised of your conversations/communications by copying them on emails or sending a follow-up meeting summary. Please provide feedback on your meetings to **Allison Payne** at [apayne@flcities.com](mailto:apayne@flcities.com).



# BUILDING RELATIONSHIPS WITH LEGISLATORS

As a city official, you are well aware that the effectiveness of your work often depends on the quality of your relationships. This statement is also true of relationships with lawmakers. You must develop relationships with legislators and their staff members long before you turn to them for an understanding of your point of view on an issue. Strong personal relationships are the best means of influencing legislative decision-making. Personal visits, letters, phone calls and emails also are important.

Building relationships takes time and careful effort, but it is the most effective way to shape the thinking of those who decide public policy.

How do you go about building such relationships? In much the same way that you cultivate friendships:

by being friendly and personally helpful. "Personally helpful" cannot be emphasized enough. Become a useful and trustworthy source of sound information and insight. Contribute your personal time to professional and political needs and interests. Your own party affiliation should not restrict you. Every elected officeholder represents an entire state, legislative district, or local government, Republicans, Democrats and independents alike. You do not have to be a member of the legislator's political party to work together and even become friends. You will, however, need to do some homework about the key issues – for example, economic facts, employment statistics, etc. – that are important to the interests and viewpoint you represent. In the same way, familiarize yourself about the legislators with whom you want to build relationships.



## Become a fountain of facts. Be aware and be prepared with examples relevant to your municipality or congressional district.

### Some relationship-building phases in a legislative advocacy program are:

- ▶ Write and/or call legislators on current issues.
- ▶ Make personal visits in Washington, D.C., your state capitol or in the home district offices on current issues or broad problems.
- ▶ Organize group visits with officials from other neighboring cities on issues of mutual importance.
- ▶ Gather affected business leaders and interested stakeholders for a group visit to share the impact of proposed legislation with your legislators.
- ▶ Invite legislators to tour your municipality and meet with your administration for a discussion of problems and issues. Also consider inviting legislators to attend special events where they might get some publicity.

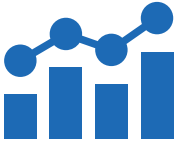
### Here are some ways you can work with the Florida League of Cities (FLC) Federal Affairs staff to build relationships at the federal level:

- ▶ Develop resource relationships that officeholders can call on at will for reliable and authoritative technical or economic information.
- ▶ Leverage legislative influence through effective coalition activities.

- ▶ Become a member of the League's Federal Action Strike Team (FAST). The FAST Committee leads our comprehensive federal lobbying efforts.
- ▶ Join us for our annual FAST Fly-In trip to Washington, D.C. During this trip, members meet with Florida's congressional delegation as well as other federal partners and stakeholders.
- ▶ Get to know your congressional members. Reach out to your U.S. Senators and Representatives and share with them the issues impacting your communities.
- ▶ Give a tour of your city, as there's no better way to explain how federal legislation may impact your municipality better than an in-person, hands-on visit by your delegation.
- ▶ Get involved with the National League of Cities (NLC) by **becoming a member**. The NLC is a tremendous resource and partner.

These steps will progressively build your credibility with the officeholder. Establishing a reputation as an objective data source, for example, builds credibility for subsequent communications expressing opinions on issues. Ongoing political activity establishes you as a friend whose views are likely to receive more weight than those of someone who writes from time to time.

# BUILDING RELATIONSHIPS WITH LEGISLATORS



## USING DATA TO TELL YOUR STORY

Workforce and economic data are often essential to support your case regarding key issues. The data can be presented as a sentence or two in a letter to a legislator, as a brief paragraph in position papers and press releases, during personal visits or in a brochure for the public or government audiences.

If technical data are necessary to address specific issues, they must be used with sophistication. Technical experts on policymakers' staffs may comprehend and delight in complex tables and charts, but the decision-makers themselves have very low tolerance for such detail. When using charts to convey information, avoid using technical jargon. If such terms are required, you should explain them so that a non-technical audience can understand.

### Here are some handy guidelines for using local and economic data:

- ▶ **Be concise.** Use exactly the information you need to build credibility and make the case, and then stop. Stretching data to fit the need will strain your credibility.
- ▶ **Be accurate.** Test your presentation by delivering it to a few friends or colleagues first. If they find it tiresome or confusing, a good chance exists that your target audience would too.
- ▶ **Be current.** Make sure you have your references for your data handy, or be prepared to make references available if necessary.





## PERSONAL VISITS

Personal meetings with legislators and their key staff members are the most effective way to make your case on an issue. A personal meeting can be difficult to accomplish with a policymaker's busy schedule, but remember that you are offering an important contact. You can arrange the meeting with the policymaker directly or through staff aides.

### **The following suggestions will help make the best use of your time and the legislator's:**

- ▶ Always make an appointment. Arranging the first meeting may require patience on your part, but be persistent. Later, as you become known as a resource, gaining appointments will be less difficult.
- ▶ Be prepared to meet with key legislative personnel or committee staff members if the legislator is unavailable at the last moment. Briefing these people before your visit also may be useful so that they can prepare the legislator. Staff aides are often more knowledgeable about details of a specific issue than lawmakers themselves.
- ▶ If several individuals join you in the visit, decide in advance who will be the principal spokesperson. That individual, of course, should encourage others to participate in the discussion to share particular expertise or experiences.
- ▶ If you want to discuss a specific issue, make sure you are thoroughly familiar with all aspects of it before going into the meeting.
- ▶ When talking to legislators, try to be concise, well-organized and mindful of the other person's time. State your view firmly, but be attentive to the policymaker's position also.
- ▶ Open the discussion by reminding the legislator who you are, whom you represent and why you are there. Know the issue and the bill number. Clearly state your concern about the issue, how it will affect you, your municipality and the surrounding community.



# BUILDING RELATIONSHIPS WITH LEGISLATORS

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- ▶ Avoid harsh accusations. Be polite and respectful. Often, we forget how we sound when we are particularly passionate about an issue.
- ▶ Always be truthful, and never mislead. Your personal credibility and that of your municipality is at stake. If you do not have the answer to a question, do not improvise. Promise to get back to the questioner with the necessary information, and be sure to do so promptly.
- ▶ Come prepared with a brief (one-page) position paper that summarizes your points with facts, and leave it with the legislator or staff aide. If a lengthier document or answers to questions are relevant, send them later with a thank-you note.
- ▶ To gain a favorable vote, follow up with a letter(s) and calls to your legislators and their key staff advisors at appropriate points as the issue progresses.
- ▶ Maintain the relationship. Get your name on legislative mailing lists. Find occasions to see your legislators again in appropriate circumstances, and write to them on the issues from time to time. If you obtain reports or data that will be useful to legislators and their aides and that you can share with them, send those documents with a brief personal cover note. Eventually, you may even find policymakers coming to you for information, help or your point of view on new issues.

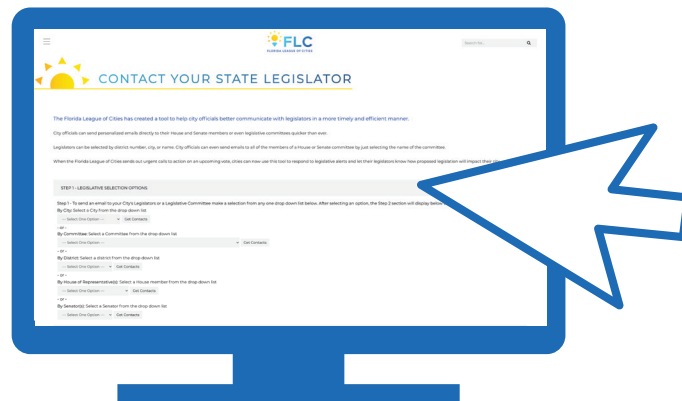


## UNSURE WHO YOUR LEGISLATORS ARE?

With more than 160 Senators and Representatives, it can certainly get confusing. The easiest way to find out which legislators represent your communities is by using the League's comprehensive [Contact Your Legislator Tool](#).

You can send personalized emails directly to your House and Senate members or even legislative committees quicker than ever. Legislators can be selected by district number, city or name. You can even send emails to all members of a House or Senate committee by just selecting the name of the committee.

And when the FLC sends out urgent calls to action on an upcoming vote, you can now use this tool to respond to legislative alerts and let your legislators know how proposed legislation will impact your city.



# KEYS TO SUCCESSFUL LOBBYING

# The term “Home Rule” does not resonate with all legislators. For some, it is simply a lack of knowledge.

For others, it is a lack of interest. And for a select few, our local interests are being overrun by special interests. We cannot let this situation deter us from our efforts to educate state leaders on Home Rule and the local impact of legislation. That's why we're asking them to trust us. Some legislators were recently local leaders themselves. Let's remind them of the importance of solving local problems with local solutions. Let's encourage them to focus on state issues and leave the local issues to those who know their communities best.

## CONNECT WITH MEMBERS OF YOUR LEGISLATIVE DELEGATION THROUGHOUT THE YEAR AND NOT JUST DURING SESSION:

- Do some research. Look for personal things you have in common, such as having children/grandchildren or attending the same school.
- Invite them to events hosted by your city or you personally.
- Send them holiday cards. The more legislators see us and hear from us, the more they will want to support us.

## UNDERSTAND THE MEANING AND PURPOSE OF HOME RULE

Home Rule was created more than 50 years ago to give cities the flexibility to create laws specific to their own unique needs. Home Rule is important because it means that decisions for your city are made by the people who love it enough to call it home.

## UNDERSTAND THE LEGISLATIVE PROCESS

The state legislative process can be very complicated. With a very compressed window of time and lots of rules, it is easy to get lost in the process. But understanding how and when your issue will be discussed allows you to have the biggest impact possible as you talk with state lawmakers.





# KEYS TO SUCCESSFUL LOBBYING



## DEFINE HOME RULE USING LOCAL EXAMPLES

How is your community unique? What local issues has your city successfully addressed, and what solutions are they working on? Being able to answer these questions will help you better understand local decision-making and be able to talk about it effectively.

## DEVELOP RELATIONSHIPS

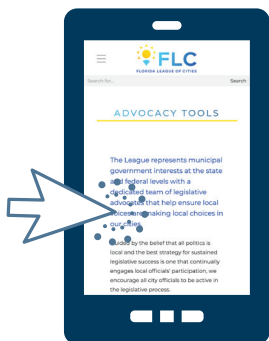
The most impactful messages come from familiar faces. The more lawmakers see your face and hear your message, the easier it will be to get a response from them when it really matters.

## BE FRIENDLY TO STAFF – THEY ARE THE GATEKEEPERS

Legislative aides, district secretaries and interns can have tremendous sway in ensuring your meeting requests, phone calls and emails get shared. Treat them with respect and kindness. Legislators are busy – especially during session. Meetings with their staff can be just as effective.

## WHAT DO YOU WANT LEGISLATORS TO DO?

Do we want them to vote in a certain way, to lobby a fellow lawmaker or to ask a question during a committee meeting? Whenever you communicate with a lawmaker, be specific in what you are asking them to do. Even if you just want to discuss general Home Rule issues, ask your state lawmaker to commit to determining the local impact of proposed legislation before considering a vote. And make sure to hold them accountable on the campaign trail, during committee weeks and throughout session. Use the *Florida League of Cities (FLC) Key Votes Summary* document to understand exactly how each legislator voted on important issues during legislative session. You can find that summary and other legislative tools at [flcities.com/advocacy-pages/resources-tools](http://flcities.com/advocacy-pages/resources-tools).







Still unsure about how best to lobby a legislator? **Watch this video** featuring FLC First Vice President Jolien Caraballo, Vice Mayor from the City of Port St. Lucie, speaking with Florida Representative Dana Trubusly about important municipal issues, and learn how to be more effective in your advocacy.

## HOLD YOUR STATE LAWMAKERS ACCOUNTABLE

Check back with your House and/or Senate members and ask them how they voted and what actions they took on the issue. Be prepared to hold them accountable during and after legislative session.

This step can be done positively, respectfully and politely by assuring the legislator that because of this issue's importance, you want to know what actions occurred, if any, and want to fully understand what happened.

## SAY THANK YOU

A brief, well-written thank-you note is always appreciated, especially for those who stand up for Home Rule. Even if we disagree with our legislators on an issue, they are more likely to listen if we find a way to praise them. Don't be afraid to take your praise to social media. A picture with an appreciative caption on Facebook or Twitter can go a long way. Be sure to tag them!

For more help on successfully advocating your message to any audience, check out the League's **Messaging Do's & Don'ts**.





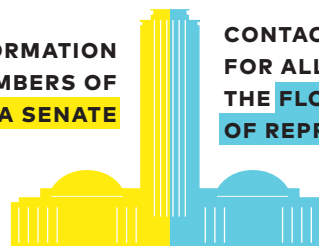
# KEYS TO LOBBYING SUCCESSFULLY VIA LETTER OR EMAIL

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Letters are an important, even critical, way to influence legislation. Letters to your state and U.S. Senators or Representatives are especially important. Alternatively, state legislators each have email addresses where you can send your thoughts.

CONTACT INFORMATION  
FOR ALL MEMBERS OF  
THE **FLORIDA SENATE**

CONTACT INFORMATION  
FOR ALL MEMBERS OF  
THE **FLORIDA HOUSE  
OF REPRESENTATIVES**



## LETTER GUIDELINES

- ▶ Make clear your position and exactly what you want your legislator to do.
- ▶ Write in your own words, and include your own thoughts. Tell how the legislation will affect your community.
- ▶ Show as much knowledge as you can, but don't worry if you're not an expert; your personal experience is the best evidence.
- ▶ Avoid sending form letters, but if you send one, be sure to personalize it with a handwritten note.
- ▶ Don't threaten, browbeat or get nasty.
- ▶ Write briefly on one subject at a time, and refer to bills by name and number.
- ▶ Don't try to become a pen pal; if you write too often, it becomes less effective.
- ▶ If you ask a question and don't get a reply, follow up with another letter asking clearly for a response.
- ▶ When a legislator votes as you asked, send a thank-you note.

### Effective letters or emails include:

- 1 **Who you are:** I am a City Commissioner/Council Member for the City of \_\_\_\_\_.
- 2 **What you want done:** We are writing to ask your support of House Bill 1234 when it comes before your Committee ... .
- 3 **What the bill does for the District:** This bill would \_\_\_\_\_.
- 4 **Who supports it in the District:** This bill is supported by a broad coalition of residents and/or business owners in your district ... .
- 5 **What you want done again, in slightly different words:** Please make this possible by voting for HB 1234 in committee and again on the House floor ... .
- 6 **Your name, address and telephone number:** Please feel free to contact me. I would be happy to answer any questions or be of other assistance in this matter.

A woman with blonde hair is sitting at a desk, smiling and looking at a laptop. She has her hand resting on her chin. The entire image is covered with a semi-transparent yellow overlay. On the left side, the text 'KEYS TO LOBBYING VIRTUALLY' is written in large, white, bold, sans-serif capital letters. A thin yellow horizontal line is positioned above the text.

# KEYS TO LOBBYING VIRTUALLY



**Stay up to date on the issues.** Working with Florida League of Cities (FLC) staff before your meeting will help ensure you have the latest status updates on an issue while also ensuring a coordinated message is provided to the legislator.

**Set up a virtual meeting with a legislator.** While meeting with a legislator in person is more difficult these days, the ability to meet remotely allows greater flexibility for legislators, so take advantage of this situation by scheduling a virtual call with them.

**Submit an op-ed to your local media outlet.** An op-ed is a great way to get out your message to your constituents as well as your local legislator. The League's experienced communications staff is available to help fine-tune an op-ed or letter to the editor before submittal.

**Boost your social media engagement by tagging the League.** Let your voice be heard on social media, and tag those legislators who might be key in promoting your issue. Tagging the League (**@flcities**) allows us to retweet and help boost your tweet/post to provide more engagement. Also, be sure to use the League's hashtag **#LocalVoices** to show your support for Home Rule.

**Use the League's Legislative Alerts to effectively communicate your position on key FLC issues.** These alerts include background information, talking points and other helpful tools.

**Become a more effective advocate by using the League's online resources.** The League's website **[flcities.com](http://flcities.com)** provides a comprehensive list of advocacy resources you can use.



A photograph of a public hearing or courtroom setting. In the foreground, a black gooseneck microphone sits on a dark wood-grain podium. The background is out of focus, showing several people seated in rows, suggesting an audience or a public hearing. The overall lighting is dim, and the image has a blueish tint.

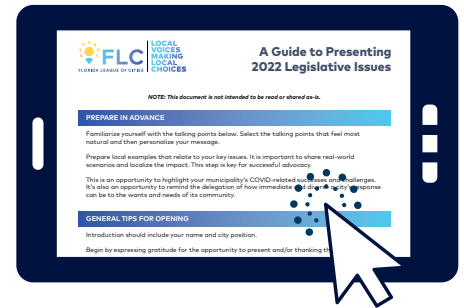
# PUBLIC TESTIMONY 101

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OK, you've signed up or been asked to testify before a legislative committee. Now what should you do? Public testimony is an effective way to help legislators understand how an issue, policy or situation affects people across the state, presents difficulties or addresses needs. How should you prepare for your appearance?

Before you testify, make sure to read the [\*Guide to Presenting FLC Legislative Issues\*](#). Using this resource is a great way to ensure you are prepared for your testimony or discussion with legislators.



Here are some additional keys to testifying successfully:

- ▶ **Research the committee prior to testimony.**
  - Who sits on the committee?
  - Does a legislator from your area serve on this particular committee?
  - Speak to members before the committee meeting.
- ▶ **Prepare your remarks prior to the meeting.**
- ▶ **Avoid duplication.**
- ▶ **Most committees will limit the time witnesses have, so expect to have 1-2 minutes to speak.**
  - Be brief and to the point. Often there are other witnesses present, and the Committee will appreciate your cooperation in allowing everyone to have an opportunity to be heard.
- ▶ **Follow these tips for making your remarks:**
  - Begin by introducing yourself to the chair and committee members and stating your purpose. For example, "Mister or Madam Chair and members of the committee, I am Mayor/Commissioner/Councilmember

\_\_\_\_\_ from the City of \_\_\_\_\_.  
I support/oppose this bill because ... ."

- Be brief and be sure your remarks are clear. **Avoid being too technical** and do not repeat previously made remarks. You do not need to be nervous or worried about how you present your testimony.
  - Be prepared for questions and comments from committee members. These questions are designed to gain additional information, but don't answer if you are not sure of the answer. Tell the members you will send a written answer to the committee, and then follow through.
- If you are asked to stay and answer questions from committee members, make sure to answer questions through the committee chair. When a legislator is finished asking their question of you, look to the committee chair for approval to begin your response. And start each response by thanking the chair for recognizing you to speak. "Thank you, Madam/ Mister Chair. I believe Home Rule is important because ... ."
- Slow down and breathe.



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# 10 TIPS FOR COMMUNICATING CONFIDENCE AND PRESENCE VIA YOUR BODY LANGUAGE

You can dress the part and say the right words – and granted, these are extremely important – but if your body language does not match your visual and verbal message, you will not be believable or credible. In other words, you will not be able to successfully communicate your message.

From the moment you walk in the door for a meeting or up to a podium to testify, your body

is telling people all about you; body language is the fastest way you can showcase confidence to others and exude a winning first impression.

Over half of the information you provide others about the connection you have with them comes from your body language or body talk. In fact, 55% of a message is conveyed by body language; 38% by the tone of voice. Yes, 93% of communication is unrelated to your words.

### **1 Stand tall and maintain a wide stance.**

Erect posture instantly identifies you as someone with something to contribute and signals that you are confident. Stand like a winner. Not only will you look more confident, but you will feel more confident. And keep in mind that if you appear confident, people will think you have something to be confident about. People accept what you project.



### **2 Keep your head level, with chin positioned properly.**

A level head indicates an assured, candid, capable nature. It might also give your voice fuller tones and make you seem to be looking at people straight in the eye. A bowed head and/or eyes studying the floor makes you look unsure, vulnerable, passive and possibly even guilty of something.

# 10 TIPS FOR COMMUNICATING CONFIDENCE AND PRESENCE VIA YOUR BODY LANGUAGE

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## 3 Walk the walk.

From the moment you walk into the committee room with dignity and easy confidence, you tell people you are someone who matters. Walking well begins with perfect posture. Keep your rib cage high and chin up to add confidence to your walk. Think tall and light, keeping your weight forward on the balls of your feet.

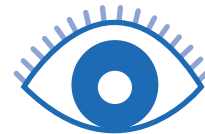


## 4 Keep hands visible.

Avoid putting both hands in your pockets. It makes you appear uninterested or bored, uncommitted and sometimes nervous. One hand is OK if the other hand is gesturing. Keeping hands open and palms facing upward indicates openness, honesty and a willingness to connect with people.

## 5 Make eye contact.

Your eyes are powerful nonverbal tools in part because you make conscious choices of how to use them and in part because they do a lot of things on their own. Not making eye contact when you meet someone for the first time is also a sign of low self-esteem or lack of self-confidence.



## 6 Use facial expressions to reinforce communication.

Your face is the focal point of conversation and interaction, so the impact of its movements and expressions is magnified. The face is a tool for communicating emotions and feelings, but it is also important for regulating and directing an interaction. Once you have started a conversation with another person, your facial expressions help to encourage or, conversely, discourage further interest and interaction. Being overly expressive, on the other hand, can detract from your credibility. In situations where you want to maximize your authority, minimize your movements and animation. When you appear calm and contained, you look more powerful.

**7 Give a warm smile.**

Smiling is a powerful and positive nonverbal cue for signaling likability and friendliness. It is especially important to smile when meeting someone or a committee since it signals a sincere interest in meeting them.

**8 Offer a firm handshake.**

A handshake can produce a higher degree of trust within a matter of seconds; the power of the handshake should never be underestimated.



**9 Create a credible, professional vocal image.**

Voice is an important part of the nonverbal behaviors and cues that you send and receive. Most people don't know or understand the nonverbal influence of their voice. Before you meet someone for the first time, it's more than likely that you have spoken to them on the telephone. Thus, the opinions they form of you are based on one thing only: your voice. It is vital, therefore, that you project the correct voice image. Speak with optimal volume, articulate clearly, avoid mumbling and avoid filler words and sloppy words. Sound confident in what you are saying, and avoid excessive apologies.



**10 Use gestures to reinforce communication.**

If you want to appear comfortable and unguarded, your gestures need to start talking when you begin to speak. Don't think about your gestures; they should appear natural and reinforce what you are saying. Hand gestures make people listen to you. Use them sparingly at key moments. When you gesture too much or too expansively, it can be distracting and detract from your message.

A photograph of a person in a light-colored suit and tie, surrounded by several microphones held by hands. The image is overlaid with a semi-transparent green filter. The text 'MEDIA RELATIONS 101: WORKING WITH THE MEDIA' is written in white, bold, sans-serif capital letters across the middle of the image. A thin yellow horizontal line is positioned below the text.

# **MEDIA RELATIONS 101: WORKING WITH THE MEDIA**



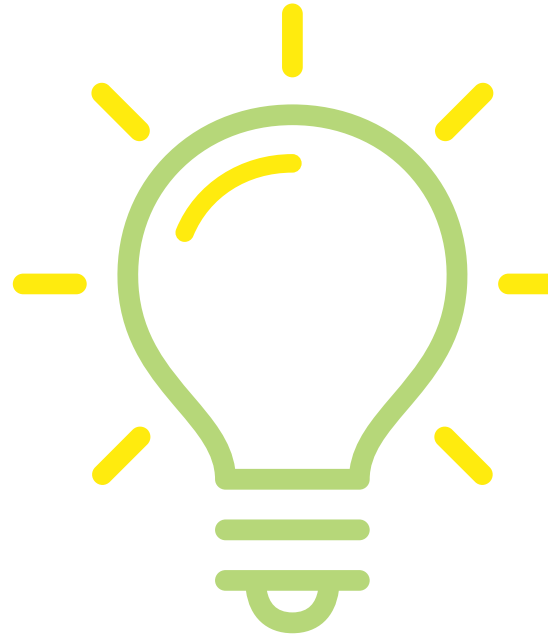
It's important to build relationships with your local media outlets and their reporters. By doing so, you make it easier to spread the word on the importance of Home Rule and establish yourself as a key resource for local government issues. Knowing how to effectively interact with the media will help make your message easier to share.

### **KNOW WHAT THEY WRITE ABOUT**

Find out which reporters cover what beats. Understand how they write and the issues they seem to cover most often. Also, check their social media feeds so you can understand what interests them outside of work, allowing you to better connect with them.

### **DON'T BURY THE MAIN IDEA**

Make your story pitch interesting and compelling. Try to grab the reporter's attention and focus on an issue their readers would be interested in. Use media tools like press releases and media advisories, and get to the point quickly in what you send. In this 24/7 news cycle, things move fast. If the reporter has to dig in your press release to find the story, you've probably already lost their attention.



# MEDIA RELATIONS 101: WORKING WITH THE MEDIA

## USE INFLUENCERS

When using a letter to the editor or an op-ed, it's important to focus on who the most appropriate person would be to author it. An elected official? A business leader? A community activist, perhaps? Choose the author wisely.



## RESPECT DEADLINES

Reporters have less time to work on stories these days because they have more stories they need to write. If they reach back out to you regarding a story you pitched, make sure to respond as quickly as possible. They are acknowledging the importance of your story by touching base, so do them and yourself a favor and help make it the best it can be by responding!

## ACCESS RESOURCE

The Florida League of Cities recently hosted a workshop on how the media landscape has changed and how municipalities can best work with the media. This [\*presentation\*](#) can help provide ideas on how you can get your city's message through the clutter and how to build relationships with local and statewide media to help tell your story.



***See the 2021 Annual  
Conference session  
presentation | When  
the Shift Hits the Fan:  
Crisis Communication***

# TRADITIONAL MEDIA TOOLS

**Media Advisory:** A media advisory is a one-page sheet that alerts reporters to an upcoming news event. It provides a compelling preview of what will be shared but not the actual news itself. It should be sent out a few days before the event and followed up with a phone call.

**Press Release:** A press release announces breaking news and should be written like a news story. To stay relevant, this tool should be sent out as soon as possible after the actual public announcement of the news you're sharing.

**Op-Ed:** An op-ed is a column or guest essay – about 500 words – published in the opinion section of the newspaper, on or opposite the editorial page. This tool should be timely, present strong arguments and be authored by a well-respected community leader considered knowledgeable on the subject.

**Letters to the Editor:** Letters to the editor are short, timely responses to recently published articles or commentary. This tool allows you to offer a short rebuttal or add a crucial missing perspective. Most letters are 150-250 words.

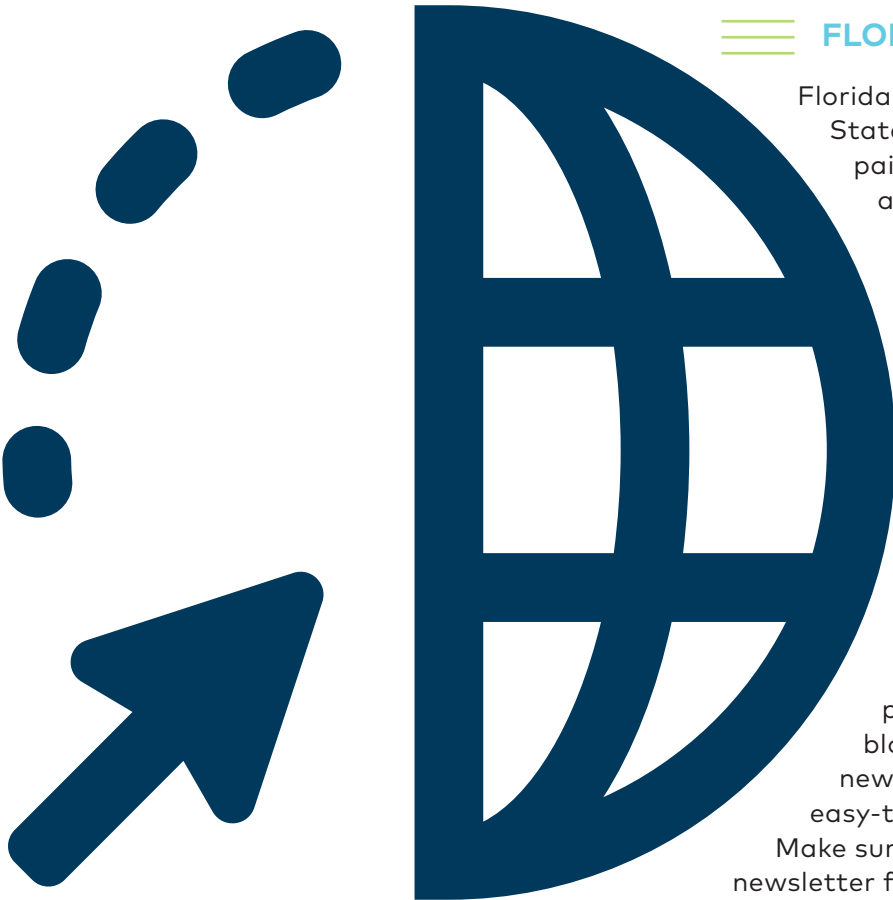


# MEDIA RESOURCES

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Florida is a busy state with more than **400 cities and 67 counties**, which means it can be tough staying up to date on the latest news and events.

Luckily, in addition to the traditional newspapers throughout the state, there are some great online media resources, websites and outlets that you can follow.



### FLORIDA POLITICS

Florida Politics offers some of the Sunshine State's most in-depth coverage of campaigns, elections, government, policy and lobbying. Make sure to sign up for their Sunburn daily newsletter, which aggregates all the stories overnight and delivers them to your inbox bright and early each weekday morning.



### SAYFIE REVIEW

This online destination for local political news aggregates stories, blogs and editorials from the state's newspapers and provides them in an easy-to-digest manner each morning.

Make sure to sign up for the Sayfie morning newsletter for an aggregation of these stories delivered to your inbox each day.



# MEDIA RESOURCES

## POLITICO (SUBSCRIPTION SERVICE)

A go-to source for news on politics and policy in power centers across every continent where access to reliable information, nonpartisan journalism and real-time tools create, inform and engage a global citizenry. Politico offers a morning e-newsletter called Politico Florida Playbook that is helpful for staying up to date.



## NEWS SERVICE OF FLORIDA (SUBSCRIPTION SERVICE)

News Service of Florida is one of the state's most comprehensive and in-depth sources of political and policy news with the largest capitol news bureau.







## FLORIDA NEWSPAPERS



Additionally, you can check out ***United States Newspaper Listing***, the official directory of U.S. newspapers, for a listing of every daily, weekly or monthly newspaper in Florida.

## FLC NEWS CLIPS AND PUBLICATIONS

Make sure you're receiving the Florida League of Cities (FLC) daily news clips package, which highlights stories from around Florida impacting municipalities and statewide stories of note, as well as other publications provided by FLC each week/month/year.



Email Mary Edenfield at  
***medenfield@flcities.com***  
to be added to our list.

## FLC WORKSHOP ON SOCIAL MEDIA

One of the easiest ways to get your story out is via social media, which allows you to tell the story in your own words. FLC recently hosted a ***workshop*** at our 2021 Annual Conference focused on social media tips, tricks and best practices for sharing your story effectively.

## 2021 Annual Conference session presentation

***Social Media: Reaching Your Residents,  
Staying In Bounds***





# ABOUT LEGISLATIVE SESSION

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The Florida Legislature meets in session every year for 60 consecutive days during what's called legislative session. Let's break down session and the different versions:

### COMMITTEE WEEKS

Legislators start committee activity about three months before the regular legislative session begins. Because Florida is a part-time legislature, this schedule is necessary to allow legislators time to work their bills through the Committee process before the regular legislative session.

### REGULAR LEGISLATIVE SESSION

The Florida Legislature meets in a 60-day regular legislative session each year. Regular legislative sessions in odd-numbered years must begin on the first Tuesday after the first Monday in March and on the second Tuesday after the first Monday in January of each even-numbered year. In recent years, the Legislature has opted to start in January in even-numbered years to allow lawmakers to be home with their families during school

spring breaks and give more time ahead of the legislative elections in the fall.

### ORGANIZATIONAL SESSION

On the 14th day following each general election, the Legislature meets for an organizational session to organize and select officers.

### SPECIAL SESSION

Special legislative sessions may be called by the Governor, by a joint proclamation of the Senate President and House Speaker, or by a three-fifths vote of all legislators. During any special session, the Legislature may only address legislative business that is within the purview of the purpose or purposes stated in the Special Session Proclamation.

### FLORIDA LEGISLATIVE PROCESS 101

Still unsure about the Florida legislative session? Then check out this video to learn even more about the ins and outs of session and to find ways to maximize your advocacy opportunities.

► [Watch the Florida Legislative Process 101](#)



# HOUSE & SENATE – HOW BILLS BECOME LAWS

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The Florida Senate and the Florida House of Representatives together are the Florida Legislature, a bicameral legislature. The Florida Legislature is one of three branches of government in Florida. The other two branches are the Executive and Judicial.

## **THE FLORIDA SENATE**

The Senate is the upper house of the state Legislature and is composed of 40 members, each elected from single-member districts across the state. Senators are elected on a partisan basis, typically to four-year staggered terms, with half of the Senate elected every two years. Senate districts are drawn based on population figures from the federal decennial census.

## **THE FLORIDA HOUSE OF REPRESENTATIVES**

The House of Representatives is the lower house of the state Legislature. It consists of 120 members elected from single-member districts, on a partisan basis, to two-year terms. Districts are drawn based on population

figures from the federal decennial census. House districts are drawn independently of Senate districts; some Representatives have districts that include parts of multiple Senate districts. Representatives' terms begin immediately upon their election. The House of Representatives Chamber is located in the State Capitol.

The House is headed by a Speaker, elected by the members of the House to a two-year term. The Senate is led by a President, elected by the members of the Senate to a two-year term. The Speaker presides over the House, and the President presides over the Senate. Both appoint committee members and committee chairs, influence the placement of bills on the calendar and rule on procedural motions in their respective chambers.

## TURNING IDEAS INTO LAWS

The Florida Legislature is authorized by the Florida Constitution to create and amend the laws of the state of Florida, subject to the Governor's power to veto legislation. To do so, legislators propose legislation in the form of bills drafted by a nonpartisan, professional staff. Successful legislation must undergo committee review, three readings on the floor of each house, with appropriate voting majorities, as required, and either be signed into law by the Governor or enacted through a veto override approved by two-thirds of the membership of each legislative house.

Its statutes, called "chapter laws," are compiled into the Laws of Florida and are called

"session laws." The Florida Statutes are the codified statutory laws of the state.

On average, the Legislature passes about 300 bills into law annually.

Legislators propose legislation in the form of bills, which are drafted or reviewed by the Bill Drafting Services of the Florida Senate and Florida House of Representatives. Upon filing, Senate bills are designated SB and assigned an even number. House bills are designated HB and are assigned an odd number.

House rules prohibit members of the Florida House of Representatives from filing more than seven bills in a regular session. This rule does not include claim bills, repealer bills or appropriation bills. There is no limit on the number of bills that can be filed by a Florida Senator.

A bill is referred to one or more committees related to the subject of the bill. The committee analyzes the bill and may conduct hearings to obtain more information about the subject of the bill. After consideration, the committee votes to amend, pass or defeat the bill. If the bill is defeated in committee, it is dead for the rest of the session. The total number of committee references a bill has can determine its fate. The lower the number of references, the fewer committees it will appear in front of and the more likely it is to pass. The higher the number, the more opportunities for it to be debated and possibly run out of time for it to pass.



If the bill passes in the committee, it moves to other committees or the full chamber. A bill is read three times in the chamber before being voted on by the full membership of the chamber.

If a bill passes in either the Senate or the House of Representatives, it is sent to the other house for review. The bill goes through the same process in the second house as it did in the first. A bill can go back and forth between the Florida Senate and the Florida House of Representatives until a consensus is reached.

If a bill is approved by both chambers of the Florida Legislature and sent to the Governor during the legislative session, it is called an act. The Governor has seven days to act. If the Governor receives the approved bill after the conclusion of the session, the Governor has 15 days to act. The Governor can sign a bill, veto a bill or take no action, in which case the bill becomes law without the Governor's signature.

A bill must make it through the entire process before the end of the session. If a bill fails at any step, it is dead and must begin the process again in the next session.

## FLORIDA HOUSE OF REPRESENTATIVES HOW AN IDEA BECOMES A LAW



### Idea

A citizen, group, or legislator has an idea for a new law. A Representative then decides that the idea should be a bill.



### House Bill Drafted

The Representative (also called a member) contacts House Bill Drafting Services and requests a bill to be drafted. The member may provide very detailed instructions or just the general idea. A staff member, called a "bill drafter," will work with the member and his or her staff until the member is satisfied and a final draft is approved. Once approved, the idea receives a bill number (odd numbers only in the House) and is called a bill for the first time.



### 1st Reading is by Publication in the House Journal

In accordance with Article III of the Florida Constitution, all bills must be read three times before being voted on. The 1st Reading is by publication of the bill number, its sponsor, and a short one paragraph description of the bill, called a title, in the House Journal. The Speaker will also refer the bill to one or more committees or subcommittees in the House. Committees and subcommittees are groups of members appointed to review specific areas of government such as education, criminal justice, and agriculture, to name a few.



### House Committee or Subcommittee Meeting

Once a bill is referred to a committee or subcommittee, it is reviewed for inclusion on an agenda. The Chair of the committee or subcommittee will decide which bills should be heard. In 2019, of the 2,506 bills filed, 1,520 "died" in a committee or subcommittee, never being heard. Once a bill has been heard and voted favorably by all of its committees or subcommittees, it is placed on a House Calendar signifying that it is available for 2nd Reading.



### 2nd Reading on the Floor by consideration of the Special Order Calendar

Once a bill is on the House Calendar, that does not mean that the bill will be heard on the floor. The House has a special committee called the Rules & Calendar Committee that will determine when and if a bill will be sent to the floor for 2nd Reading. These bills are placed on a recommended Special Order Calendar. Each Special Order Calendar is voted on prior to the House considering those bills on a specific legislative day. Once a bill has been introduced and read on the Special Order Calendar, it is explained, questions are answered about the bill, and amendments are considered. This constitutes a bill's 2nd Reading.



### 3rd Reading on the House Floor by consideration of the Third Reading Calendar

After a bill has been read a second time on the Special Order Calendar, it is taken up on 3rd Reading, generally, on a subsequent legislative day. This is the final reading of the bill prior to being voted on. Once a bill's title has been read a third time, it is explained again, questions are again permitted, and amendments may be offered; at this point, amendments may only be considered by a 2/3 vote. The final action is for debate on the bill prior to the sponsor making a closing statement. The bill is then voted on by the members of the House. Any bill not receiving a favorable vote "dies" on the floor.



### Senate Consideration

Once the bill is passed by the House, it is sent to the Senate with a "message." The Senate's process varies slightly from the House's process. The Senate may vote to pass the bill without amendments and return the bill to the House, refer the bill to a committee for consideration, or defeat the bill on the Senate floor. The Senate may decide to further amend the bill and pass it. If this happens, the bill is returned to the House.



### Return to the House

If the House has received a House bill having been passed by the Senate without amendments, it puts the bill in its final form called an "enrolled" version. The enrolled version of the bill is then sent to the Governor for consideration. If the Senate has further amended the House bill, it is returned to the House for consideration of the Senate amendments. This "back and forth" consideration of the bill is an attempt to perfect the bill's language by working out the differences, but generally ends after several exchanges by each side. At any time, either the Senate or the House may decide to abandon the effort of reaching a compromise and the bill dies. If the issue is important enough, however, the House and Senate may agree to appoint a conference committee comprised of Representatives and Senators to work out the details of the bill.



### Consideration by the Governor

Generally, if the Legislature is in session and has sent the Governor a bill, he/she has seven days to consider the bill while the Legislature remains in session. If the bill is received after the Legislature has adjourned "sine die" (the 60-day session has ended), the Governor has 15 days to consider the bill. The Governor may take one of three actions: sign the bill into law, allow the bill to become law without his/her signature, or veto the bill. If the Governor vetoes the bill, the Legislature may override his/her veto by a 2/3 vote of the Legislature during the next Session.

### KEY POINT...

At any point of consideration, the bill may "die" for that legislative session, which means it will no longer be considered.

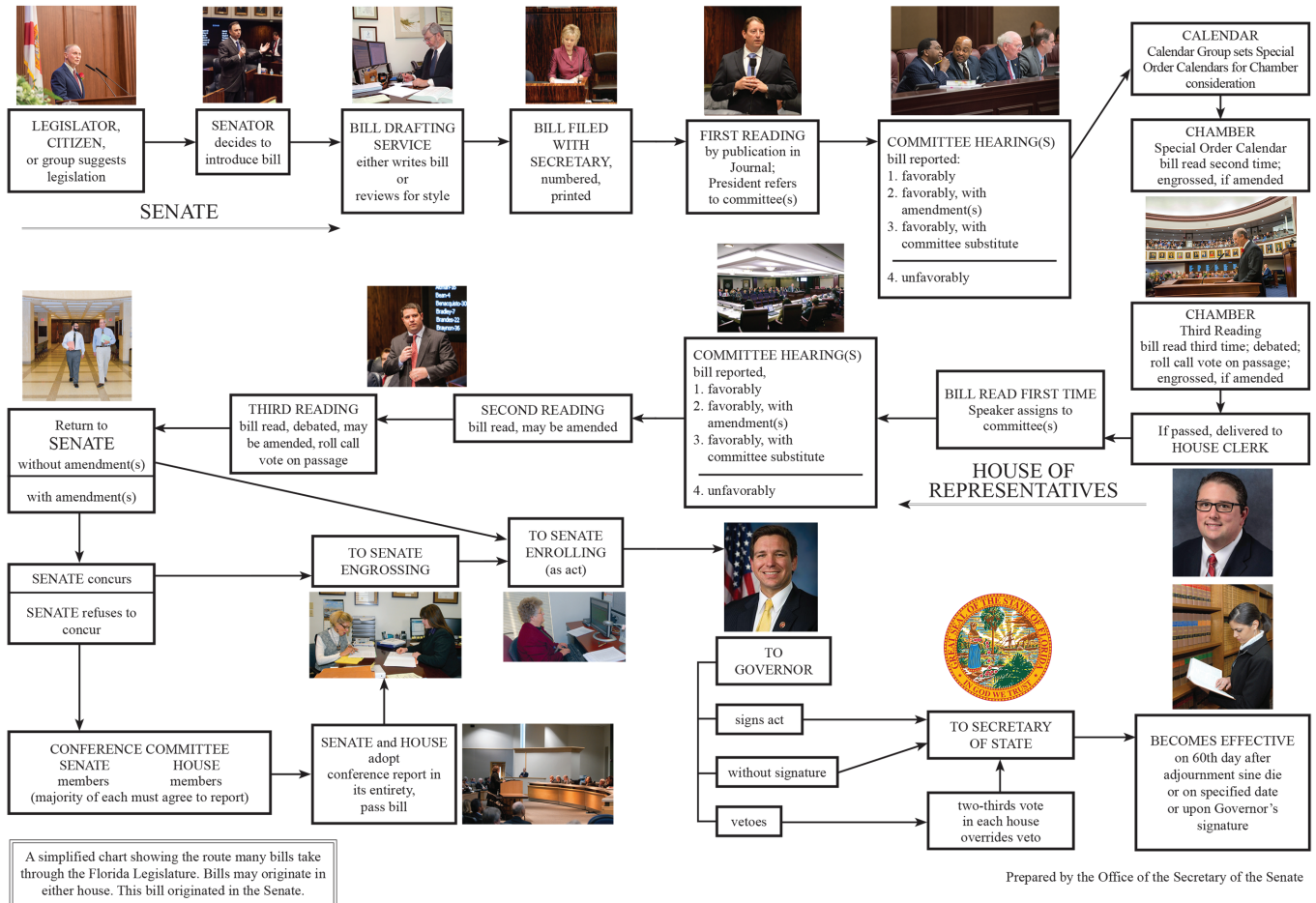


PRODUCED AND PUBLISHED BY  
THE OFFICE OF THE CLERK  
FLORIDA HOUSE OF REPRESENTATIVES  
07/29/2019



# FLORIDA SENATE

## HOW AN IDEA BECOMES A LAW



Prepared by the Office of the Secretary of the Senate

A network diagram on a dark blue background. It features several light blue square icons, each containing a white silhouette of a person. These icons are interconnected by a web of thin, light blue lines, creating a complex network structure. The icons are positioned at various points, some at the ends of lines and others in the middle, suggesting a distributed system or a community.

# CONTACT INFORMATION

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## LEGISLATORS

Not sure how to contact your Senator or Representative? Click below to find a complete list of Senators' and Representatives' contact info as well as their key staff.



[\*myfloridahouse.gov/Representatives\*](https://myfloridahouse.gov/Representatives)



[\*flsenate.gov/Senators\*](https://flsenate.gov/Senators)



[\*flcities.com/contact-your-legislator\*](https://flcities.com/contact-your-legislator)

### FLORIDA SENATE



**Location:**

409, The Capitol



**Office Mailing Address:**

404 S. Monroe St.  
Tallahassee, FL 32399-1100  
850.487.5229

# CONTACT INFORMATION

## SENATE LEADERSHIP



**President** | Wilton Simpson (R-Inverness)

**President-Designate** | Kathleen Passidomo (R-Naples)

**President Pro-Tempore** | Aaron Bean (R-Fernandina Beach)

**Majority Leader** | Debbie Mayfield (R-Indian River)

**Minority Leader** | Lauren Book (D-Plantation)

**Agriculture Chair** | Darryl Rouson (D-St. Petersburg)

**Appropriations Chair** | Kelli Stargel (R-Lakeland)

**Banking & Insurance** | Jim Boyd (R-Bradenton)

**Children, Families & Elder Affairs Chair** | Lauren Book  
(D-Plantation)

**Commerce & Tourism Chair** | Ed Hooper (R-Palm Harbor)

**Community Affairs Chair** | Jennifer Bradley (R-Orange Park)

**Criminal Justice Chair** | Jason Pizzo (D-Miami)

**Education Chair** | Joe Gruters (R-Sarasota)

**Environment & Natural Resources Chair** | Jason Brodeur  
(R-Lake Mary)

**Ethics & Education Chair** | Dennis Baxley (R-Lady Lake)

**Finance & Tax Chair** | Ana Maria Rodriguez (R-Doral)

**Government Oversight & Accountability Chair** | Jeff Brandes (R-St. Petersburg)

**Health Policy** | Manny Diaz Jr. (R-Hialeah Gardens)

**Judiciary** | Danny Burgess (R-Zephyrhills)

**Military and Veterans Affairs, Space and Domestic Security** | Tom Wright (R-Port Orange)

**Reapportionment** | Ray Rodriguez (R-Fort Myers)

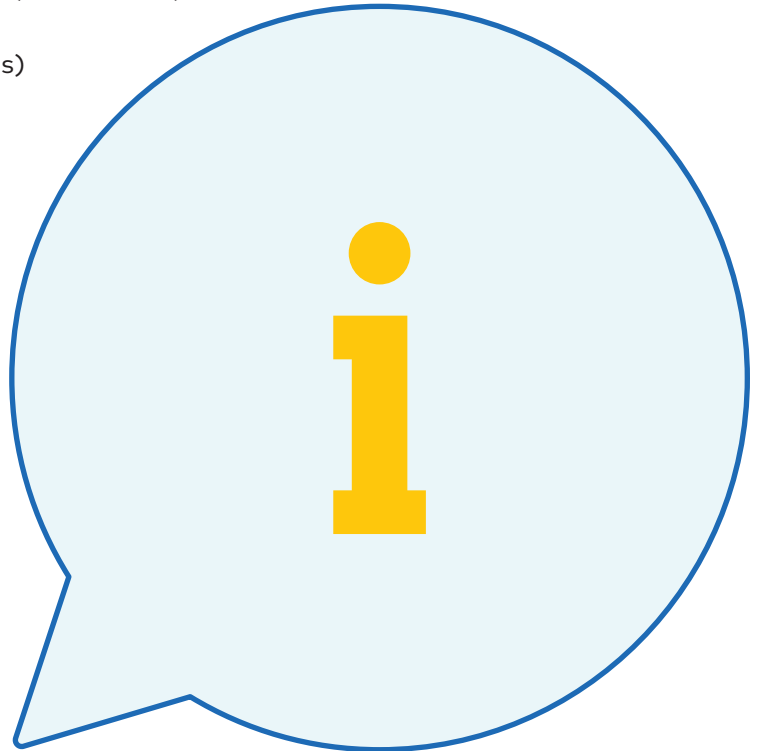
**Regulated Industries** | Travis Hutson (R-Palm Coast)

**Rules** | Kathleen Passidomo (R-Naples)

**Transportation** | Gayle Harrell (R-Stuart)

## FLORIDA HOUSE OF REPRESENTATIVES LEADERSHIP

**Speaker** | Chris Sprowls (R-Palm Harbor)  
**Speaker Pro-Tempore** | Bryan Avila (R-Miami Springs)  
**Majority Leader** | Michael Grant (R-Charlotte)  
**Minority Leader** | Bobby DuBose (D-Fort Lauderdale)  
**Appropriations Chair** | Jay Trumbull (R-Panama City)  
**Rules Chair** | Paul Renner (R-Palm Coast)  
**Commerce Chair** | Blaise Ingoglia (R-Spring Hill)  
**Congressional Redistricting Subcommittee** | Tyler Sirois (R-Merritt Island)  
**Education & Employment Chair** | Chris Latvala (R-Clearwater)  
**Health & Human Services Chair** | Colleen Burton (R-Lakeland)  
**Judiciary Chair** | Erin Grall (R-Vero Beach)  
**State Affairs Chair** | Ralph Massullo (R-Inverness)  
**Ways & Means Chair** | Bobby Payne (R-Palatka)  
**Pandemics & Public Emergencies Chair** |  
Daniel Perez (R-Miami)  
**Public Integrity & Elections Chair** | Daniel Perez  
(R-Miami)  
**Redistricting Chair** | Tom Leek  
(R-Daytona Beach)  
**State Legislative Redistricting Committee** |  
Cord Byrd (R-Jacksonville Beach)





# CONTACT INFORMATION

## DIRECTORY OF THE FLORIDA HOUSE OF REPRESENTATIVES AND KEY STAFF

**Location:**

420, The Capitol

**Office Mailing Address:**

402 S. Monroe St.  
Tallahassee, FL 32399-1300  
850.717.5000



## FLORIDA KEY STATE AGENCIES

**Florida Department of Business & Professional Regulation**

2601 N. Blair Stone Road  
Tallahassee, FL 32399-2100  
850.487.1395

**Florida Department of Economic Opportunity**

107 E. Madison St.  
Caldwell Building  
Tallahassee, FL 32399-4120  
850.245.7105

**Florida Division of Emergency Management**

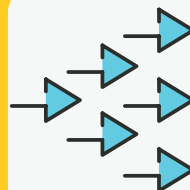
2555 Shumard Oak Blvd.  
Tallahassee, FL 32399-2100  
850.815.4000

**Florida Department of Environmental Protection**

900 Commonwealth Blvd.  
Tallahassee, FL 32399-3000  
850.245.2118

**Florida Department of Health**

4052 Bald Cypress Way  
Tallahassee, FL 32399  
850.245.4444



For a complete listing of all  
of Florida's state agencies,  
[CLICK HERE.](#)



# FLORIDA LEAGUE OF CITIES LOBBYING TEAM

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## Amber Hughes, Senior Legislative Advocate

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Budgeting Telecommunications

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Records/Meetings Ordinance/Code  
Enforcement

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Growth Management/Community  
Redevelopment/Insurance

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Management

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☎ 850.701.3692

Environmental/Water/General Utilities/  
Ethics and Elections/Rights of Way





# LEGISLATIVE GLOSSARY

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**ACT**

A bill that has passed both houses of the Legislature.

**ADJOURNMENT SINE DIE**

Motion to adjourn sine die concludes a legislative session.

**ADOPTION**

Refers to favorable action by a chamber on an amendment, motion, resolution or memorial.

**AMENDMENT**

Makes a change to a bill after the bill has been filed. This change can happen in committee or on the floor of the House or Senate.

**BILL**

Legislation, including joint resolutions, concurrent resolutions, memorials or other measures upon which a council or committee may be required to report.

**BILL NUMBER**

Bills are issued a number based on the order they are filed and received by bill drafting. House bills receive odd numbers, while Senate bills receive even numbers.

**CHAIR**

The presiding officer for a floor session or committee meeting.

**CLAIMS BILL**

Presents a claim for compensation for an individual or entity for injuries caused by negligence or error on the part of a public office, local government or agency.

**COMMITTEE**

A panel of legislators appointed by the Senate President or Speaker of the House to perform specific duties, such as considering legislation and conducting hearings and/or investigations.

# LEGISLATIVE GLOSSARY

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## COMMITTEES OF REFERENCE

Each bill is assigned to committees after it is filed. Often, the more committees a bill is assigned is an indication of its chances to pass or fail.

## COMPANION BILL

Bills introduced in the House and Senate that are identical or substantially similar in wording.

## "DIED IN COMMITTEE"

Refers to when a bill is not heard on the floor of the respective chamber in which it was introduced. A bill must pass all committees of reference or be pulled from remaining committees in order to pass. A bill that dies in committee fails to pass each of its committee references during committee weeks and session.

## ENGROSSED BILL

The version of a bill that incorporates adopted floor amendments, which were added subsequently to the bill passing its committees of reference. The revision is done in the house of origin and engrossed under the supervision of the Secretary of the Senate or the Clerk of the House.

## ENROLLED BILL

Once a bill has passed, it is enrolled in the house of origin. After that piece of legislation is enrolled and signed by officers of both houses (President and Speaker), it is sent to the Governor for action and transmittal to the Secretary of State. An enrolled bill may be signed by the Governor and enacted into law or vetoed.

## FLORIDA STATUTES

An edited compilation of general laws of the state.

## GENERAL BILL

A bill of general or statewide interest or whose provisions apply to the entire state.

## HOUSE RESOLUTION

A measure expressing the will of a legislative house on a matter confined to that house, dealing with organizational issues or conveying the good wishes of that chamber. Often used to congratulate Floridians or recognize significant achievements.

## INTERIM

Refers to the period between the adjournment sine die of a regular session and the convening of the next regular session.

## JOINT RESOLUTION

Used to propose amendments to the Florida Constitution. They are also the form of legislation used for redistricting state legislative seats.

## LAW

An act becomes a law after it has been approved and signed by the Governor; without the Governor's signature after his or her ability to veto the act within seven days of presentation; or after the Legislature overrides the Governor's veto by a vote of two-thirds in each house.

## LOCAL BILL

A bill that applies to an area or group that is less than the total population of the state.

## MEMORIAL

A type of concurrent resolution addressed to an executive agency or another legislative body, usually Congress, which expresses the sentiment of the Florida Legislature on a matter outside its legislative jurisdiction.

## **MESSAGE**

The houses of the Legislature send formal communications to each other regarding action taken on bills. This measure is usually reserved for the last couple of weeks of a legislative session. If a bill dies in messages, it has passed each chamber in form; however, one of the two chambers has made a change or amended the bill so that the two versions are no longer identical.

## **PROPOSED COMMITTEE BILL (PCB)**

A draft legislative measure taken up by a committee for the purpose of considering whether or not to introduce it in the name of the committee.

## **PROVISO**

Language used in a general appropriations bill to qualify or restrict the way in which a specific appropriation is to be expended.

## **REFERENDUM**

A vote by the citizens upon a measure that has been presented to them for either approval or rejection.

## **REPEAL**

The deletion by law of an entire section, subsection or paragraph of language from the Florida statutes.

## **SESSION**

Regular session: the annual session that begins on the first Tuesday after the first Monday in March of each odd-numbered year, and on the first Tuesday after the first Monday in March, or such other date as may be fixed by law, of each even-numbered year, for a period not to exceed 60 consecutive days.

There is no limit on the subject matter that may be introduced in a regular session.

Special session: special sessions may be called by proclamation of the Governor, by joint proclamation of the House Speaker and the Senate President or by the members of the Legislature for the purpose of considering specific legislation and shall not exceed 20 consecutive days unless extended by a three-fifths vote of each house. For members of the Legislature to call a special session, three-fifths of the members of both houses must vote in favor of calling a special session.

## **SPECIAL ORDER CALENDAR**

A list of bills determined by the Rules Chairman considered to be of high importance and priority scheduled for consideration in a specific order during a floor session on a particular day.

## **SPONSOR**

The legislator or committee that files a bill for introduction.

## **TEMPORARILY POSTPONED**

A motion can be made in the chamber or in committee to temporarily defer a consideration of a measure.

## **VETO**

An objection by the Governor to an act passed by the Legislature. Vetoes can be overridden by vote of two-thirds of the membership of each chamber. A line item veto may be performed by the Governor of specific measures in the general appropriations bill (the budget).





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# CONNECT WITH THE FLORIDA LEAGUE OF CITIES ON SOCIAL MEDIA







# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Action Item

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Jessica Leavins, Administrative Services Director  
DATE: 1/19/2022  
SUBJECT: Waiver of Purchasing Policy- Firefighter medical screenings

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**BACKGROUND:**

As part of the collective bargaining agreement with the Local 2680 International Association of Firefighters, the City of Crestview agreed to provide our Firefighters with an annual on-site physical, which must include a cancer assessment, cardiopulmonary assessment, and fitness evaluation, blood testing, and respiratory mask fit testing.

**DISCUSSION:**

Staff is requesting a waiver of the purchasing policy as it pertains to the request for bid on purchases over \$15,001. The estimated cost of these services for all 48 certified Firefighters is \$20,000. These services are provided by a select number of companies throughout the United States and Lifescan Wellness is the only company in Florida providing these services. Lifescan Wellness is based in Tampa, Florida and specializes in Public Safety physicals. They come highly recommended by other agencies and currently hold contracts with several other municipalities, such as Jacksonville and Panama City Beach.

Additionally, staff researched alternative companies to ensure the best possible price. Other companies contacted were Concentra Occupational Health and Worksite Medical; Concentra is not currently conducting onsite exams due to the pandemic and Worksite Medical provided a quote for services at almost twice the cost of Lifescan.

**GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Communication-* To engage, inform and educate the public and staff

**FINANCIAL IMPACT**

The cost of services is included in the 2022 budget. Services are estimated at \$20,000.

**RECOMMENDED ACTION**

Staff requests motion to waive the purchasing policy as it pertains to requests for bid and allow staff to move forward with services from LifeScan Wellness.

**Attachments**

None



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Action Item

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Maryanne Schrader, City Clerk  
DATE: 1/10/2022  
SUBJECT: Approval of draft minutes for 10/11/21, 10/14/21, 10/18/21, 11/8/21 and 1/10/22

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## **BACKGROUND:**

## **DISCUSSION:**

## **GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Infrastructure-* Satisfy current and future infrastructure needs

*Communication-* To engage, inform and educate public and staff

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Community Character-* Promote desirable growth with a hometown atmosphere

*Safety-* Ensure the continuous safety of citizens and visitors

*Mobility-* Provide safe, efficient and accessible means for mobility

*Opportunity-* Promote an environment that encourages economic and educational opportunity

*Play-* Expand recreational and entertainment activities within the City

*Community Culture-* Develop a specific identity for Crestview

## **FINANCIAL IMPACT**

## **RECOMMENDED ACTION**

Request motion to approve the City Council minutes of October 11, 2021, October 14, 2021 and October 18, 2021.

## **Attachments**

1. 10112021 CCM
2. 10142021 CC Special Meeting - CLERK INTERVIEWS-ETHICS TRAINING
3. 10182021 CC Special Government Week
4. 2021.11.08 CCM Draft
5. 01102022 CCM Regular Meeting Minutes

**City Council Meeting Minutes - Draft**  
**October 11, 2021**  
**6:00 p.m.**  
**Council Chambers**

The Regular Meeting of the Crestview City Council was called to order at 6:00 P.M. Members present were Shannon Hayes, Joe Blocker, Andrew Rencich, Cynthia Brown, and Doug Capps. Also present were the honorable Mayor JB Whitten, City Clerk Elizabeth Roy, City Manager Tim Bolduc, City Attorney Mr. Holloway, department heads and members of the press.

**1. Called to Order**

This meeting was called to order by the Honorable Mayor Whitten at 6:00 p.m.

**2. Invocation and Pledge of Allegiance**

The invocation and pledge led by Pastor Edward J. Parker of First Church of God in Christ.

**3. Open Policy making and legislative session**

**4. Approval of Agenda**

Mayor Whitten asked if there were any changes or objections to the current Agenda.

There were no objections or changes to Agenda it was approved by unanimous consent.

**5. Presentations and Reports**

**5.1 Presentation by Matrix Facilities Study**

A representative of Matrix presented the assessment of the Facilities Study that Matrix conducted for the City of Crestview.

Discussion and questions ensued throughout the presentation.

**6. Consent Agenda**

**6.1 Library Interlocal Agreement**

**6.2 Equipment Purchase for the Golf Course**

Mayor Whitten asked for action by Council.

A motion made by Ms. Brown to approve the Consent Agenda as presented. Seconded by Mr. Hayes with 5 yeas from Ms. Brown, Mr. Hayes, Mr. Blocker, Mr. Rencich, Mr. Capps, 0 nays, motion carried.

**7. Public Hearings- Ordinances on Second Reading**

**8. Ordinances on First Reading**

**8.1 Ordinance 1836 (Chickens)**

Mr. Bolduc, City Manager asked the City Clerk to read Ordinance 1836 by title.

Ms. Roy, City Clerk stated, "Ordinance 1836 reads by title:

ORDINANCE: 1836

AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA, PROVIDING FOR COMPLIANCE WITH STATE OF FLORIDA STATUTE; PROVIDING FOR THE AMENDMENT OF CHAPTER 10 – ANIMALS, SECTION 10-9. – BARNYARD ANIMALS; PROVIDING FOR AUTHORITY; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER’S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF ALL ORDINANCES OR PARTS OF ORDINANCES IN CONFLICT HERewith; AND PROVIDING FOR AN EFFECTIVE DATE

This is the First Reading of Ordinance 1836.”

Mr. Bolduc, City Manager stated that the following the request of the Council, staff researched how adjacent jurisdictions handle the keeping of chickens, as well as discussed potential undesirable consequences that the keeping of chickens could have on the public specific to the culture and character of the community in the City of Crestview.

A brief discussion ensued.

Mayor Whitten asked for action by Council.

A motion made by Mr. Rencich to adopt Ordinance 1836 on First Reading and send to Second Reading. Seconded by Mr. Capps with 5 yeas from Mr. Rencich, Mr. Capps, Ms. Brown, Mr. Blocker, Mr. Hayes, with 0 nays, motion carried.

**8.2 Ordinance 1832 Redstone Avenue Annexation**

Mr. Schwendt, GIS Analyst/Planner stated that the next three ordinances 1832, 1833 and 1834 are for the annexation for Redstone Avenue.



Mr. Schwendt, GIS Analyst/Planner asked the City Clerk to read Ordinance 1832 by title.

Ms. Roy, City Clerk stated, "Ordinance 1832 reads by title:

**ORDINANCE: 1832**

AN ORDINANCE ANNEXING TO THE CITY OF CRESTVIEW, FLORIDA, ± 19.69 ACRES OF CONTIGUOUS LANDS LOCATED IN SECTION 21, TOWNSHIP 3 NORTH, RANGE 23 WEST, AND BEING DESCRIBED AS SET FORTH HEREIN; PROVIDING FOR AUTHORITY; PROVIDING FOR LAND DESCRIPTION; PROVIDING FOR BOUNDARY; PROVIDING FOR LAND USE AND ZONING DESIGNATION; PROVIDING FOR AMENDMENT TO THE BASE, LAND USE AND ZONING MAPS; PROVIDING FOR A COMPREHENSIVE PLAN AMENDMENT; PROVIDING FOR FILING WITH THE CLERK OF CIRCUIT COURT OF OKALOOSA COUNTY, THE CHIEF ADMINISTRATIVE OFFICER OF OKALOOSA COUNTY AND THE FLORIDA DEPARTMENT OF STATE; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF CONFLICTING CODES AND ORDINANCES; AND PROVIDING FOR AN EFFECTIVE DATE

This is the First Reading of Ordinance 1832."

Mr. Schwendt, GIS Analyst/Planner stated on August 23, 2021, staff received an application to annex and to amend the comprehensive plan and zoning designations for property located on Redstone Avenue. The subject property is currently located within unincorporated Okaloosa County with a future land use and zoning designation of Low Density Residential and Residential-1, respectively. The Planning and Development Board recommended approval of the request on October 4, 2021.

A brief discussion ensued.

Mayor Whitten asked for action by Council.

A motion was made by Mr. Capps to adopt Ordinance 1832 on First Reading and move to Second Reading. Seconded by Ms. Brown with 5 yeas from Mr. Capps, Ms. Brown, Mr. Hayes, Mr. Blocker, Mr. Rencich with 0 nays, motion carried.

**8.3 Ordinance 1833 Redstone Avenue Comprehensive Plan**

Mr. Schwendt, GIS Analyst/Planner asked the City Clerk to read Ordinance 1833 by title.

Ms. Roy, City Clerk stated, "Ordinance 1833 reads by title,

**ORDINANCE: 1833**

AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA, AMENDING ITS ADOPTED COMPREHENSIVE PLAN; PROVIDING FOR AUTHORITY; PROVIDING FOR FINDINGS OF FACT; PROVIDING FOR PURPOSE; PROVIDING FOR CHANGING THE FUTURE LAND USE DESIGNATION FROM OKALOOSA COUNTY LOW DENSITY RESIDENTIAL TO RESIDENTIAL ON APPROXIMATELY 19.69 ACRES, MORE OR LESS, IN SECTION 21, TOWNSHIP 3 NORTH, RANGE 23 WEST; PROVIDING FOR FUTURE LAND USE MAP AMENDMENT; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF CONFLICTING CODES AND ORDINANCES; AND PROVIDING FOR AN EFFECTIVE DATE

This is the First Reading of Ordinance 1833.”

Mayor Whitten asked for action by Council.

A motion made by Mr. Blocker to adopt Ordinance 1833 on First Reading and move to Second Reading. Seconded by Mr. Hayes with 5 yeas from Mr. Blocker, Mr. Hayes, Ms. Brown, Mr. Rencich, Mr. Capps, with 0 nays, motion carried.

#### **8.4 Ordinance 1834 Redstone Avenue Rezoning**

Mr. Schwendt, GIS Analyst/Planner asked the City Clerk to read Ordinance 1834 by title.

Ms. Roy, City Clerk stated, “Ordinance 1834 reads by title:

#### **ORDINANCE: 1834**

AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA, PROVIDING FOR THE REZONING OF 19.69 ACRES, MORE OR LESS, OF REAL PROPERTY, LOCATED IN SECTION 21, TOWNSHIP 3 NORTH, RANGE 23 WEST, FROM THE OKALOOSA COUNTY RESIDENTIAL-1 ZONING DISTRICT TO THE SINGLE AND MULTIFAMILY DWELLING DISTRICT (R-3) ZONING DISTRICT; PROVIDING FOR AUTHORITY; PROVIDING FOR THE UPDATING OF THE CRESTVIEW ZONING MAP; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF CONFLICTING CODES AND ORDINANCES; AND PROVIDING FOR AN EFFECTIVE DATE

This is the First Reading of Ordinance 1834.”

Mr. Schwendt, GIS Analyst/Planner stated that on August 23, 2021, staff received an application to annex and to amend the comprehensive plan and zoning designations for property located on Redstone Avenue. The subject property is currently located within unincorporated Okaloosa County with a future land use and zoning designation of Low Density Residential and

Residential-1, respectively. The application requests the Single and Multi-Family Dwelling District (R-3) zoning designation for the property. The Planning and Development Board recommended approval of the request on October 4, 2021.

Mayor Whitten asked for action by Council.

A motion made by Mr. Hayes to adopt Ordinance 1834 on First Reading and move to Second Reading. Seconded by Mr. Blocker with 5 yeas from Mr. Hayes, Mr. Blocker, Mr. Rencich, Ms. Brown, Mr. Capps, with 0 nays, motion carried.

## **9. Resolutions**

### **9.1 Resolution 2022-01 Abandonment of three sewer utility easements within the Crestview Commons Development**

Mr. Bolduc, City Manager stated that this resolution is to allow the city to abandon sewer utility easements on the property, this is a standard practice and then he asked the City Clerk to read the Resolution by title.

Ms. Roy, City Clerk stated, "Resolution 2022-1 reads by title:

#### **RESOLUTION: 2022- 1**

**A RESOLUTION OF THE CITY OF CRESTVIEW, FLORIDA, VACATING AND ABANDONING CERTAIN EASEMENTS MORE SPECIFICALLY DESCRIBED HEREIN; PROVIDING FOR RECORDING OF THIS RESOLUTION WITH THE CLERK OF THE CIRCUIT COURT OF OKALOOSA COUNTY; AND PROVIDING FOR AN EFFECTIVE DATE**

Mayor Whitten asked for action by Council.

A motion made by Mr. Blocker to adopt Resolution 2022-1. Seconded by Mr. Rencich with 5 yeas from Mr. Blocker, Mr. Rencich, Mr. Hayes, Mr. Capps, Ms. Brown, with 0 nays, motion carried.

## **10. Action Items**

## **11. City Clerk Report**

### **11.1 Upcoming Events**

Ms. Roy updated the Council on the upcoming City Clerk interviews and the ethics training.

### **11.2 November and December**

Ms. Roy, City Clerk informed Council that there will be no seconded meeting in November or December unless the urgency arises.

## **12. City Manager Report**

### **12.1 City Clerk Candidate Discussion**

Mr. Bolduc, City Manager updated on the Council on the process of coming up with three candidates for the Council to interview for the appointment of City Clerk. He gave a brief overview of the candidates and spoke about the upcoming interview process for the final three.

A brief discussion ensued.

Council gave a consensus to interview the local candidates first on Thursday.

### **12.2 City Manager Updates**

Mr. Bolduc, City Manager gave an update on the events/happenings with the different departments in the city, including the golf course.

## **13. Comments from the Mayor and Council**

Mr. Capps shared information from the TDC meeting that he attended.

Ms. Brown thanked the employees for doing their job especially in the parks department.

Mr. Hayes stated that he was looking forward to the upcoming parade.

Mayor Whitten spoke about the upcoming events for Government Week 2021.

## **14. Comments from the Audience**

## **15. Adjournment**

This meeting was adjourned by Mayor Whitten at 7:49 p.m.

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Submitted by Natasha Peacock  
On behalf of the office of the City Clerk

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J B Whitten, Mayor

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Maryanne Schrader, City Clerk

Minutes approve this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

**City Council Special Meeting Minutes**  
**October 14, 2021**  
**9:00 a.m.**  
**Council Chambers**

The Regular Meeting of the Crestview City Council was called to order at 9:00 A.M. Councilmembers present were Shannon Hayes, Joe Blocker (arrived after second interview), Andrew Rencich, Cynthia Brown, and Doug Capps. Also present were the honorable Mayor JB Whitten, City Clerk Elizabeth Roy, City Manager Tim Bolduc, City Attorney Mr. Holloway, department heads and members of the press.

**1. Called to Order**

This meeting was called to order by the Honorable Mayor Whitten at 9:00 a.m.

**2. Pledge of Allegiance**

The Pledge of Allegiance to the flag was led by Councilmember Rencich.

**3. Open Meeting**

**4. Approval of Agenda**

Mayor Whitten noted that Councilmember Blocker is not in attendance for this meeting and asked if there were any changes or objections to the current agenda.

There were no objections or changes to the agenda, and it was approved by unanimous consent.

**5. Action Items**

**6. City Clerk Candidate Interviews**

**6.1 Interviews**

Mr. Bolduc, City Manager explained the interview process for the appointed City Clerk position. He informed Council that Mr. Blocker was on his way and that Council would have to determine whether or not he would be able to vote or interview the candidates.

Council gave a consensus for Mr. Blocker not to have any action to interview or to vote. Council interviewed both candidates starting with Ms. Lisa Price and concluding with Ms. Maryanne Schrader.

**6.2 Discussion/Selection**

Councilmember J. Blocker arrived.

A discussion ensued with Council about the candidates for the City Clerk position.

Motion by Councilmember A. Rencich and seconded by Councilmember S. Hayes to select Ms. Schrader for the appointed City Clerk position and to allow the City Manager and Mayor to negotiate salary and a starting date. Yeas: 4, Hayes, Brown, Capps, and Rencich; Nays: 0. Motion carried.

Councilmember J. Blocker did not participate in the selection process.

**7. Comments from the Audience**

**8. Comments from the Mayor and Council**

**9. Adjournment**

This meeting was adjourned by Mayor Whitten at 10:01 a.m.

Minutes approve this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

Minutes taken by N. Peacock  
On behalf of the City Clerk

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J B Whitten  
Mayor

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Minutes submitted by,  
Maryanne Schrader, City Clerk



**City Council Meeting Minutes - Draft**  
**October 18, 2021**  
**6:00 p.m.**  
**Warrior's Hall**

The City Government Week Special Meeting of the Crestview City Council was called to order at 6:00 p.m. Councilmembers present were Shannon Hayes, Joe Blocker, Andrew Rencich, Cynthia Brown, and Doug Capps. Also present were Mayor JB Whitten, City Clerk Elizabeth Roy, City Manager Tim Bolduc, City Attorney Mr. Holloway, department heads and members of the press. This meeting was held at Warrior's Hall for the Government Week Celebration.

**1. Called to Order**

This meeting was called to order by Mayor Whitten at 6:00 p.m.

**2. Invocation and Pledge of Allegiance**

The invocation was led by Pastor Mark Broadhead, First Presbyterian Church of Crestview and Police Chaplain with the pledge led by a representative of Boy Scout Troop 30.

**3. Open Policy making and legislative session**

**4. Approval of Agenda**

Mayor Whitten asked if there were any changes or objections to the current Agenda.

There were no objections or changes to the agenda, and it was approved by unanimous consent.

**5. Presentations and Reports**

**5.1 Heroes Awareness Week**

Mayor Whitten read a proclamation honoring the hard work and devotion of First Responders.

**5.2 Proclamation- Pharmacy Week**

Mayor Whitted read a proclamation for the support of Pharmacy Week.

**5.3 Presentation of Grand Piano Plaque**

Mayor Whitten presented Mr. Bob Allen a plaque on the behalf of the work of his late wife Georgiana "GiGi" Allen founder of the Friends of the Arts. Mr. Allen accepted the plaque and gave a brief speech.

**5.4 Employee Service Awards**

**1. Anna Florence- Library, 35 years**

Mayor Whitten recognized Ms. Florence for her thirty-five years of service with the City of Crestview and presented her with a plaque.

**2. Chuck Powell- 30 years**

Mayor Whitten recognized Mr. Powell for his thirty years of service with the City of Crestview and presented him with a plaque.

**6. Consent Agenda**

**6.1 Resolution 2021-15 Informational Change Only**

Mayor Whitten asked for action by Council.

**Motion** by Councilmember Hayes and seconded by Councilmember Blocker to approve the Consent Agenda. Ayes: 5; Councilmembers: Hayes, Blocker, Rencich, Brown, Capps. Nays: 0. Motion carried.

**7. Public Hearings- Ordinances on Second Reading**

**7.1 Ordinance 1832 Redstone Avenue Annexation**

Mr. Bolduc, City Manager, asked the City Clerk to read Ordinance 1832 by title.

City Clerk E. Roy stated, "Ordinance 1832 reads by title:

**ORDINANCE: 1832**

**AN ORDINANCE ANNEXING TO THE CITY OF CRESTVIEW, FLORIDA, ± 19.69 ACRES OF CONTIGUOUS LANDS LOCATED IN SECTION 21, TOWNSHIP 3 NORTH, RANGE 23 WEST, AND BEING DESCRIBED AS SET FORTH HEREIN; PROVIDING FOR AUTHORITY; PROVIDING FOR LAND DESCRIPTION; PROVIDING FOR BOUNDARY; PROVIDING FOR LAND USE AND ZONING DESIGNATION; PROVIDING FOR AMENDMENT TO THE BASE, LAND USE AND ZONING MAPS; PROVIDING FOR A COMPREHENSIVE PLAN AMENDMENT; PROVIDING FOR FILING WITH THE CLERK OF CIRCUIT COURT OF OKALOOSA COUNTY, THE CHIEF ADMINISTRATIVE OFFICER OF OKALOOSA COUNTY AND THE FLORIDA DEPARTMENT OF STATE; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF CONFLICTING CODES AND ORDINANCES; AND PROVIDING FOR AN EFFECTIVE DATE**

City Clerk E. Roy stated this is the Second Reading of Ordinance 1832.

Mr. Bolduc, City Manager stated that there have been no changes from the First Reading, October 11<sup>th</sup>. The subject property is currently located within unincorporated Okaloosa County with a future land use and zoning designation of Low Density Residential and Residential-1, respectively.

Mayor Whitten asked for action by Council.

**Motion** by Councilmember Hayes and seconded by Councilmember Blocker to approve the Consent Agenda. Ayes: 5; Councilmembers: Hayes, Blocker, Rencich, Brown, Capps. Nays: 0. Motion carried.

**8. Ordinances on First Reading**  
**8.1 Ordinance 1836 (Chickens)**

Mr. Bolduc, City Manager asked the City Clerk to read Ordinance 1836 by title.

City Clerk E. Roy stated, "Ordinance 1836 reads by title:

**ORDINANCE: 1836**

**AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA, PROVIDING FOR COMPLIANCE WITH STATE OF FLORIDA STATUTE; PROVIDING FOR THE AMENDMENT OF CHAPTER 10 – ANIMALS, SECTION 10-9. – BARNYARD ANIMALS; PROVIDING FOR AUTHORITY; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER’S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF ALL ORDINANCES OR PARTS OF ORDINANCES IN CONFLICT HEREWITH; AND PROVIDING FOR AN EFFECTIVE DATE**

City Clerk E. Roy stated this is the First Reading of Ordinance 1836.

Mr. Bolduc, City Manager stated that this is the second First Reading due to a discrepancy with the original ordinance.

Mayor Whitten asked for action by Council.

**Motion** by Councilmember Hayes and seconded by Councilmember Blocker to approve the Consent Agenda. Ayes: 5; Councilmembers: Hayes, Blocker, Rencich, Brown, Capps. Nays: 0. Motion carried.

**9. Resolutions**

**9.1 Resolution Budget Amendment for Quarter ending 09/30/2021**

Mr. Bolduc, City Manager noted that this was the final budget amendment for the fiscal year, he then asked the City Clerk to read the Resolution by title.

City Clerk E. Roy stated, "Resolution 2022-02 reads by title:

**RESOLUTION 2022-02**

**A RESOLUTION OF THE CITY OF CRESTVIEW CALLING FOR A REFERENDUM ON THE ANNEXATION OF CERTAIN PROPERTY KNOWN AS FOXWOOD ESTATES AND SURROUNDING AREA MORE PARTICULARLY DESCRIBED HEREIN, ON NOVEMBER 3, 2020; PROVIDING FOR A BALLOT QUESTION; AND PROVIDING AN EFFECTIVE DATE**

Mayor Whitten asked for action by Council.

**Motion** by Councilmember Hayes and seconded by Councilmember Blocker to approve the Consent Agenda. Ayes: 5; Councilmembers: Hayes, Blocker, Rencich, Brown, Capps. Nays: 0. Motion carried.

**10. Action Items**

**11. Recognition of Organizations**

The Mayor and Council recognized each of the thirty organizations in attendance and gave each time for remarks.

**12. City Clerk Report**

**13. City Manager Report**

**14. Comments from the Mayor and Council**

**15. Comments from the Audience**

**16. Adjournment**

This meeting was adjourned by Mayor Whitten at 8:06 p.m.

**Minutes approve this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.**

Minutes taken by N. Peacock,  
On behalf of the City Clerk

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**Maryanne Schrader**  
**City Clerk**

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**J B Whitten**  
**Mayor**

**City Council  
Minutes - Draft  
November 8, 2021  
6:00 PM  
Council Chambers**

The Regular Meeting of the Crestview City Council was called to order at 6:00 p.m. Members present: Shannon Hayes, Joe Blocker, Andrew Rencich, Cynthia Brown, and Doug Capps. Also present were the honorable Mayor JB Whitten, City Clerk Elizabeth Roy, City Manager Tim Bolduc, City Attorney Mr. Holloway, department heads and members of the press.

**1. Called to Order**

This meeting was called to order by the Honorable Mayor Whitten at 6:00 p.m.

**2. Invocation and Pledge of Allegiance**

The invocation and pledge led by Pastor Clint Nelson of Lifepoint Church.

**3. Open Policy making and legislative session**

**4. Approval of Agenda**

Mayor Whitten stated that the City Manager has requested to amend the agenda to include a Benchmark Agreement.

**Motion** by Mr. Blocker and seconded by Mr. Hayes to approve to amend the agenda.

ROLL CALL: 5 ayes from Mr. Hayes, Mr. Blocker, Mr. Rencich, Ms. Brown, Mr. Capps with 0 nays. Motion carried.

**5. Presentations and Reports**

**5.1 Small Business Saturday**

Mayor Whitten read a proclamation in support of Small Business in the City of Crestview.

**5.2 Recognition of Past Elected Officials**

Mayor Whitten noted that during the City Government Week the past elected officials of the City of Crestview were recognized for their work as an elected official. Being that some were not able to make it there are some present now to be recognized. With the help of Ms. Brown, Mayor Whitten recognized those Elected Officials.

**6. Consent Agenda**

## **6.1 Approval of funding from the 2021-2022 Voca-Grant**

### **6.2 HVAC Blackwater Golf Club**

Mayor Whitten asked for action by Council.

Mr. Hayes requested that the City Manager give a brief overview of 6.1- Voca-Grant.

**Motion** by Mr. Blocker and seconded by Mr. Hayes to approve to Consent Agenda.

ROLL CALL: 5 ayes from Mr. Hayes, Mr. Blocker, Mr. Rencich, Ms. Brown, Mr. Capps with 0 nays. Motion carried.

## **7. Public Hearings- Ordinances on Second Reading**

### **Ordinance 1831 Parking and Vehicles**

Mr. Bolduc, City Manager asked the City Clerk to read Ordinance 1831 by title.

Ms. Roy, City Clerk stated, "Ordinance 1831 reads by title,

ORDINANCE: 1831

AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA, PROVIDING FOR AMENDMENT OF THE CITY OF CRESTVIEW CODE OF ORDINANCES, SECTION 86-1 ADOPTION OF FLORIDA UNIFORM TRAFFIC CONTROL LAW: SECTION 86-25, DEFINITIONS; SECTION 86-26, MANNER OF PARKING; SECTION 86-27, UNATTENDED MOTOR VEHICLE; SECTION 86-28, STOPPING, STANDING AND PARKING PROHIBITED IN SPECIFIED AREAS; SECTION 86- 31, PARKING PROHIBITED AT ALL TIMES ON CERTAIN DESIGNATED STREETS; SECTION 86-32 OVERTIME PARKING IN PARKING ZONES; SECTION 86-37, REMOVAL AND IMPOUNDING OF ILLEGALLY PARKED, ABANDONED, OR DISABLE MOTOR VEHICLES; SECTION 86-38, REMOVING IMPOUNDING AN IMMOBLIZATION OF MOTOR VEHICLES BEARING OUTSTANDING CITATIONS; SECTION 86-39, STORAGE, COSTS AND REMOVAL OF IMPOUNDED MOTOR VEHICLES; SECTION 86-42, FIRE LANES ON PRIVATE PROPERTY DEVOTED TO PUBLIC USE; SECTION 86-44, SCHEDULE OF CIVIL PENALTIES FOR PARKING VIOLATIONS; SECTION 86- 45, PARKING FINES UNIT, PROCEDURES UPON NONCOMPLIANCE WITH PARKING VIOLATION NOTICE; PROVIDING FOR AUTHORITY; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF ALL ORDINANCES OR PARTS OF ORDINANCES IN CONFLICT HERewith AND PROVIDING FOR AN EFFECTIVE DATE.

This is the Second Reading of Ordinance 1831.



Mr. Bolduc, City Manager stated that Chapter 86 of the City of Crestview Code of Ordinances requires updating to meet the current needs of the city. The current ordinance was adopted in March of 1997. For consistency with other fines and fees, the fines and fees need to be removed from the ordinance and placed in the Comprehensive Fee Schedule.

Mayor Whitten asked for any public comment.

Mr. Siler, 497 South Wilson St, Crestview stated inquired about the areas that will be covered.

Mr. Bolduc, City Manager stated that this Ordinance is enforced throughout the city.

Mayor Whitten asked for action by Council.

**Motion** by Mr. Rencich and seconded by Ms. Brown to adopt Ordinance 1831 on Second Reading and send for signatures.

ROLL CALL: Mr. Rencich, Ms. Brown, Mr. Capps, Mr. Hayes, Mr. Blocker with 5 ayes and 0 nays. Motion carried.

### **7.1 Ordinance 1836 Chickens**

Mr. Bolduc, City Manager asked the City Clerk to read Ordinance 1836 by title.

Ms. Roy, City Clerk stated, "Ordinance 1836 reads by title,

#### **ORDINANCE: 1836**

AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA, PROVIDING FOR COMPLIANCE WITH STATE OF FLORIDA STATUTE; PROVIDING FOR THE AMENDMENT OF CHAPTER 10 – ANIMALS, SECTION 10-9. – BARNYARD ANIMALS; PROVIDING FOR AUTHORITY; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER’S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF ALL ORDINANCES OR PARTS OF ORDINANCES IN CONFLICT HEREWITH; AND PROVIDING FOR AN EFFECTIVE DATE.

This is the Second Reading of Ordinance 1836.”

Mr. Bolduc, City Manager noted that the change was only for the number of chickens.

A brief discussion ensued.

Two citizens of the Steeplechase subdivision stated that issues that come with having chickens in the city limits and how would those issues be handled and is not in favor of the passing of the ordinance.

Ms. Annabelle Brush, 122 South Drive, is in favor of the passing of the ordinance.

Mayor Whitten asked for action by Council.

**Motion** by Mr. Hayes and seconded by Mr. Blocker to adopt Ordinance 1836 on Second Reading and send for signatures.

ROLL CALL: 5 ayes from Mr. Hayes, Mr. Blocker, Mr. Rencich, Ms. Brown, Mr. Capps, 0 nays. Motion carried.

## **8. Ordinances on First Reading**

### **8.1 Ordinance 1848- Ferdon Boulevard South Rezoning**

Mr. Iten, Senior Planner, stated the subject property is currently located within the City of Crestview with a future land use and zoning designation of Commercial (C) and Commercial High-Intensity District (C-2), respectively. The application requests the Commercial Low-Intensity District (C-1) zoning designation for the property and asked the City Clerk to read Ordinance 1848.

Ms. Roy, City Clerk stated, "Ordinance 1848 reads by title,

ORDINANCE: 1848

AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA, PROVIDING FOR THE REZONING OF 11.07 ACRES, MORE OR LESS, OF REAL PROPERTY, LOCATED IN SECTION 32, TOWNSHIP 3 NORTH, RANGE 23 WEST AND SECTION 5, TOWNSHIP 2 NORTH, RANGE 23 WEST, FROM THE COMMERCIAL HIGH-INTENSITY DISTRICT (C-2) ZONING DISTRICT TO THE COMMERCIAL LOWINTENSITY DISTRICT (C-1) ZONING DISTRICT; PROVIDING FOR AUTHORITY; PROVIDING FOR THE UPDATING OF THE CRESTVIEW ZONING MAP; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF CONFLICTING CODES AND ORDINANCES; AND PROVIDING FOR AN EFFECTIVE DATE.

This is the First Reading of Ordinance 1848.

Mr. Iten, Senior Planner stated that the subject property is currently developed for commercial use or is vacant, and a development application has not been submitted. Based on the requested land-use and zoning designations, the property could be developed for commercial or multi-family use. Courtesy notices were mailed to property owners within 300 feet of the subject property on October 11, 2021. The property was posted on October 19, 2021. An advertisement ran in the Crestview News Bulletin on October 20, 2021.

Mayor Whitten asked for action by Council.

**Motion** by Mr. Rencich and seconded by Mr. Hayes to adopt Ordinance 1848 on First Reading and move to Second Reading. ROLL CALL: 5 ayes from Mr. Rencich, Mr. Hayes, Mr. Blocker, Mr. Capps, Ms. Brown with 0 nays. Motion carried.

## **9. Resolutions**

## **10. Action Items**

### **10.1 Appointment of TDC Board Member**

Mr. Bolduc, City Manager stated that Ms. Adams, Director of the Okaloosa County Tourist Development Board is requesting a representative, an elected official, to be appointed.

Mr. Capps stated that he has attended the TDC meetings and would like to throw his hat in the ring to be appointed.

A brief discussion ensued.

Mayor Whitten asked for action by Council.

**Motion** by Mr. Hayes and seconded by Mr. Blocker to appoint Councilmember Doug Capps to serve as a member of the Okaloosa County TDC.  
ROLL CALL: 5 ayes from Mr. Hayes, Mr. Blocker, Mr. Capps, Mr. Rencich, Ms. Brown with 0 nays. Motion carried.

## **11. City Clerk Report**

### **11.1 Veterans Parade Update**

Ms. Roy, City Clerk gave Council an update on the status of the upcoming Veteran's parade. She also informed Council that Saturday is the annual Christmas Market on Main Street and that the next Council meeting is scheduled for December 13, 2021.

## **12. City Manager Report**

### **12.1 City Manager Updates**

Mr. Bolduc, City Manager gave Council updates on the following projects:

#### **1. Announcement of Michael Criddle as Public Services Director.**

Mr. Bolduc noted that this was a selection made from a nationwide search.

#### **2. Budget Booklets**

The City Manger noted that the booklets were provided to Council and that he or the Finance Director could answer any questions.

### **3. Blackwater Golf Club**

Mr. Bolduc, City Manager gave a brief update on the status of the golf course.

### **4. Mainstreet parking lot and streetscape design**

Mr. Bolduc, City Manager gave a brief update on the progress of this project.

### **5. Crestview Commons**

Mr. Bolduc gave a brief update on the construction of Crestview Commons.

### **6. Wilson Street Splashpad & Mural**

Mr. Bolduc noted that they are still waiting for parts for the splashpad.

### **7. Animal Control Contract**

He noted that there was an upcoming Town Hall meeting for the Public to attend and to speak with PAWS.

### **8. Foxwood Water & Wastewater Improvements**

He noted that they are on schedule with those improvements.

### **9. Skate Park lighting project**

Mr. Bolduc noted that this project is completed.

### **10. McCarthur Code Enforcement Update**

The property did sell and all occupants have been evicted and the new owners are trying to bring the property back up to code.

### **11. Allen Park pavilion update**

He noted that the pavilion is going up.

A brief discussion ensued regarding the updates given.

## **12.2 Contract- Benchmark Agreement (Amended Item)**

Mr. Bolduc, City Manager explained to Council the need for the agreement and asked for Council approval.

**Motion** by Mr. Rencich and seconded by Mr. Capps to approve the Benchmark Agreement presented by the City Manager. ROLL CALL: 5 ayes from Mr. Rencich, Mr. Capps, Mr. Hayes, Mr. Blocker, Ms. Brown with 0 nays. Motion carried.

### **13. Comments from the Mayor and Council**

Mr. Capps thanked all for the community involvement in attending Council meetings.

Mr. Blocker stated that back in March, he requested financial information to provided and that he has not received that information.

Mr. Bolduc, City Manager answered that the information has been provided and offered to schedule a meeting to discuss the financial information further.

Mr. Hayes gave updates on community events that he has attended.

Mayor Whitten also gave updates on recent community events and dates for upcoming events.

### **14. Comments from the Audience**

Mr. Siler, 497 South Wilson Street, Crestview inquired about notification of Ordinance 1831.

Mr. Bolduc, City Manager answered the inquiry.

### **15. Adjournment**

This meeting was adjourned by Mayor Whitten at 7:14 p.m.

Minutes approve this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

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Minutes prepared by Natasha Peacock  
On behalf of the City Clerk

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Maryanne Schrader  
City Clerk

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J B Whitten  
Mayor

**City Council Minutes - DRAFT**  
**January 10, 2022**  
**6:00 PM**  
**Council Chambers**

**1. Call to Order**

The Regular Meeting of the Crestview City Council was called to order at 6:00 p.m. by Mayor JB Whitten. Board members present: Mayor Pro-Tem Shannon Hayes, Councilmembers: Andrew Rencich, Doug Capps, Cynthia Brown, and Joe Blocker. Also present: City Manager Tim Bolduc, City Clerk Maryanne Schrader, City Attorney Jon Holloway, and various staff members.

**2. Invocation, Pledge of Allegiance**

2.1. Pastor Jagger Eastman of Crosspoint - South Crestview

The Invocation was led by Pastor Jagger Eastman and the Pledge was led by Mayor Whitten.

**3. Open Policy Making and Legislative Session**

**4. Approve Agenda**

Mayor JB Whitten stated he needed to add an additional presentation under his report.

**Motion** by Cynthia Brown and seconded by Joe Blocker to approve the agenda with the additional item under the Mayor's report.

Roll Call: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays: None. All ayes. Motion carried.

**5. Presentations and Reports**

Mayor Whitten introduced Captain Raiche, Okaloosa County Sheriff's department, who introduced Captain Todd Watkins as his replacement resulting from his retirement. Council welcomed Captain Watkins.

Mayor Whitten also recognized Kadance Fredericksen as the recipient of the Presidential Volunteer Service Award winner. Miss Fredericksen was also a previous awardee of the Mae Raetha Coleman Citizen of the Year award. Council applauded Miss Fredericksen for her community service.

5.1. Community Resource Web Page

Mayor Whitten spoke on difficulties in communication and mentioned the development of a community resource page to be placed on the website that will provide information to assist the community. He hopes to have it running early February.

5.2. MLK Day Proclamation and details for the MLK March scheduled on January 15, 2022

Mayor Whitten invited the community to participate in the Dr. Martin Luther King Jr. march scheduled for January 15, 2022, with the march beginning at 9 a.m. at the south entrance to Main Street and ending at the Veterans' Memorial followed by a ceremony led by Reverend Benjamin Randolph of Beulah No. 1 Missionary Baptist Church.

**6. Consent Agenda**

**Motion** by Shannon Hayes and seconded by Joe Blocker to approve the Consent Agenda.

Roll Call: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays: None. All ayes. Motion carried.

6.1. Engineering and Consulting Services for Wingard Property Infiltration System

6.2. 12/13/2021 City Council Minutes - Draft

6.3. 8/23/2021 City Council Minutes - Draft

6.4. 9/7/2021 City Council Special Meeting Minutes - Draft

6.5. 9/15/2021 City Council Public Hearing Minutes - Draft

6.6. 09/27/2021 City Council Public Hearing Minutes - Draft

6.7. 9/27/2021 City Council Minutes - Draft

## **7. Public Hearings / Ordinances on Second Reading**

7.1. Ordinance 1849 Property Rights Element of the Comprehensive Plan

Planner N. Schwendt requested a motion to adopt Ordinance 1849 on 2nd reading and asked City Clerk Maryanne Schrader to read Ordinance 1849 by title.

City Clerk Maryanne Schrader read Ordinance 1849 by title:

An Ordinance Providing for a Comprehensive Plan Amendment; Providing for Authority; Providing for Filing with the Clerk of Circuit Court Of Okaloosa County, the Chief Administrative Officer of Okaloosa County and the Florida Department of State; Providing for Severability; Providing for Scrivener's Errors; Providing for Liberal Interpretation; Providing for Repeal of Conflicting Codes and Ordinances; and Providing for an Effective Date.

**Motion** by Andrew Rencich and seconded by Douglas Capps to adopt Ordinance 1849 on 2nd reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

## **8. Ordinances on First Reading**

8.1. Ordinance 1837 - Old Bethel Road Annexation

Planner N. Schwendt reviewed the process regarding the applicant's request and mentioned the Silver Oaks Homeowners Association representative called and mentioned they will post the information on their website.



Mayor JB Whitten received no further comment from Council or the public.

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1837 - Old Bethel Road Annexation.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance annexing to the City of Crestview, Florida, ± 48.48 acres of contiguous lands located in section 31, township 4 north, range 23 west, and being described as set forth herein; providing for authority; providing for land description; providing for boundary; providing for land use and zoning designation; providing for amendment to the base, land use and zoning maps; providing for a comprehensive plan amendment; providing for filing with the clerk of circuit court of Okaloosa county, the chief administrative officer of Okaloosa County and the Florida Department of State; providing for severability; providing for scrivener's errors; providing for liberal interpretation; providing for repeal of conflicting codes and ordinances; and providing for an effective date.

**Motion** by Shannon Hayes and seconded by Joe Blocker approve Ordinance 1837 on 1st reading and move to 2<sup>nd</sup> Reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

## 8.2. Ordinance 1838 - Old Bethel Road Comprehensive Plan Amendment

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1838 - Old Bethel Road Comprehensive Plan Amendment.

Mayor JB Whitten asked for comment and received none from Council or the public.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance of The City Of Crestview, Florida, Amending Its Adopted Comprehensive Plan; Providing For Authority; Providing For Findings Of Fact; Providing For Purpose; Providing For Changing The Future Land Use Designation From Okaloosa County Low Density Residential To Residential On Approximately 48.48 Acres, More Or Less, In Section 31, Township 4 North, Range 23 West; Providing For Future Land Use Map Amendment; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date

**Motion** was made by Joe Blocker and seconded by Cynthia Brown to approve Ordinance 1838 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

## 8.3. Ordinance 1839 - Old Bethel Road Rezoning

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1839 - Old Bethel Road Rezoning for 1st Reading.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Of The City Of Crestview, Florida, Providing For The Rezoning Of 48.48 Acres, More Or Less, Of Real Property, Located In Section 31, Township 4 North, Range 23 West, From

The Okaloosa County Residential-1 Zoning District To The Single And Multi-Family Density Dwelling District (R-3) Zoning District; Providing For Authority; Providing For The Updating Of The Crestview Zoning Map; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

Mayor asked for comment and hearing none called for action.

**Motion** was made by Councilmember Douglas Capps and seconded by Councilmember Shannon Hayes to approve Ordinance 1839 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

#### 8.4. Ordinance 1840 - Lindley Road Annexation

Planner N. Schwendt reviewed the three ordinances for the zoning change to R-1 stating he has had numerous conversations with the public. Residents were concerned about density, traffic, and schools. Staff has not received any plans for development yet. He stated the Planning Development Board recommended approval.

Mayor asked for comment from the Council. Councilmember C. Brown mentioned the residents' concerns, as well as the density of development in the area stating there was no other road out.

Planner N. Schwendt explained when a development plan is submitted, Council will be able to review it. He added the roads are county or state roads mentioning a traffic study will have to be submitted and mitigation will be required.

Mayor JB Whitten called Elizabeth Daughtery of 144 Old South Drive forward. Ms. Daughtery spoke regarding her concerns on development that could cause the loss of animal loss, density, noise, and increased property taxes.

Gary Magnusson of 213 Kirkwood Run came forward stating his property is within 300 feet of the property proposed. He also voiced concern on the density, property values, noise, and congestion. He asked the Council to consider the issues presented.

Johnathan Wheeler, 112 South Drive, voiced concern on density, property taxes, safety, noise, traffic problems and asked for consideration on building less homes in the area.

The developer came forward stating he is looking at the traffic issues and the egress/ingress issues adding the plan is to build estate homes.

Patricia Martin came forward also voicing concern on the development, outlet issues, and diminished property values.

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1840 - Lindley Road Annexation for 1st Reading.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Annexing To The City Of Crestview, Florida, ± 172.45 Acres Of Contiguous Lands Located In Section 2, Township 3 North, Range 24 West, And Being Described As Set Forth Herein; Providing For Authority; Providing For Land Description; Providing For Boundary;

Providing For Land Use And Zoning Designation; Providing For Amendment To The Base, Land Use And Zoning Maps; Providing For A Comprehensive Plan Amendment; Providing For Filing With The Clerk Of Circuit Court Of Okaloosa County, The Chief Administrative Officer Of Okaloosa County and the Florida Department of State; Providing for Severability; Providing for Scrivener's Errors; Providing for Liberal Interpretation; Providing for Repeal of Conflicting Codes and Ordinances; and Providing for an Effective Date.

**Motion** by Councilmember Andrew Rencich and seconded by Councilmember Shannon Hayes to approve Ordinance 1840 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

#### 8.5. Ordinance 1841 - Lindley Road Comprehensive Plan Amendment

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1841 -Lindley Road Comprehensive Plan Amendment on 1st Reading.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Of The City Of Crestview, Florida, Amending Its Adopted Comprehensive Plan; Providing For Authority; Providing For Findings Of Fact; Providing For Purpose; Providing For Changing The Future Land Use Designation From Okaloosa County Agriculture To Residential On Approximately 172.45 Acres, More Or Less, In Section 2, Township 3 North, Range 24 West; Providing For Future Land Use Map Amendment; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

Mayor asked for comment and receiving none called for action.

**Motion** was made by Councilmember Shannon Hayes and seconded by Councilmember Cynthia Brown to approve Ordinance 1841 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

#### 8.6. Ordinance 1842 - Lindley Road Rezoning

Planner N. Schwendt presented Ordinance information to the City Council on Ordinance 1842 - Lindley Road Rezoning.

Mayor asked for comments from the Council and public.

City Manager T. Bolduc displayed and clarified the property location.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Of The City Of Crestview, Florida, Providing For The Rezoning Of 172.45 Acres, More Or Less, Of Real Property, Located In Section 2, Township 3 North, Range 24 West, From The Okaloosa County Agriculture Zoning District To The Single-Family Low-Density Dwelling District (R-1) Zoning District; Providing For Authority; Providing For The Updating Of The Crestview Zoning Map; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

**Motion** made by Councilmember Cynthia Brown and seconded by Councilmember Joe Blocker to approve Ordinance 1842 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

8.7. Ordinance 1843 - Raspberry Road Annexation

Planner N. Schwendt stated staff has not received development plans nor comments from the public. He presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1843 - Raspberry Road Annexation on 1st Reading.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Annexing To The City Of Crestview, Florida, ± 30.12 Acres Of Contiguous Lands Located In Section 30, Township 3 North, Range 23 West, And Being Described As Set Forth Herein; Providing For Authority; Providing For Land Description; Providing For Boundary; Providing For Land Use And Zoning Designation; Providing For Amendment To The Base, Land Use And Zoning Maps; Providing For A Comprehensive Plan Amendment; Providing For Filing With The Clerk Of Circuit Court Of Okaloosa County, The Chief Administrative Officer Of Okaloosa County And The Florida Department Of State; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

Mayor JB Whitten called for comment from the Council and public and hearing none called for action.

**Motion** made by Councilmember Andrew Rencich and seconded by Councilmember Shannon Hayes to approve Ordinance 1843 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

8.8. Ordinance 1844 - Raspberry Road Comprehensive Plan Amendment

Planner N. Schwendt presented the Ordinance information to the City Council for Ordinance 1844 - Raspberry Road Comprehensive Plan Amendment on 1st Reading.

Mayor JB Whitten asked for comments.

In response to Councilmember J. Blocker regarding whether the developer was a resident, city Manager T. Bolduc replied the developer is a resident of the County.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Of The City Of Crestview, Florida, Amending Its Adopted Comprehensive Plan; Providing For Authority; Providing For Findings Of Fact; Providing For Purpose; Providing For Changing The Future Land Use Designation From Okaloosa County Mixed Use To Mixed Use On Approximately 30.12 Acres, More Or Less, In Section 30, Township 3 North, Range 23 West; Providing For Future Land Use Map Amendment; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

**Motion** made by Councilmember Cynthia Brown and seconded by Councilmember Shannon Hayes to approve Ordinance 1844 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

8.9. Ordinance 1845 - Raspberry Road Rezoning

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1845 - Raspberry Road Rezoning on 1st Reading.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Of The City Of Crestview, Florida, Providing For The Rezoning Of 30.12 Acres, More Or Less, Of Real Property, Located In Section 30, Township 3 North, Range 23 West, From The Okaloosa County Mixed Use Zoning District To The Mixed Use Zoning District; Providing For Authority; Providing For The Updating Of The Crestview Zoning Map; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

Mayor JB Whitten asked for comments from the Council and public and hearing none called for action.

**Motion** by Councilmember Douglas Capps and seconded by Councilmember Joe Blocker to approve Ordinance 1849 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

8.10. Ordinance 1850 - Amendment to LDC Section 8.04.00 - Street Access and Driveway Design Requirements

Planner N. Schwendt mentioned the corrections to the Land Development Code needed to be updated explaining the requirements were unnecessary and needed to be removed, as other sections of the Code provide for spacing and land buffer requirements. He added the current section may provide undue hardship on local developers particularly the downtown area.

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1850 - Amendment to Land Development Code, Section 8.04.00 - Street Access and Driveway Design Requirements.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance of The City of Crestview, Florida, Providing for The Amendment of Section 8.04.00 – Street Access and Driveway Design Requirements of The Land Development Code; Providing for Authority; Providing for Severability; Providing for Scrivener's Errors; Providing for Liberal Interpretation; Providing for Repeal of Conflicting Codes and Ordinances; And Providing for An Effective Date.

Mayor Whitten asked for comment from Council and the public and hearing none called for action.

**Motion** by Councilmember Andrew Rencich and seconded by Councilmember Douglas Capps to approve Ordinance 1850 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5;

Nays 0. All ayes. Motion carried.

8.11. Ordinance 1851 - Amendment to LDC Section 6.01.02 – Residential Design Standards

Planner N. Schwendt went over the direction of front doors relating to facing the front yards and addressed visibility issues. He explained safety considerations were addressed with the police department. He presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1851 - Amendment to the Land Development Code, Section 6.01.02 - Residential Design Standards.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance of The City of Crestview, Florida, Providing for The Amendment of Section 6.01.02 – Residential Design Standards of The Land Development Code; Providing for Authority; Providing for Severability; Providing for Scrivener’s Errors; Providing for Liberal Interpretation; Providing for Repeal of Conflicting Codes and Ordinances; And Providing for An Effective Date.

Mayor JB Whitten called for comment from Council and public and hearing none called for action.

**Motion** by Councilmember Shannon Hayes and seconded by Councilmember Joe Blocker to approve Ordinance 1851 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

8.12. Ordinance 1852 - Patriot Lane Annexation

Planner N. Schwendt presented the Ordinance information to the City Council for Ordinance 1852 - Patriot Lane Annexation explaining the property request is to change to mixed-use which is consistent with property they already own. He added they have not received plans nor public comment on this project.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Annexing To The City Of Crestview, Florida, ± 1.37 Acres Of Contiguous Lands Located In Section 21, Township 3 North, Range 23 West, And Being Described As Set Forth Herein; Providing For Authority; Providing For Land Description; Providing For Boundary; Providing For Land Use And Zoning Designation; Providing For Amendment To The Base, Land Use And Zoning Maps; Providing For A Comprehensive Plan Amendment; Providing For Filing With The Clerk Of Circuit Court Of Okaloosa County, The Chief Administrative Officer Of Okaloosa County And The Florida Department Of State; Providing For Severability; Providing For Scrivener’s Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

Mayor asked for comment from Council and the public and on hearing none called for the vote.

**Motion** was made by Councilmember Cynthia Brown and seconded by Councilmember Shannon Hayes to approve Ordinance 1852 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

8.13. Ordinance 1853 - Patriot Lane Comprehensive Plan Amendment

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City

Clerk to read Ordinance 1853 - Patriot Lane Comprehensive Plan Amendment.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance of the City Of Crestview, Florida, Amending Its Adopted Comprehensive Plan; Providing For Authority; Providing For Findings Of Fact; Providing For Purpose; Providing For Changing The Future Land Use Designation From Okaloosa County Low Density Residential To Mixed Use On Approximately 1.37 Acres, More Or Less, In Section 21, Township 3 North, Range 23 West; Providing For Future Land Use Map Amendment; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

Mayor JB Whitten asked for Council and public comment and hearing none called for the vote.

**Motion** was made by Councilmember Douglas Capps and seconded by Councilmember Joe Blocker to approved Ordinance 1853 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

#### 8.14. Ordinance 1854 - Patriot Lane Rezoning

Planner N. Schwendt presented the Ordinance information to the City Council and asked the City Clerk to read Ordinance 1854 - Patriot Lane Rezoning.

City Clerk Maryanne Schrader read the Ordinance by Title:

An Ordinance Of The City Of Crestview, Florida, Providing For The Rezoning Of 1.37 Acres, More Or Less, Of Real Property, Located In Section 21, Township 3 North, Range 23 West, From The Okaloosa County Residential-1 Zoning District To The Mixed Use Zoning District; Providing For Authority; Providing For The Updating Of The Crestview Zoning Map; Providing For Severability; Providing For Scrivener's Errors; Providing For Liberal Interpretation; Providing For Repeal Of Conflicting Codes And Ordinances; And Providing For An Effective Date.

**Motion** was made by Councilmember Andrew Rencich and seconded by Councilmember Shannon Hayes to approve Ordinance 1854 on 1st reading and move to second reading for final adoption. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

## **9. Resolutions**

#### 9.1. Resolution 2022-3 - Woodruff Avenue Vacation

Planner N. Schwendt went over the application process stating the row is no longer used except by the property owner. He presented the Resolution information to the City Council and asked the City Clerk to read Resolution 2022-3 - Woodruff Avenue Vacation.

City Clerk Maryanne Schrader read the Resolution by title:

A Resolution of The City of Crestview, Florida, Vacating and Abandoning That Portion of Woodruff Avenue East Right of Way Lying Between Blocks 5 And 10 Of the Town of Crestview Plat, More Specifically Described Herein; Providing for Recording of This Resolution with The Clerk of The Circuit Court of Okaloosa County; And Providing for An Effective Date.



**Motion** by Councilmember Joe Blocker and seconded by Cynthia Brown to adopt Resolution 2022 - 3, Woodruff Avenue Vacation. ROLL CALL: Joe Blocker, Cynthia Brown, Shannon Hayes, Andrew Rencich, Douglas Capps. Ayes: 5; Nays 0. All ayes. Motion carried.

**10. Action Items**

**11. City Clerk Report**

**12. City Manager Report**

12.1. Financial Update - City Manager

City Manager Tim Bolduc presented the financial update to the City Council and asked for questions.

**13. Comments from the Mayor and Council**

Councilmember A. Rencich mentioned this is a good way to start the new year with all the annexations.

Councilmember C. Brown applauded staff for the balance of ordinances and commitment to keeping crime down.

Councilmember J. Blocker recommended having an advisory committee to come up with murals in the high traffic areas.

Councilmember S. Hayes thanked the mayor, city manager and Council for making Crestview a better place for the citizens. He thanked citizens for their support, as well.

Mayor JB Whitten mentioned that he has 62 entries on the community calendar he is working on.

**14. Comments from the Audience**

**15. Adjournment**

This meeting was adjourned by Mayor Whitten at 7:23 p.m.

Minutes approve this \_\_ day of \_\_, 2022.

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Maryanne Schrader  
City Clerk

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JB Whitten  
Mayor



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Action Item

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Kyle Lusk  
DATE: 1/20/2022  
SUBJECT: Approval of change order #1 with Sawcross for the WWTP Solids Handling and Dewatering project

---

**BACKGROUND:**

As a result of continuous and unprecedented growth, the City of Crestview Waste Water Sewer Treatment Plant located on Arena Rd needs upgrades to handle the current biosolids loading rates. Solids removal is part of the treatment process. The current original belt press filled 20 - thirty yard dumpsters for the month of May 2021. This proposed upgrade will greatly improve the dewatering process and reduce the frequency of full dumpsters being removed after dewatering.

The proposed upgrades includes a two new aerobic digesters which will help meet compliance and permit limits and a new belt press with a dewatering building, improvements to the existing control panels and electrical controls, and improvements to the BFP feed system.

**DISCUSSION:**

The Dewatering and Biosolids Handling project was bid in May 2021. Sawcross was the lowest responsive bidder and was approved at the June 28th 2021 City Council meeting as the winning bid.

The notice of award was given to Sawcross on January 10th 2022. The change order was for the material price increases that occurred in the eight months between the bid being submitted and the notice of award. The total cost of change order #1 is \$448,605.27. When added to the original bid amount of \$4,473,000 it brings the total project cost to \$4,921,605.27.

**GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Infrastructure-* Satisfy current and future infrastructure needs

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Opportunity-* Promote an environment that encourages economic and educational opportunity

**FINANCIAL IMPACT**

The cost of the project was \$4,473,000 when the bids came in.

Change Order #1 is for the material price increases since May 2021 for \$448,605.27. The current cost of the project is \$4,921,605.27

The cost of the project will be paid through Water and Sewer Revenue Bond Series 2021.

**RECOMMENDED ACTION**

Staff respectfully requests approval of the change order so the project can stay on schedule.

**Attachments**

1. CrestviewWWTP Solids Handling Project\_Recommendation of Award
2. CrestviewWWTP-Dewatering\_Notice of Award - signed



25 W. Cedar Street  
Suite 350  
Pensacola, FL 32502-5911  
O +1 (850) 438 2740  
F +1 850 939 0035  
www.jacobs.com

May 26, 2021

Mr. Wayne Steele  
Public Services Director  
City of Crestview, FL  
715 N Ferdon Blvd  
Crestview, FL 32536

Subject: ITB# 2021-05-11 – Crestview WWTP Solids Handling Improvements – Recommendation  
of Award

Dear Mr. Steele:

We have completed our review of the bids received and publicly read on May 18, 2021, for the above-referenced project. Bids were received from two general contractors. The names of the submitting contractors and their corresponding bid amounts are summarized below:

| Firm               | Base Bid       |
|--------------------|----------------|
| 1 Sawcross Inc.    | \$4,473,000.00 |
| 2 J&P Construction | \$5,451,000.00 |

The apparent low, responsive, responsible bidder is Sawcross Inc. The Sawcross bid documents appear to be properly completed and without any apparent errors. We have contacted the references listed in the bid submittal and the respective references did not note any negative issues.

Pending final review by the City, Jacobs recommends award of the contract to Sawcross Inc. for the base bid amount of \$4,473,000.00. Please give me a call if you have any questions or need additional information.

Sincerely,

Jacobs

Scott L. Jernigan, P.E.  
Project Manager



**CITY OF CRESTVIEW**  
**Department of Public Services**  
715 Ferdon Boulevard North  
Crestview, Florida 32536

Director  
Michael J. Criddle  
**E-Mail:** [criddlem@cityofcrestview.org](mailto:criddlem@cityofcrestview.org)

Telephone No. (850) 682-6132  
Fax No. (850) 682-7359

January 10, 2022

Mr. Justin Hanson  
Sawcross, Inc.  
10970 New Berlin Rd  
Jacksonville, FL 32226

Re: NOTICE OF AWARD  
ITB# 2021-05-11 Crestview WWTP Solids Handling Improvements  
City of Crestview, FL

Dear Mr. Hanson:

Bids were received on Tuesday, May 18, 2021, in the City of Crestview, and publicly opened and read. Your firm has been determined to be the low and responsive bidder for the subject project.

The City of Crestview has authorized the award of the Crestview WWTP Solids Handling Improvements Project to Sawcross, Inc. in the amount of \$4,473,000 (Base Bid). Accordingly, please accept this letter as your Notice of Award.

Additionally, Change Order 1 will be executed following execution of the contract in the amount of \$448,605.27 for the material and labor cost increases since the bid opening date. This will produce a revised contract amount of \$4,921,605.27.

The City of Crestview is now ready to structure and execute a "Contractual Agreement" with your firm contingent upon the receipt of required insurance certificates and performance and payment bonds. We are supplying you with four (4) sets of the contract documents into which we have inserted copies of your bid proposal and a copy of this Notice of Award. Within ten (10) days of your receipt of the contract documents, will you please:

1. Obtain the required bonds and insurance certificates
2. Provide insurance certificates
3. Sign all four sets in the required spaces
4. Return all four sets to us for signature after review by our attorney

Once these items have been completed and the contract has been executed and dated by The City of Crestview, we will schedule the pre-construction conference. It is our intent to issue the Notice to Proceed at that time.

Sincerely,

A handwritten signature in black ink, appearing to read "Mr. Criddle", written in a cursive style.

Michael Criddle  
Public Services Director

Cc: Scott Jernigan, PE, Jacobs Engineering



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Action Item

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Kyle Lusk  
DATE: 1/19/2022  
SUBJECT: Contract Award, Street Resurfacing Bid

---

## **BACKGROUND:**

All roadways have a design life and must be repaved intermittently to remain operational. The Street Overlay program is a yearly operation expense for the Streets Department to keep aging roads driveable.

## **DISCUSSION:**

The 2021 Asphalt Overlay list has 10 roadways for a total of 1,445 tons of asphalt. This year's roadways are the Northview Dr / Villacrest Dr connector streets and the back loop of Beaver Creek. The lowest responsive bidder was C.W. Roberts Contracting, Inc. with a bid of \$209,525.00. Once the bid is approved, a notice of award can be sent to the contractor.

## **GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Infrastructure-* Satisfy current and future infrastructure needs

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Safety-* Ensure the continuous safety of citizens and visitors

*Mobility-* Provide safe, efficient and accessible means for mobility

*Opportunity-* Promote an environment that encourages economic and educational opportunity

## **FINANCIAL IMPACT**

This project will cost \$209,525.00 and was a budget expense within the Street Department's annual street resurfacing budget.

## **RECOMMENDED ACTION**

Staff requests a motion to approve the Asphalt Overlay contract to C.W. Roberts Contracting, Inc. in the amount of \$209,525.00.

**Attachments**

1.     Winning Bid
2.     Asphalt Overlay List and map 2021





Director  
Brona D. Steele  
E-Mail: [steele@cityofcrestview.org](mailto:steele@cityofcrestview.org)  
Telephone No. (850) 682-6132

**CITY OF CRESTVIEW**  
**Department of Public Services**  
715 Ferdon Boulevard North  
Crestview, Florida 32536

Assistant Director  
Chuck Powell  
E-Mail: [chuckpowell@cityofcrestview.org](mailto:chuckpowell@cityofcrestview.org)  
Fax No. (850) 682-7359

## Street Resurfacing List 2020-2021

| LOCATION                      | RANKING | TONS |
|-------------------------------|---------|------|
| 1. Juniper Dr. 1,150' x 24'   | A       | 225  |
| 2. Krest Dr. 900' x 24'       | A       | 175  |
| 3. Moss Dr. 800' x 24'        | A       | 155  |
| 4. Naughton Dr. 750' x 24'    | A       | 145  |
| 5. Cloverview Dr. 700' x 24'  | A       | 135  |
| 6. Pinellas Dr. 550' x 24'    | A       | 110  |
| 7. Quigley Dr. 450' x 24'     | A       | 90   |
| 9. Mill Pond Cv. 1,600' x 22' | A       | 290  |
| 10. Mill Stone Cv. 580' x 22' | A       | 120  |
| <b>1,445 TONS OF ASPHALT</b>  |         |      |



# Countryview Area

## Legend

Untitled Path





# Mill Pond Cv. & Mill Stone Cv.

- Legend**
-  Untitled Path



Google Earth

© 2020 Google



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Action Item

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Crista Shephard, Special Projects Manager  
DATE: 1/20/2022  
SUBJECT: Asphalt Quotes for Cart Path

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**BACKGROUND:**

City Council previously approved staff's requests to serve as the contractor, and deviate from the purchasing manual for improvements at Blackwater Golf Club.

**DISCUSSION:**

At the December 13, 2021 meeting, the City Manager provided an estimated cost of \$311,000.00 for the replacement of the cart paths. City Council instructed the City Manager to obtain two additional quotes and move forward with the cart path construction.

The following companies provided proposals:

- |                             |              |
|-----------------------------|--------------|
| 1. T&H Paving               | \$311,000.00 |
| 2. Green Energy Contracting | \$365,177.00 |
| 3. West Florida Asphalt     | \$384,322.50 |

After obtaining the additional quotes, T&H Paving was given permission to proceed.

**GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Infrastructure-* Satisfy current and future infrastructure needs

*Communication-* To engage, inform and educate public and staff

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Community Character-* Promote desirable growth with a hometown atmosphere

*Safety-* Ensure the continuous safety of citizens and visitors

*Opportunity-* Promote an environment that encourages economic and educational opportunity

*Play-* Expand recreational and entertainment activities within the City

*Community Culture-* Develop a specific identity for Crestview

**FINANCIAL IMPACT**

The immediate funding for this purchase is in fund balance. The expense will be added to the repayment program for Golf Course activities.

**RECOMMENDED ACTION**

Staff requests a motion from City Council to approve the contract with T&H Paving for asphalt paving of the cart paths in the amount of \$311,000.

**Attachments**

1. Blackwater Golf Club Cart Path Bids





850-559-9584

[www.Freeportashalt.com](http://www.Freeportashalt.com)

[BryerJesse@yahoo.com](mailto:BryerJesse@yahoo.com)

Project: Golf course project  
Crestview,Fl

| Description                                                                                                                | Cost              |
|----------------------------------------------------------------------------------------------------------------------------|-------------------|
| Estimating on 22,000 linear feet by 8 foot wide.<br>Equaling 176,000 square feet total.                                    |                   |
| Prepping paths by cutting out grass and dirt 3 1/2 inches.<br>Cleaning and prepping parts that have previously been paved. |                   |
| Lay 2 inches of base over all area that's dirt.                                                                            |                   |
| Vibratory roll and compact                                                                                                 |                   |
| Laying 2 inches of hot mix (9mm) asphalt through asphalt paver. 1 inch of asphalt over areas already paved.                |                   |
| Vibratory roll and compact asphalt.                                                                                        |                   |
| <b>Total</b>                                                                                                               | <b>\$ 311,000</b> |

A deposit of 50% is required upon start of work. The balance upon completion.

Thank you for the opportunity!

Jesse Bryer  
850-559-9584



## **-Blackwater Golf Course Cart Paving-**

### **Proposal Information:**

Michael Clinton  
Department of Public Services  
City of Crestview

### **Project Location:**

Blackwater Golf Course  
Crestview, FL

Green Energy Contracting, LLC. offers to furnish and install all labor, material, and equipment required for the performance of the following described work in connection with the above referenced project at the prices indicated:

### **Base Bid: \$365,177.00**

Scope of Work: Labor, equipment, and material to overlay existing asphalt cart paths and subgrade, base, and pave remaining dirt cart paths.

#### **Overlay Existing Cart Path**

- 1" overlay of existing asphalt (9.5) cart path

#### **Unpaved Cart Path Areas**

- Subgrade preparation
- 2-4" of crushed concrete base course (unpaved areas)
- 1-1/2" asphalt (9.5) course to be installed on unpaved areas

### **Notes:**

1. This proposal is valid for 30 calendar days from date submitted, but may be accepted at any later date at the sole option of Green Energy Contracting, LLC.
2. Pricing based on proposal sent to GEC on 12/14/21 by Michael Clinton.
3. Estimate is based on 22,000 LF of cart path
4. Pricing subject to acceptable terms & conditions.

### **Job Specific Exclusions:**

1. No stabilization
2. No silt fence or SWPPP BMPS included
3. Any earthwork spoils will be stockpiled onsite for the City of Crestview
4. Any limbs will be trimmed along golf course for access by others
5. No subgrade, base, or asphalt testing and/or cores

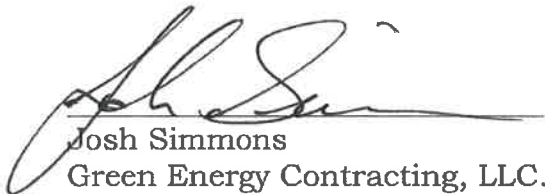
### **Standard Exclusions:**

1. Meter Fees / Tap Fees / Impact Fees / Usage Fees / Relocations Fees.
2. All permits & fees to be by others.
3. FDOT permit, QC plan, and any associated testing are to be by others.

**LET'S GO TO WORK.**



4. FDOT Bond not included.
5. Contractor laydown yard / parking / trailer services.
6. Temporary Utilities.
7. Removal or relocation of existing utilities such as phone, cable, power, gas, unless specifically stated that we have included.
8. Sleeves for other trades.
9. Utilities tie-ins within 5' of the building.
10. Fireline permit and inspections.
11. Utility connections on face of buildings.
12. Removal of demolition and / or spoils generated by other trades.
13. No dewatering for other trades.
14. Capillary barrier.
15. Backfill of building pads after other sub-contractors have installed items.
16. Electrical conduits / communication conduits.
17. Electrical services to meters, tamper switches, lift stations, etc.
18. Grading for sidewalks, site amenities
19. Base for sidewalks, site amenities.
20. Curb turnouts associated with sidewalks / ramps.
21. Sidewalks, ramps, walks, driveways, dumpster pads, cart corrals, steps, or other "flat work."
22. Detectable warning mats.
23. Signage on face of buildings.
24. Architectural / Landmark / Store Signage.
25. Retaining walls not included.
26. Handrails not included.
27. Landscaping or final stabilization.
28. Topsoil amendments relating to landscaping and final stabilization.
29. Irrigation lines, services, meters, backflows.
30. Certified As-Builts



Josh Simmons

Green Energy Contracting, LLC.

Cell: 850-603-1205

Email: [josh@gecontracting.net](mailto:josh@gecontracting.net)

Date Submitted: 1/5/2022

**LET'S GO TO WORK.**



# WEST FLORIDA ASPHALT

Baker, FL  
Phone (850) 259-7901  
Email: [Jamesdavidsiteprep@gmail.com](mailto:Jamesdavidsiteprep@gmail.com)  
[pave@westfloridaasphalt.com](mailto:pave@westfloridaasphalt.com)

## PROPOSAL

Date: 1/7/2022

Project: CART PATH PAVING

Name: City of Crestview  
Address: 715 Ferdon Blvd. N  
Crestview FL 32536  
Phone: 850-682-6132  
Attn: Brona Steele

### ASPHALT PAVING

| Description of Items                                                          | UNIT | QTY   | COST         | TOTAL               |
|-------------------------------------------------------------------------------|------|-------|--------------|---------------------|
| <b>OVERLAY EXISTING ASPHALT CART PATHS / CONSTRUCT NEW ASPHALT CART PATHS</b> |      |       |              |                     |
| Mobilization                                                                  | LS   | 1     | \$3,000.00   | \$3,000.00          |
| Grading                                                                       | SY   | 19555 | \$1.50       | \$29,332.50         |
| Asphalt Overlay (Existing Paths) / 6" GAB/ 2" Asphalt (New Paths)             | SY   | 19555 | \$18.00      | \$351,990.00        |
|                                                                               |      |       | <b>TOTAL</b> | <b>\$384,322.50</b> |

This estimate is for ONLY items listed above.

West Florida Asphalt, LLC will provide all materials , labor and equipment to complete the above described work in a professional and workman like manner per plans and specifications identified below. Any changes in the plans or specifications will result in a change order to be signed before any additional work or changes are made.

Completion Date: The project will be completed in a timely manner. Delays may occur due to weather conditions, availability of materials, or any unforeseen conditions that may affect the work.

\_\_\_\_\_  
Contractor/ Contractor Agent

\_\_\_\_\_  
Date

\_\_\_\_\_  
West Florida Asphalt, LLC.

\_\_\_\_\_  
Date



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: 2nd Reading

---

TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Dawn Barnes  
DATE: 1/18/2022  
SUBJECT: Ordinance 1840 - Lindley Road Annexation

---

**BACKGROUND:**

On September 30, 2021 staff received an application to annex and to amend the comprehensive plan and zoning designations for property located on Lindley Road.

The subject property is currently located within unincorporated Okaloosa County with a future land use and zoning designation of Agriculture.

The Planning and Development Board recommended approval of the request on January 3, 2022, and the first reading was on January 10, 2022.

**DISCUSSION:**

The property description is as follows:

Property Owner: Eagle View Investments LLC  
9729 Hammocks Blvd E107  
Miami, FL 33196  
02-3N-24-0000-0003-0000  
02-3N-24-0000-0003-0010  
Parcel ID: 02-3N-24-0000-0003-001C  
02-3N-24-0000-0003-001E  
02-3N-24-0000-0004-0010  
Site Size: 172.45 acres  
Current FLU: Okaloosa County Agriculture  
Current Zoning: Okaloosa County Agriculture  
Current Land Use: Vacant

The following table provides the surrounding land use designations, zoning districts, and existing uses.

| Direction | FLU                                  | Zoning                                                               | Existing Use         |
|-----------|--------------------------------------|----------------------------------------------------------------------|----------------------|
| North     | Conservation (CON) & Residential (R) | Conservation (E) & Single-Family Low-Density Dwelling District (R-1) | Vacant & Residential |
| East      | Residential (R)                      | Single-Family Low-Density Dwelling District (R-1)                    | Vacant & Residential |

|       |                                                 |                                                 |                      |
|-------|-------------------------------------------------|-------------------------------------------------|----------------------|
| South | Okaloosa County Agriculture & Rural Residential | Okaloosa County Agriculture & Residential Rural | Vacant & Residential |
| West  | Okaloosa County Conservation                    | Okaloosa County Institutional                   | Vacant               |

The subject property is currently vacant, and a development application has not been submitted. Based on the requested land-use and zoning designations, the property could be developed for residential use.

Staff has reviewed the application based on the criteria detailed in Florida statute 171.043 for annexations and finds the following:

- The property is contiguous to the city limits;
- The property is comprised of five (5) lots in unincorporated Okaloosa County, and is therefore considered compact;
- The annexation of the property would not create an enclave
- The subject property is not included in the boundary of another municipality; and,
- The subject property meets the definition of urban purposes.

Courtesy notices were mailed to property owners within 300 feet of the subject property on October 11, 2021. A letter was sent via certified mail to the Okaloosa Board of County Commissioners on October 18, 2021. The property was posted on October 19, 2021 and updated on December 14, 2021. An advertisement ran in the Crestview News Bulletin on December 22, 2021.

### **GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows.

**Foundational** – these are the four areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability* – Achieve long term financial sustainability.

*Organizational Capacity, Effectiveness & Efficiency* – To efficiently & effectively provide the highest quality of public services.

**Quality of Life** – these six areas focus on the overall experience when provided by the city.

*Community Character* – Promote desirable growth with a hometown atmosphere.

*Opportunity* – Promote an environment that encourages economic and educational opportunity.

*Community Culture* – Develop a specific identity for Crestview.

### **FINANCIAL IMPACT**

The fees for annexation have been waived for this application as it was received during the moratorium on annexation fees.

The cost of advertising is approximately \$700.00.

The successful annexation of this property will have positive future impacts, including ad valorem revenue based on future taxable assessed value, development and building permit fees, and utility usage fees.

### **RECOMMENDED ACTION**

Request motion to adopt Ordinance 1840 on 2nd reading.

## **Attachments**

1. Exhibit Packet

## **ORDINANCE: 1840**

**AN ORDINANCE ANNEXING TO THE CITY OF CRESTVIEW, FLORIDA, ± 172.45 ACRES OF CONTIGUOUS LANDS LOCATED IN SECTION 2, TOWNSHIP 3 NORTH, RANGE 24 WEST, AND BEING DESCRIBED AS SET FORTH HEREIN; PROVIDING FOR AUTHORITY; PROVIDING FOR LAND DESCRIPTION; PROVIDING FOR BOUNDARY; PROVIDING FOR LAND USE AND ZONING DESIGNATION; PROVIDING FOR AMENDMENT TO THE BASE, LAND USE AND ZONING MAPS; PROVIDING FOR A COMPREHENSIVE PLAN AMENDMENT; PROVIDING FOR FILING WITH THE CLERK OF CIRCUIT COURT OF OKALOOSA COUNTY, THE CHIEF ADMINISTRATIVE OFFICER OF OKALOOSA COUNTY AND THE FLORIDA DEPARTMENT OF STATE; PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR REPEAL OF CONFLICTING CODES AND ORDINANCES; AND PROVIDING FOR AN EFFECTIVE DATE**

**BE IT ORDAINED BY THE CITY COUNCIL OF CRESTVIEW, FLORIDA AS FOLLOWS:**

**SECTION 1 – AUTHORITY.** The authority for enactment of this ordinance is Chapter 171, Florida Statutes, and Section 2 of the City Charter.

**SECTION 2 – LAND DESCRIPTION.** The following described unincorporated area contiguous to the City of Crestview, Florida, is hereby annexed to the City:

Parcel 02-3N-24-0000-0003-0000

A parcel of tract of land situated in Section 2 and Section 11, Township 3 North, Range 24 West, Okaloosa County, Florida, more particularly described as follows:

Begin at the Southeast corner of Section 2, also the Northeast corner of Section 11, Township 3 North, Range 24 West, Okaloosa County, Florida; thence proceed South 00 degrees 11' 08" West, along the East line of said Section 11, a distance of 125 feet, more or less, to a point on the Northerly Water's edge of Mathison Creek; thence departing the East line of said Section 11, meander Southwesterly along the Northerly water's edge of said Mathison Creek, a distance of 5809 feet, more or less, to a point on the West line of the Northeast Quarter of the Northwest Quarter of said Section 11; thence departing the Northerly Water's edge of said Mathison Creek, proceed North 00 degrees 17' 51" East, along the West line of the Northeast Quarter of the Northwest Quarter of said Section 11, a distance of 1188 feet, more or less, to a point on the South line of said Section 2, Township 3 North, Range 24 West Okaloosa County, Florida; thence proceed South 89 degrees 57' 01" East along the South line of said Section 2, a distance of 1188.70 feet; thence departing the South line of said Section 2, proceed North 00 degrees 30' 38" East a distance of 588.17 feet; thence proceed North 89 degrees 42' 25" East a distance of 2180.38 feet; thence proceed South 00 degrees 30' 36" West a distance of 31.61 feet; thence proceed South 89 degrees 57' 51" East, a distance of 460.69 feet to a point on the East line of said Section 2; thence proceed South 00 degrees 30' 44" West along the East line of said Section 2 a distance of 569.71 feet to the Point of Beginning of the parcel herein described.

Parcel 02-3N-24-0000-0003-0010

Commencing at the Southeast corner of Section 2, Township 3 North, Range 24 West, Okaloosa County, Florida; thence North 0 degrees 30 minutes 50 seconds East along the East line of said Section 2 for 604.52 feet; thence South 89 degrees 43 minutes 6 seconds West for 791.13 feet to the Point of Beginning; thence continue South 89 degrees 43 minutes 6 seconds West for 1849.96 feet; thence North 0 degrees 32 minutes 39 seconds East for 301.47 feet; thence North 89 degrees 43 minutes 57 seconds East for 1849.89 feet; thence South 0 degrees 31 minutes 29 seconds West for 301.01 feet to the Point of Beginning.

Parcel 02-3N-24-0000-0003-001C

Parcel "A"

Commence at the Southeast corner of Section 2, Township 3 North, Range 24 West, Okaloosa County, Florida; thence proceed North 00 degrees 30 minutes 50 seconds East, a distance of 1316.10 feet to the Point of Beginning; thence continue North 00 degrees 30 minutes 50 seconds East, a distance of 480.54 feet; thence proceed North 89 degrees 57 minutes 56 seconds West, a distance of 253.16 feet; thence proceed South 00 degrees 02 minutes 04 seconds West, a distance of 73.44 feet; thence proceed North 89 degrees 57 minutes 56 seconds West, a distance of 207.32 feet; thence proceed South 00 degrees 33 minutes 19 seconds West, a distance of 338.99 feet; thence proceed South 89 degrees 55 minutes 14 seconds East, a distance of 260.40 feet; thence proceed South 00 degrees 02 minutes 04 seconds West, a distance of 66.11 feet; thence proceed South 89 degrees 27 minutes 03 seconds East, a distance of 199.15 feet back to the Point of Beginning of the parcel herein described.

Parcel "B"

Commence at the Southeast corner of Section 2, Township 3 North, Range 24 West, Okaloosa County, Florida; thence proceed North 00 degrees 30 minutes 50 seconds East, a distance of 1336.19 feet; thence proceed North 89 degrees 50 minutes 47 seconds West, a distance of 790.93 feet; thence proceed North 00 degrees 31 minutes 29 seconds East, a distance of 66.00 feet to the Point of Beginning; thence continue North 00 degrees 31 minutes 29 seconds East, a distance of 329.83 feet; thence proceed South 89 degrees 26 minutes 50 seconds East, a distance of 265.00 feet; thence proceed South 00 degrees 33 minutes 19 seconds West, a distance of 329.84 feet; thence proceed North 89 degrees 26 minutes 41 seconds West, a distance of 264.82 feet back to the Point of Beginning of the parcel herein described.

Parcel 02-3N-24-0000-0003-001E

Parcel A-1

Commencing at the Southeast corner of Section 2, Township 3 North, Range 24 West, Okaloosa County, Fl.; thence North 0 degrees 30 minutes 50 seconds East along the East line of said Section 2 for 1798.60 feet to the Point of Beginning; thence North 89 degrees 57 minutes 56 seconds West for 253.16 feet; thence South 0 degrees 2 minutes 4 seconds West for 73.44 feet; thence North 89 degrees 57 minutes 56 seconds West 207.32 feet to the East margin of a road right of way 66 feet wide; thence North 0 degrees 33 minutes 19 seconds East along said right of way for 605.77 feet; thence North 89 degrees 55 minutes 11 seconds East along the South margin of a right of way 66 feet wide for 459.34 feet to the East line of Section 2; thence South 0 degrees 30 minutes 50 seconds West 533.24 feet along said East line of Section 2 to the Point of Beginning.

Parcel A-2

Commencing at the Southeast corner of Section 2, Township 3 North, Range 24 West, Okaloosa County, Fl.; thence North 0 degrees 30 minutes 50 seconds East along the East line of said Section 2 for 1798.60 feet; thence North 89 degrees 57 minutes 56 seconds West for 253.16 feet; thence South 0 degrees 2 minutes 4 seconds West for 73.44 feet; thence North 89 degrees 57 minutes 56

seconds West 273.32 feet to the West margin of a road right of way 66 feet wide and the Point of Beginning; thence North 0 degrees 33 minutes 19 seconds East along said right of way for 939.63 feet; thence North 89 degrees 56 minutes 17 seconds West for 265.50 feet; thence South 0 degrees 31 minutes 29 seconds West for 939.76 feet; thence South 89 degrees 57 minutes 56 seconds East for 265.00 feet to the Point of Beginning.

Parcel 02-3N-24-0000-0004-0000

A PORTION OF THE SOUTHEAST QUARTER OF SECTION 2, TOWNSHIP 3 NORTH, RANGE 24 WEST, OKALOOSA COUNTY, FLORIDA; BEING A PORTION OF THE PROPERTY DESCRIBED IN OFFICIAL RECORDS BOOK 1078, PAGE 187 OF THE PUBLIC RECORDS OF OKALOOSA COUNTY, FLORIDA; AND BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGINNING AT THE NORTHWEST CORNER OF SAID SOUTHEAST QUARTER; THENCE RUN N89°37'09"E ALONG THE NORTH LINE OF SAID SOUTHEAST QUARTER, A DISTANCE OF 1,850.29 FEET; THENCE RUN S00°05'39"W, A DISTANCE OF 932.12 FEET; THENCE RUN N89°52'40"W, A DISTANCE OF 132.07 FEET; THENCE RUN S00°05'39"W, A DISTANCE OF 329.82 FEET; THENCE RUN N89°52'31"W, A DISTANCE OF 367.93 FEET; THENCE RUN S46°31'41"W, A DISTANCE OF 200.00 FEET; THENCE RUN S13°04'28"W, A DISTANCE OF 211.40 FEET; THENCE RUN S38°02'26"E, A DISTANCE OF 150.00 FEET; THENCE RUN N78°01'30"E, A DISTANCE OF 334.12 FEET; THENCE RUN N40°04'06"E, A DISTANCE OF 425.00 FEET; THENCE RUN S00°05'39"W, A DISTANCE OF 437.23 FEET; THENCE RUN S89°23'00"W, A DISTANCE OF 1,853.26 FEET TO THE WEST LINE OF SAID SOUTHEAST QUARTER; THENCE RUN N00°11'15"E, A DISTANCE OF 1,772.83 FEET TO THE POINT OF BEGINNING.

**SECTION 3 – BOUNDARY.** The existing boundary line of the City of Crestview, Florida, is modified to include the herein referenced tract of land and the base, zoning and land use maps shall be updated to reflect these changes pursuant to law.

**SECTION 4 – LAND USE AND ZONING.** Pursuant to general law, the property hereby annexed was subject to Okaloosa County land development, land use plan, and zoning or subdivision regulations, which shall remain in full force and effect until rezoning and land use changes are finalized by the City in compliance with the Comprehensive Plan.

**SECTION 5 – COMPREHENSIVE PLAN UPDATE.** Pursuant to Chapter 163.011, et seq. petitioner for annexation shall apply through the City for a Comprehensive Plan change which will designate the future land use category for the parcel as Residential (R) with Single-Family Low-Density Dwelling District (R-1) to be assigned and run concurrent with the approval and adoption of the Comprehensive Plan amendment by the proper authorities.

**SECTION 6 – MAP UPDATE.** The Base, Zoning and Future Land Use Maps shall be updated at the earliest possible date.

**SECTION 7 – FILING.** Upon passage, the City Clerk is directed to file a copy of this ordinance with the Clerk of Circuit Court of Okaloosa County and with the Florida Department of the State.

**SECTION 8 – SEVERABILITY.** If any word, phrase, sentence, paragraph or provision of this ordinance or the application thereof to any person or circumstance is held invalid or unconstitutional, such finding shall not affect the other provisions or applications of this ordinance which can be given effect without the invalid or unconstitutional provision or application, and to this end the provisions of this ordinance are declared severable.



**SECTION 9 – SCRIVENER’S ERRORS.** The correction of typographical errors which do not affect the intent of this Ordinance may be authorized by the City Manager or the City Manager’s designee, without public hearing, by filing a corrected or re-codified copy with the City Clerk.

**SECTION 10 – ORDINANCE TO BE LIBERALLY CONSTRUED.** This Ordinance shall be liberally construed in order to effectively carry out the purposes hereof which are deemed not to adversely affect public health, safety, or welfare.

**SECTION 11 – REPEAL OF CONFLICTING CODES, ORDINANCES, AND RESOLUTIONS.** All Charter provisions, codes, ordinances and resolutions or parts of charter provisions, codes, ordinances and resolutions or portions thereof of the City of Crestview, in conflict with the provisions of this Ordinance are hereby repealed to the extent of such conflict.

**SECTION 12 – EFFECTIVE DATE.** This ordinance shall take effect immediately upon its adoption.

**PASSED AND ADOPTED ON SECOND READING BY THE CITY COUNCIL OF CRESTVIEW,**

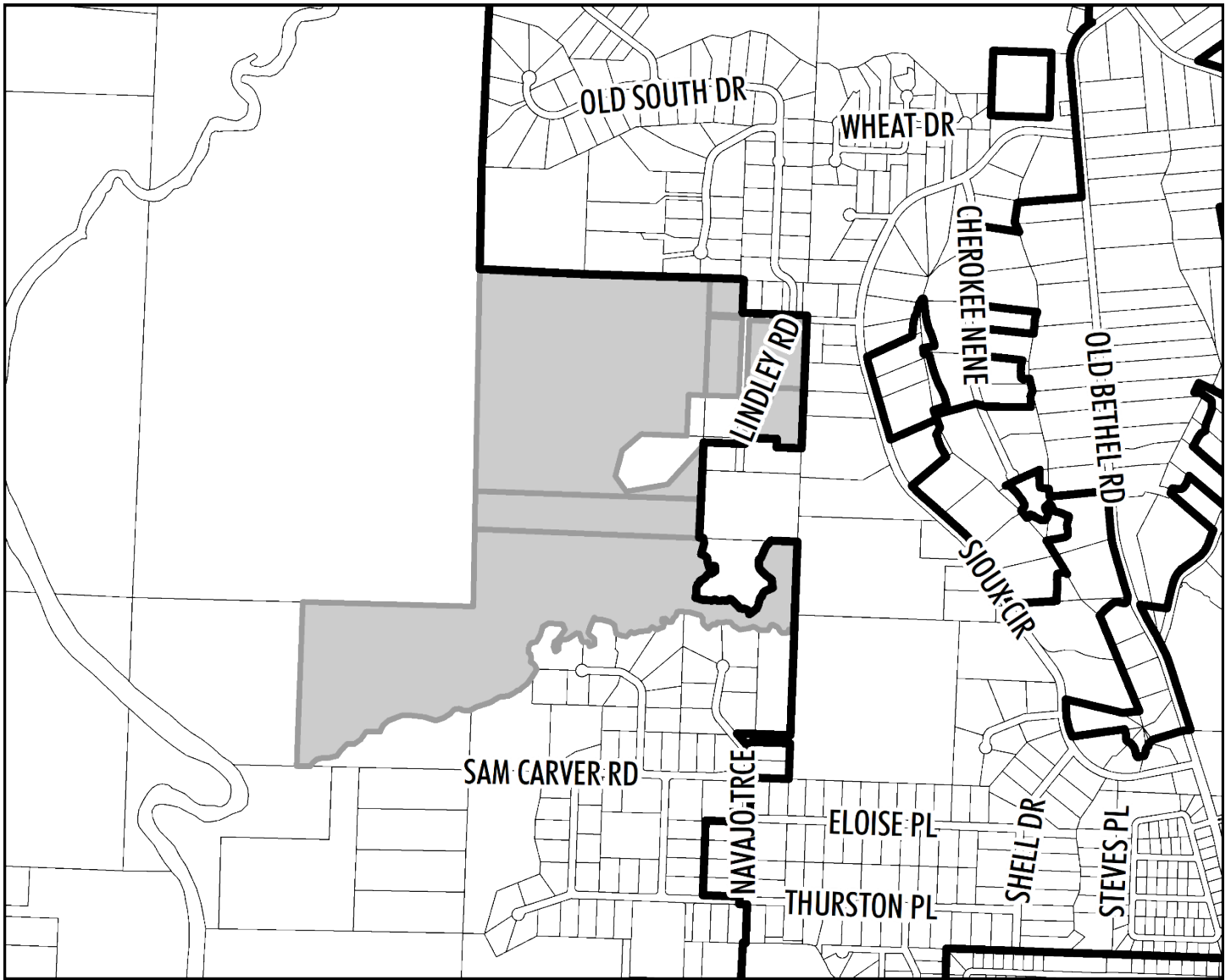
**FLORIDA ON THE \_\_\_\_\_ DAY OF \_\_\_\_\_, 2022.**

**ATTEST:**

\_\_\_\_\_  
**Maryanne Schrader**  
**City Clerk**

**APPROVED BY ME THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2022.**

\_\_\_\_\_  
**J. B. Whitten**  
**Mayor**

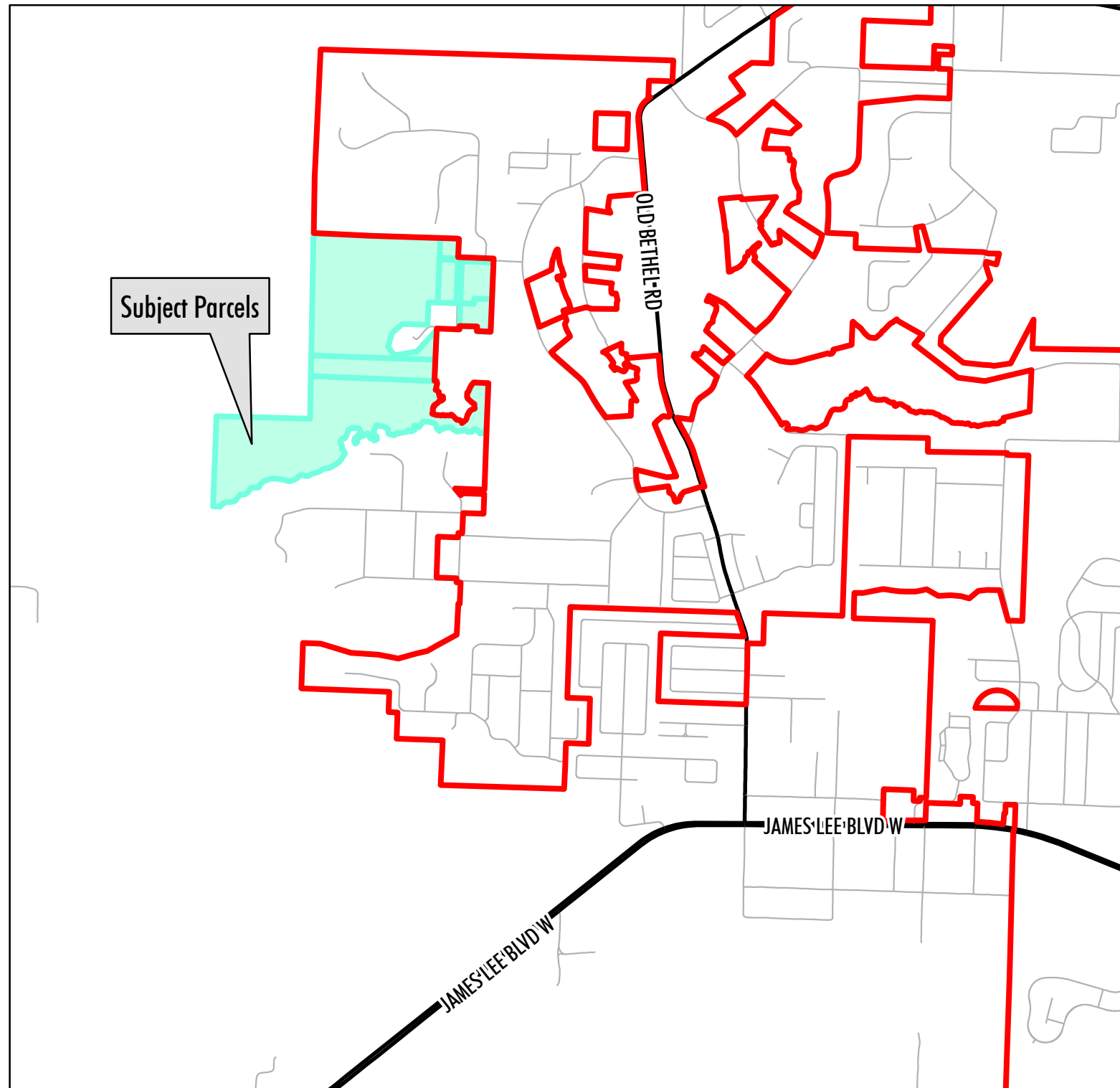


## Vicinity Map



Not to Scale

Subject Parcels



PREPARED BY CITY OF CRESTVIEW  
COMMUNITY DEVELOPMENT SERVICES  
PARCEL INFORMATION PROVIDED BY  
OKALOOSA COUNTY GIS DEPARTMENT  
NAD 1983 STATE PLANE, NORTH ZONE  
U.S. SURVEY FEET

# Existing Use

N



0 300 600  
Feet

## Legend

Subject Parcels

City Limits

## Existing Use

County

Improved A

Marsh

Manufactured Home

Mobile Home

Municipal

No AG Acre

Single Family

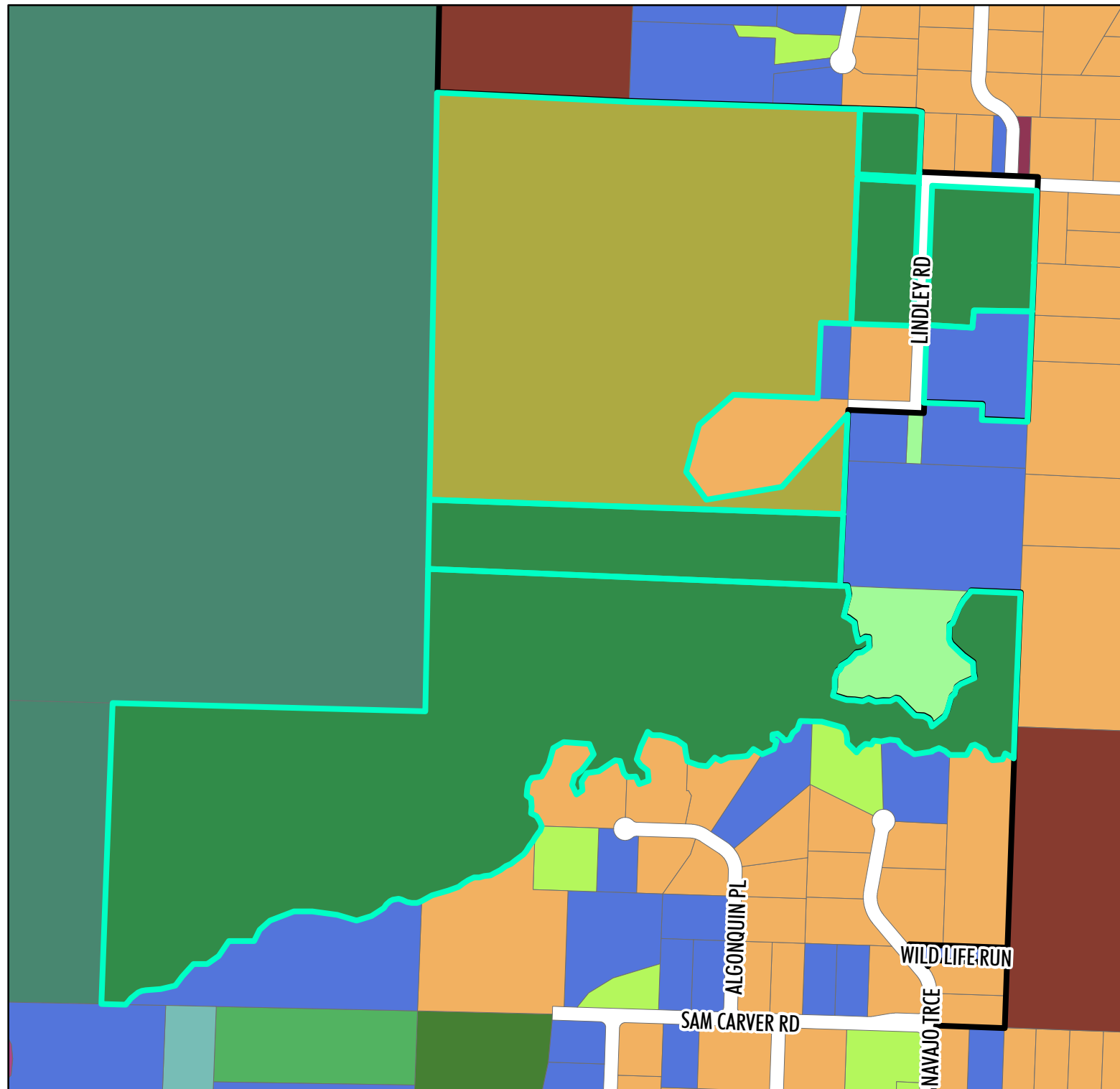
State Tiit

Timber

Timberland

Vacant

Water Management



PREPARED BY CITY OF CRESTVIEW  
COMMUNITY DEVELOPMENT SERVICES  
PARCEL INFORMATION PROVIDED BY  
OKALOOSA COUNTY GIS DEPARTMENT  
NAD 1983 STATE PLANE, NORTH ZONE  
U.S. SURVEY FEET

# Current Future Land Use



0 300 600  
Feet

## Legend

Subject Parcels

City Limits

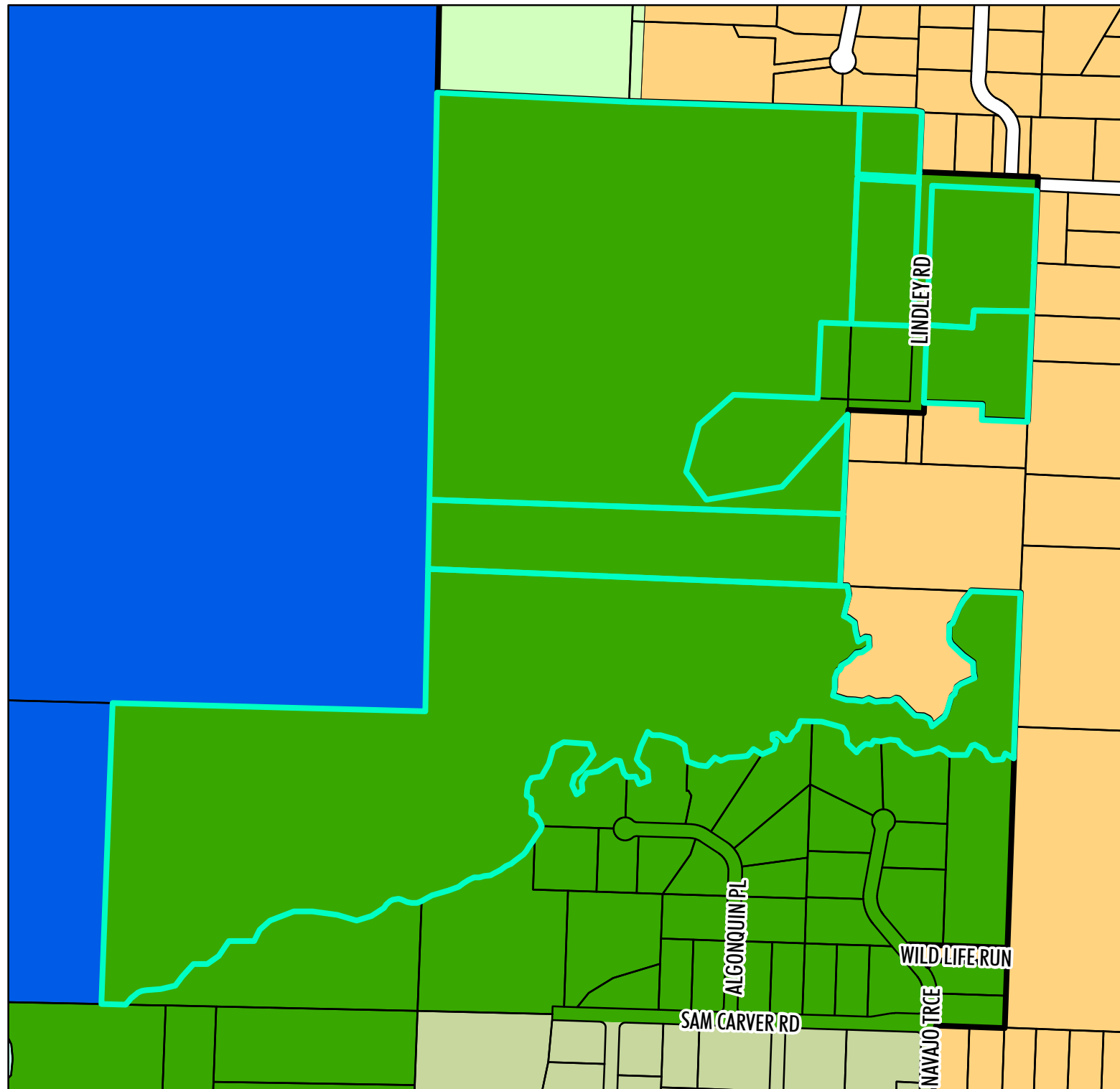
### City Future Land Use

- Commercial (C)
- Industrial (IN)
- Mixed Use (MU)
- Conservation (CON)
- Public Lands (PL)
- Residential (R)

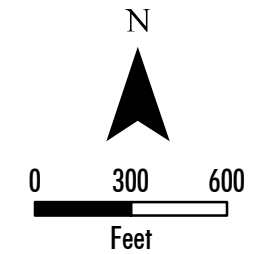
### County Future Land Use

- Agriculture (AG)
- Conservation (CON)
- Rural Residential (RR)
- Water

PREPARED BY CITY OF CRESTVIEW  
COMMUNITY DEVELOPMENT SERVICES  
PARCEL INFORMATION PROVIDED BY  
OKALOOSA COUNTY GIS DEPARTMENT  
NAD 1983 STATE PLANE, NORTH ZONE  
U.S. SURVEY FEET

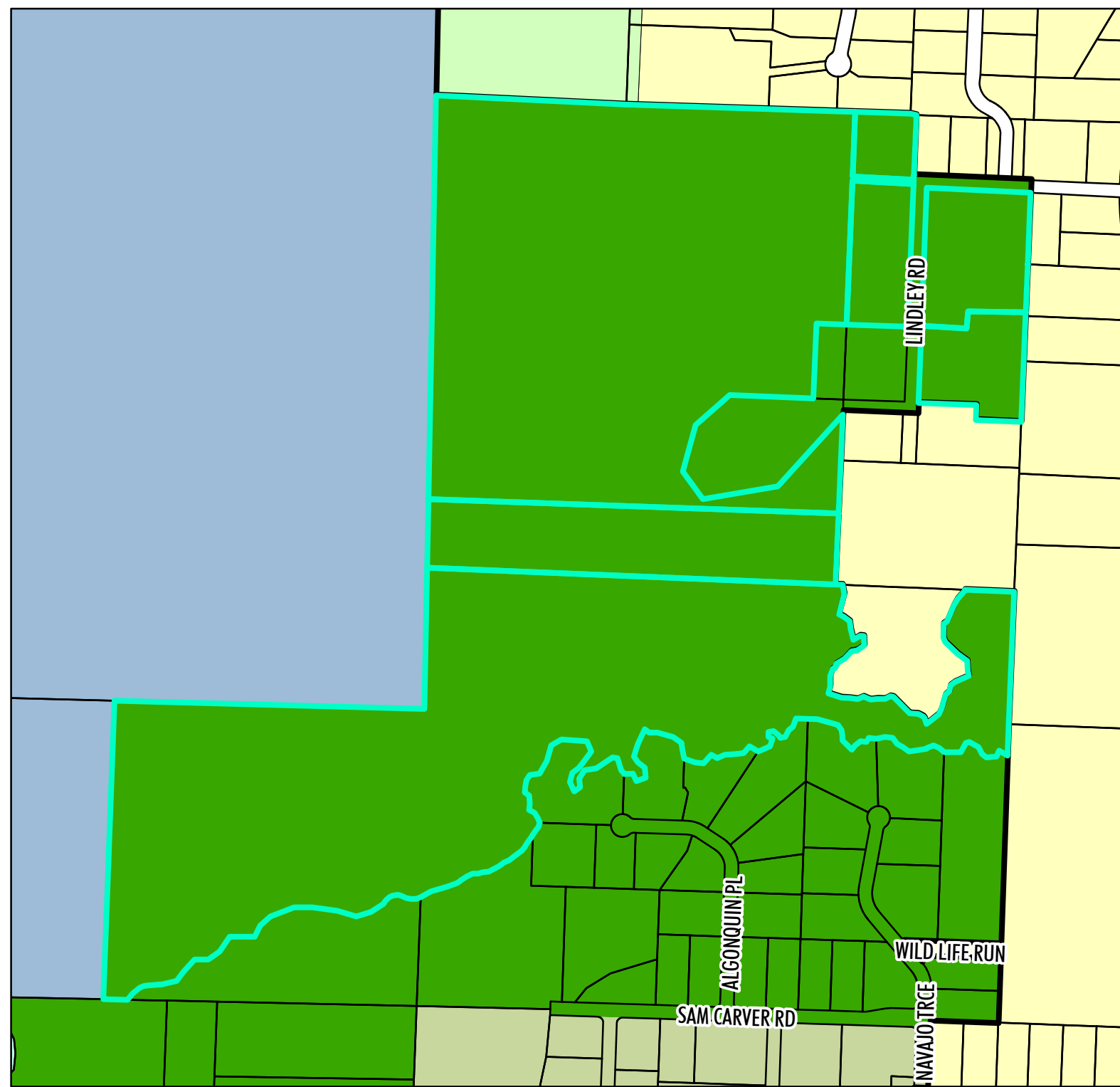


# Current Zoning



## Legend

- Subject Parcels
  - City Limits
- ### City Zoning
- Single Family Low Density District (R-1)
  - Single Family Medium Density District (R-2)
  - Single and Multi-Family Dwelling District (R-3)
  - Mixed Use (MU)
  - Commercial (C-1)
  - Commercial (C-2)
  - Industrial (IN)
  - Public Lands (P)
  - Conservation (E)
- ### County Zoning
- Agricultural (AA)
  - Rural Residential (RR)
  - Institutional (INST)
  - Water



PREPARED BY CITY OF CRESTVIEW  
COMMUNITY DEVELOPMENT SERVICES  
PARCEL INFORMATION PROVIDED BY  
OKALOOSA COUNTY GIS DEPARTMENT  
NAD 1983 STATE PLANE, NORTH ZONE  
U.S. SURVEY FEET

# Proposed Future Land Use



0 300 600  
Feet

## Legend

 Subject Parcels

 City Limits

### City Future Land Use

 Commercial (C)

 Industrial (IN)

 Mixed Use (MU)

 Conservation (CON)

 Public Lands (PL)

 Residential (R)

### County Future Land Use

 Agriculture (AG)

 Conservation (CON)

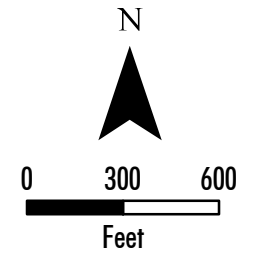
 Rural Residential (RR)

 Water

PREPARED BY CITY OF CRESTVIEW  
COMMUNITY DEVELOPMENT SERVICES  
PARCEL INFORMATION PROVIDED BY  
OKALOOSA COUNTY GIS DEPARTMENT  
NAD 1983 STATE PLANE, NORTH ZONE  
U.S. SURVEY FEET



# Proposed Zoning



## Legend

Subject Parcels

City Limits

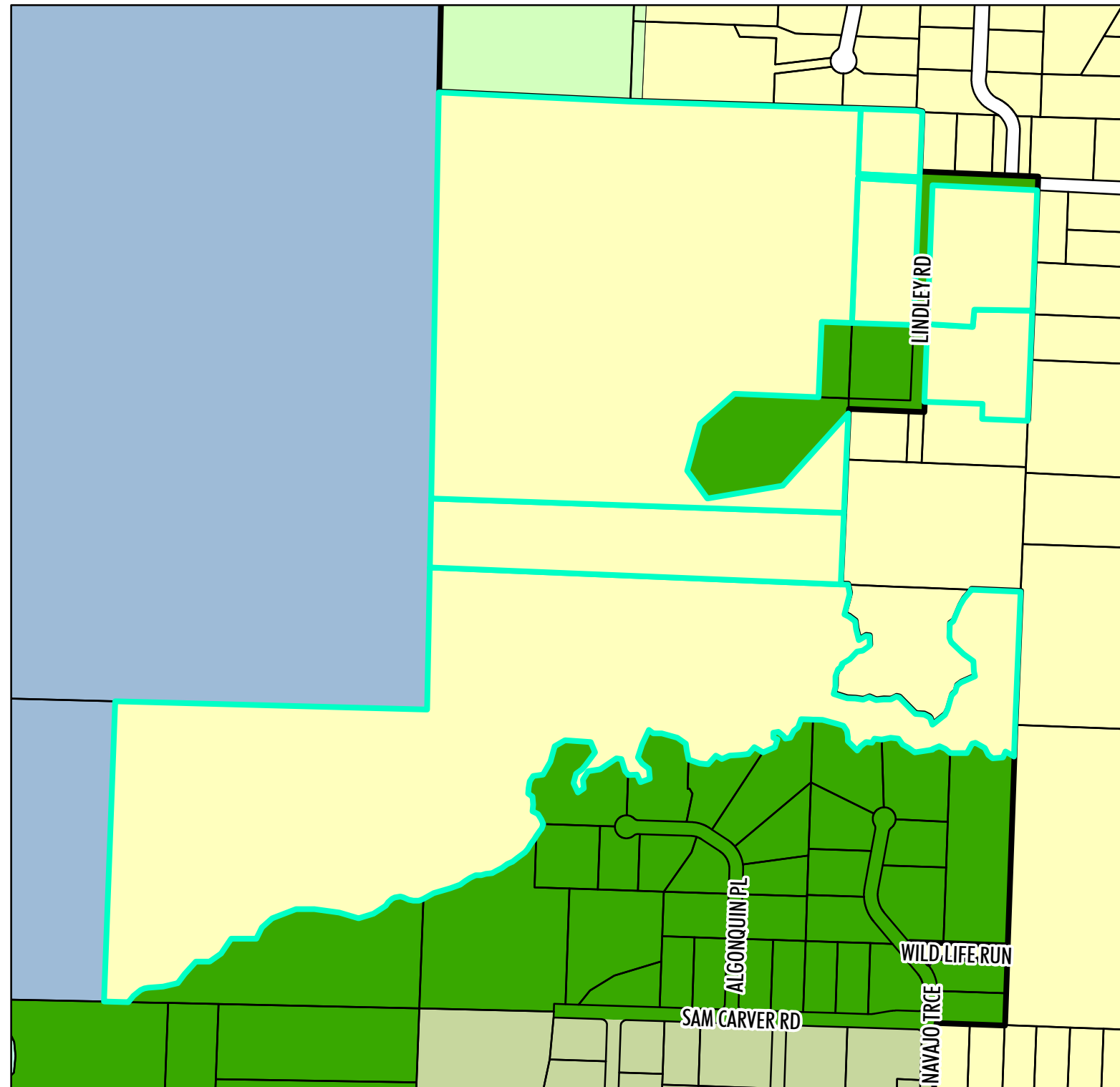
## City Zoning

- Single Family Low Density District (R-1)
- Single Family Medium Density District (R-2)
- Single and Multi-Family Dwelling District (R-3)
- Mixed Use (MU)
- Commercial (C-1)
- Commercial (C-2)
- Industrial (IN)
- Public Lands (P)
- Conservation (E)

## County Zoning

- Agricultural (AA)
- Rural Residential (RR)
- Institutional (INST)
- Water

PREPARED BY CITY OF CRESTVIEW  
COMMUNITY DEVELOPMENT SERVICES  
PARCEL INFORMATION PROVIDED BY  
OKALOOSA COUNTY GIS DEPARTMENT  
NAD 1983 STATE PLANE, NORTH ZONE  
U.S. SURVEY FEET





# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: 2nd Reading

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Nicholas Schwendt, Gis  
DATE: 1/18/2022  
SUBJECT: Ordinance 1850 - Amendment to LDC Section 8.04.00 - Street Access and Driveway Design Requirements

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**BACKGROUND:**

Upon the approval and adoption of the new Land Development Code, staff acknowledged that there may be a number of items within the Land Development Code that would eventually need to be changed once put into practice. Staff's understanding and expectation was that these items would become evident over time, and that corrections could be made over time. Staff brought a number of these amendments through the Planning Board and City Council for approval in 2021.

The Planning and Development Board recommended approval on January 3, 2022 and the first reading was on January 10, 2022.

**DISCUSSION:**

Currently, Sections 8.04.00(A)(4)(b) and (6) of the Land Development Code requires that the edge of a driveway for all uses other than a single family dwelling located at least 75 feet from the right-of-way line of a street intersection, and 25 feet from any other property line.

Since implementing the Land Development Code in project review, staff has determined that this specific section of code is unnecessary in regards to its intent of creating safe distances between accessways. It is deemed unnecessary due to this intent being sufficiently substantiated by other portions of the code, namely Table 8.03.00, which provides for spacing between access drives based on road classification, and the landscape buffer requirements in Section 6.08.08, which requires access drives to be setback from the property line to an appropriate degree based on the zoning of adjacent properties.

Additionally, staff has determined that this section of code can very easily cause undue hardship for a property owner or developer, preventing them from developing their property in a way that is compliant with other zoning and land development code requirements. This hardship would be experienced most by smaller, local developments and small businesses that could contribute to the small-town cultural feel of Crestview, specifically in the downtown area and its vicinity. For example, if a developer wanted to build a small commercial development in a mixed-use zone on what was originally platted as a 60 foot lot, they would not be able to construct a compliant access drive due to the requirements of this section.

Staff is proposing this ordinance amend Section 8.04.00 to remove the aforementioned subsections 8.04.00(A)(4)(b) and 8.04.00(A)(6).

**GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Infrastructure-* Satisfy current and future infrastructure needs

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Community Character-* Promote desirable growth with a hometown atmosphere

*Safety-* Ensure the continuous safety of citizens and visitors

*Mobility-* Provide safe, efficient and accessible means for mobility

*Opportunity-* Promote an environment that encourages economic and educational opportunity

*Community Culture-* Develop a specific identity for Crestview

### **FINANCIAL IMPACT**

This item will have no impact on the City budget.

### **RECOMMENDED ACTION**

Request motion to adopt Ordinance 1850 on 2nd reading.

### **Attachments**

1. Attachment 1

**ORDINANCE: 1850**

**AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA,  
PROVIDING FOR THE AMENDMENT OF SECTION 8.04.00 – STREET  
ACCESS AND DRIVEWAY DESIGN REQUIREMENTS OF THE LAND  
DEVELOPMENT CODE; PROVIDING FOR AUTHORITY;  
PROVIDING FOR SEVERABILITY; PROVIDING FOR SCRIVENER’S  
ERRORS; PROVIDING FOR LIBERAL INTERPRETATION;  
PROVIDING FOR REPEAL OF CONFLICTING CODES AND  
ORDINANCES; AND PROVIDING FOR AN EFFECTIVE DATE**

**BE IT ORDAINED BY THE CITY COUNCIL OF CRESTVIEW, FLORIDA, AS FOLLOWS:**

**SECTION 1 – AUTHORITY.** The authority for enactment of this ordinance is Section 166.041, Florida Statutes and The City of Crestview Land Development Code.

**SECTION 2 – LAND DEVELOPMENT CODE AMENDMENTS.** Section 8.04.00 – Street Access and Driveway Design Requirements is hereby amended to remove subsection 8.04.00(A)(4)(b) and 8.04.00(6), as attached to this ordinance (Attachment 1).

**SECTION 3 – SEVERABILITY.** If any word, phrase, sentence, paragraph or provision of this ordinance or the application thereof to any person or circumstance is held invalid or unconstitutional, such finding shall not affect the other provisions or application of this ordinance which can be given effect without the invalid or unconstitutional provision or application, and to this end the provisions of this ordinance are declared severable.

**SECTION 4 – SCRIVENER’S ERRORS.** The correction of typographical errors which do not affect the intent of this Ordinance may be authorized by the City Manager or the City Manager’s designee, without public hearing, by filing a corrected or re-codified copy with the City Clerk.

**SECTION 5 – ORDINANCE TO BE LIBERALLY CONSTRUED.** This Ordinance shall be liberally construed in order to effectively carry out the purposes hereof which are deemed not to adversely affect public health, safety, or welfare.

**SECTION 6 – REPEAL OF CONFLICTING CODES, ORDINANCES, AND RESOLUTIONS.** All Charter provisions, codes, ordinances and resolutions or parts of charter provisions, codes, ordinances and resolutions or portions thereof of the City of Crestview, in conflict with the provisions of this Ordinance are hereby repealed to the extent of such conflict.

**SECTION 7 – EFFECTIVE DATE.** This ordinance shall take effect immediately upon its adoption.

**PASSED AND ADOPTED ON SECOND READING BY THE CITY COUNCIL OF CRESTVIEW,  
FLORIDA ON THE \_\_\_\_\_ DAY OF \_\_\_\_\_, 2022.**

**ATTEST:**

\_\_\_\_\_

**MARYANNE SCHRADER**  
City Clerk

**APPROVED BY ME THIS** \_\_\_\_\_ **DAY OF** \_\_\_\_\_, 2022.

\_\_\_\_\_  
**J. B. WHITTEN**  
Mayor

## 8.04.00 - STREET ACCESS AND DRIVEWAY DESIGN REQUIREMENTS

- A. All ingress and egress driveways onto a City street shall be located to allow the greatest degree of safety to both pedestrian and vehicular traffic on a City street. All proposed development must meet these standards for vehicular access and circulation:
1. Access design shall ensure that an entering standard passenger vehicle will not encroach upon the exit lane of a two-way driveway.
  2. Access design shall ensure that a right-turning exit vehicle shall be able to see only the first through traffic lane available without encroaching into the adjacent through lane.
  3. There shall be sufficient onsite storage to accommodate queued vehicles waiting to park or exit without using any portion of the street right-of-way or in any other way interfering with street traffic.
  4. Number, location, and separation requirements for driveways. Driveways shall be designed to adequately accommodate the volume and normal character of vehicles anticipated to be attracted to the development.
    - a. The number of driveways shall be determined by existing site conditions and ensuring safe and efficient access and use for both pedestrian and vehicular traffic on a City Street.
    - ~~b. The edge of a driveway for all uses other than a single-family residential dwelling shall be located a minimum of seventy-five (75) feet from the right-of-way line of a street intersection.~~
    - ~~c. The edge of a driveway for a single-family residential dwelling shall be located a minimum of twenty-five (25) feet from the right-of-way line of a street intersection.~~
  5. Where two (2) or more driveways connect a single development site to any one (1) City street, a minimum clear distance of fifty (50) feet, measured along the curb line of the proposed driveway curbs, shall be provided.
  - ~~6. The edge of a driveway for uses other than a single-family residential dwelling shall be located a minimum of twenty-five (25) feet from the proposed property line. Where a property line is the same as the right-of-way line referenced in 8.04.00(A)(4)(b), the minimum distance shall be the standards in 8.04.00(A)(4)(b).~~
  7. Opposing driveway intersections.
    - a. Opposing driveway intersections for uses other than a single-family dwelling shall be located directly across from each other along City streets.
    - b. If conditions prohibit locating a proposed driveway intersection directly opposite an existing or proposed driveway intersection along a City street, the offsets between the existing and proposed intersections shall be a minimum of one hundred fifty (150) feet.
  8. Driveways shall be located and designed to ensure that vehicles do not back onto any right-of-way, except for driveways serving a single-family dwelling in single-family developments and residential zoning districts.
- B. Driveway Design.
1. Depressed curbing may be required across driveway openings, in order to promote the continual flow of street stormwater runoff.
  2. Driveways shall intersect the City street at an angle as near ninety (90) degrees as site conditions permit, and in no case shall be less than seventy-five (75) degrees.
  3. All driveway aprons shall be paved from the existing or proposed edge of pavement back to the existing or proposed right-of-way line. Paving within this area shall comply with the City's paving specifications as set forth in the Crestview Engineering Standards Manual.
  4. Driveways located within a state or county right-of-way shall be designed in accordance with State or County Standards.



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: 2nd Reading

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Nicholas Schwendt, Gis  
DATE: 1/18/2022  
SUBJECT: Ordinance 1851 - Amendment to LDC Section 6.01.02 – Residential Design Standards

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## **BACKGROUND:**

Currently, the Land Development Code requires that 'All single family dwellings shall be situated on the lot so that the front door of the home faces the front yard'. (Section 6.01.02(D)). This requirement extends to manufactured homes, which are considered single family dwellings.

In recent years, planning staff has received substantial pushback regarding this requirement, due to a number of reasons and factors, from a number of property owners, manufactured home companies, and realtors. Staff and the Planning Board have previously discussed this item at two Planning Board meetings, with staff being tasked to draft an Ordinance providing for the amendment of this code section, changing the requirement for the front door to face the front yard.

The Planning and Development Board recommended approval on January 3, 2022 and the first reading was on January 10, 2022.

## **DISCUSSION:**

In discussions with the Planning Board, it was determined that the Board would like to see an ordinance that serves to amend the specific issue of the front door facing the front yard, while keeping additional amendments to this section of code minimal.

Staff has since drafted an ordinance that accomplishes this goal. The proposed ordinance amends the code to allow manufactured, mobile or modular homes to have front doors that may be up to 90 degrees from the front yard, to face the side yard. It also proposes a limitation to prevent front doors from facing rear yards, as well as prevent fences taller than 4 feet in between the front door and front property line.

## **GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Community Character-* Promote desirable growth with a hometown atmosphere

*Safety-* Ensure the continuous safety of citizens and visitors

*Mobility-* Provide safe, efficient and accessible means for mobility

*Community Culture-* Develop a specific identity for Crestview



**FINANCIAL IMPACT**

This item will have no impact on the City budget.

**RECOMMENDED ACTION**

Staff requests a motion to adopt Ordinance 1851 on 2nd reading.

**Attachments**

1. Attachment 1

**ORDINANCE: 1851**

**AN ORDINANCE OF THE CITY OF CRESTVIEW, FLORIDA,  
PROVIDING FOR THE AMENDMENT OF SECTION 6.01.02 –  
RESIDENTIAL DESIGN STANDARDS OF THE LAND DEVELOPMENT  
CODE; PROVIDING FOR AUTHORITY; PROVIDING FOR  
SEVERABILITY; PROVIDING FOR SCRIVENER’S ERRORS;  
PROVIDING FOR LIBERAL INTERPRETATION; PROVIDING FOR  
REPEAL OF CONFLICTING CODES AND ORDINANCES; AND  
PROVIDING FOR AN EFFECTIVE DATE**

**BE IT ORDAINED BY THE CITY COUNCIL OF CRESTVIEW, FLORIDA, AS FOLLOWS:**

**SECTION 1 – AUTHORITY.** The authority for enactment of this ordinance is Section 166.041, Florida Statutes and The City of Crestview Land Development Code.

**SECTION 2 – LAND DEVELOPMENT CODE AMENDMENTS.** Section 6.01.02 – Residential Design Standards is hereby amended to revise subsection D, adding an exception to the front door requirements, and additional requirements, as attached to this ordinance (Attachment 1).

**SECTION 3 – SEVERABILITY.** If any word, phrase, sentence, paragraph or provision of this ordinance or the application thereof to any person or circumstance is held invalid or unconstitutional, such finding shall not affect the other provisions or application of this ordinance which can be given effect without the invalid or unconstitutional provision or application, and to this end the provisions of this ordinance are declared severable.

**SECTION 4 – SCRIVENER’S ERRORS.** The correction of typographical errors which do not affect the intent of this Ordinance may be authorized by the City Manager or the City Manager’s designee, without public hearing, by filing a corrected or re-codified copy with the City Clerk.

**SECTION 5 – ORDINANCE TO BE LIBERALLY CONSTRUED.** This Ordinance shall be liberally construed in order to effectively carry out the purposes hereof which are deemed not to adversely affect public health, safety, or welfare.

**SECTION 6 – REPEAL OF CONFLICTING CODES, ORDINANCES, AND RESOLUTIONS.** All Charter provisions, codes, ordinances and resolutions or parts of charter provisions, codes, ordinances and resolutions or portions thereof of the City of Crestview, in conflict with the provisions of this Ordinance are hereby repealed to the extent of such conflict.

**SECTION 7 – EFFECTIVE DATE.** This ordinance shall take effect immediately upon its adoption.

**PASSED AND ADOPTED ON SECOND READING BY THE CITY COUNCIL OF CRESTVIEW,  
FLORIDA ON THE \_\_\_\_\_ DAY OF \_\_\_\_\_, 2022.**

**ATTEST:**

\_\_\_\_\_

**MARYANNE SCHRADER**  
City Clerk

**APPROVED BY ME THIS** \_\_\_\_\_ **DAY OF** \_\_\_\_\_, 2022.

\_\_\_\_\_  
**J. B. WHITTEN**  
Mayor

### 6.01.02 - Residential Design Standards

All single-family dwellings, whether site-built or built off-site and moved onto the lot shall comply with the following design standards. In all cases below, the Florida Building Code, Residential shall be complied with.

- A. The minimum length and width of the building shall be twenty (20) feet.
- B. The minimum roof pitch shall be 3:12.
- C. The minimum roof overhang shall be twelve (12) inches, exclusive of porches and patios.
- D. All single family dwellings shall be situated on the lot so that the front door of the home faces the front yard.
  - 1. Mobile homes, manufactured homes, or modular homes not located within a manufactured home community may be oriented up to 90 degrees to the front yard on the lot in any way which the location of the front door may face the side yard. In no case shall the front door of the home face a rear yard.
  - 2. Properties containing mobile homes, manufactured homes, or modular homes placed per the provisions of 6.01.02(D)(1) may not have any fences taller than 4 feet located between the front door of the home and the front property line.
  - 0.3. All other aforementioned development standards in section 6.00.00 shall be required, other than those that are superseded in this subsection.
- E. The building shall be constructed according to standards established by the Florida Building Code, Residential.
- F. The exterior siding material shall consist of approved materials in accordance with the Florida Building Code, Residential. Where vinyl lap siding is used, the siding shall not have a glossy surface or be reflective.
- G. The dwelling shall be attached to a permanent foundation system, including supporting, blocking, leveling, securing, and anchoring the home and connecting multiple and expandable sections of the home. The foundation shall be designed and constructed according to the requirements of the current Florida Building Code, Residential.
- H. Roof materials shall be any material approved by the Florida Building Code, Residential.
- I. For dwellings elevated forty-eight (48) inches or less, the area beneath the home shall be enclosed by brick, concrete, wood, rock, vinyl or other materials specifically manufactured for this purpose and shall enclose the space between the floor joists and the ground level, except for the required minimum ventilation and access. Such access shall remain closed when not being used for that purpose.
- J. For manufactured homes, all tongues, wheels, axles, transporting lights and other towing apparatus shall be removed from the site prior to occupancy.
- K. For manufactured homes, none manufactured before June 15, 1976 shall be permitted.
- L. At each exterior door, there shall be a landing that is in accordance with the Florida Building Code, Residential.
- M. Duplex (two connected single-family dwelling unit) structures
  - 1. May be placed across a single side property line, at the line of unit separation, provided all other zoning requirements and setbacks are observed, and the unit-separating wall meets the appropriate standards of the Florida Building Code and any applicable fire codes.
  - 2. The minimum length and width of each duplex unit shall be twenty (20) feet.
  - 3. All other aforementioned design standards in section 6.01.02 shall be required, other than those that are superseded in this subsection.
  - 4. Each unit in a duplex structure must have its own utility connections.



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Action Item

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Kyle Lusk  
DATE: 1/20/2022  
SUBJECT: Task Order 2022-02 for Professional Engineering and Consulting Services for the SR 85 Bypass East-West Connector Utility Design and Permitting

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**BACKGROUND:**

The proposed North-South bypass and East-West connector is planned to route from Antioch Rd to the northeast in general alignment with Arena Rd before turning north where it will intersect Hwy 90 at Old Bethel Rd. The City will provide water and sewer services for future developments along this corridor.

Along this northern section of the proposed road is a bridge to cross a creek and the railroad right-of-way. HDR has requested the City provide design drawings and technical specifications of the water and sewer mains crossing the bridge for inclusion in their Bid Documents for the roadway project.

**DISCUSSION:**

This task order will allow Jacobs to coordinate with HDR to gather design documents including design requirements, support details, locations of additional utilities, survey data and CADD files which will be used as the base files for this project. Jacobs will also coordinate with the City to determine desired pipe sizes and materials for the bridge crossing and connection details. Jacobs will also prepare the FDEP permit applications for water and wastewater permits to authorize the construction and operation of the new water main and sewer force main.

**GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Infrastructure-* Satisfy current and future infrastructure needs

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Safety-* Ensure the continuous safety of citizens and visitors

*Mobility*- Provide safe, efficient and accessible means for mobility

*Opportunity*- Promote an environment that encourages economic and educational opportunity

**FINANCIAL IMPACT**

Task Order 2022-02 will cost \$17,470. It will be part of the overall cost of the North-South Bypass and East-West Connector Road project and has been included in the Capital Improvements Fund under the Water Division.

**RECOMMENDED ACTION**

Staff requests a motion to approve the task order in the amount of \$17, 470.

**Attachments**

1. TO 2022-02\_North-South Bypass Utilities

# **TASK ORDER 2022 - 02**

THIS TASK ORDER IS ISSUED PURSUANT TO THE STANDARD MASTER AGREEMENT FOR PROFESSIONAL SERVICES DATED MAY 3, 2021 (AGREEMENT), FOR THE CITY OF CRESTVIEW, FLORIDA, WHICH IS INCORPORATED HEREIN BY THIS REFERENCE, WITH RESPECT TO

## **Professional Engineering and Consulting Services for the SR 85 Bypass East-West Connector Utility Design and Permitting**

### **Article A. Purpose**

The City of Crestview (CLIENT) has seen significant population growth in recent years and that growth has created the need to expand and build new residential communities. To accommodate this growth the SR 85 bypass road is planned to be constructed to connect Antioch Road to Hwy 90 and has been designed by HDR Engineering. In preparation for future utility service needs, a water main and sanitary sewer force main are proposed to be installed across the proposed east-west connector bridge. The purpose of Task Order 2022-02 is to authorize and direct Jacobs Engineering Group Inc (Jacobs) to proceed with the professional engineering and consulting services for preparing a design plans and technical specifications for the water and sewer mains across the bridge.

### **Article B. Scope of Services:**

#### **Project Understanding**

The proposed SR 85 bypass and east-west connector is planned to route from Antioch Rd to the northeast in general alignment with Arena Rd towards the City of Crestview's Wastewater Treatment Facility before turning north where it will intersect Hwy 90 at Old Bethel Rd. Along this northern section of the proposed road is a roughly 1,900 linear foot bridge to cross a creek and railroad. HDR has requested the City provide design drawings and technical specifications of the water and sewer mains crossing the bridge for inclusion in their Bid Documents for the roadway project.

The scope of services provided with this task order is outlined in detail below.

#### **Task 1 – Utility Design Documents**

##### **1.1 Data Collection and Coordination**

Jacobs will coordinate with HDR to gather design documents including design requirements, support details, locations of additional utilities, survey data, CADD files which will be used as the base files for this project. Jacobs will also coordinate with the CLIENT to determine desired pipe sizes and materials for the bridge crossing and connection details. A coordination meeting will be held with HDR to discuss the project scope and receive direction on where the CLIENT's utilities are required to be located and all pipe support requirements.

## **1.2 Design Documents**

Jacobs will begin preparing the design documents upon receiving approval of the pipe selections from the City and installation instructions from HDR. The design documents will include construction plans and technical specifications for the utility crossings. Jacobs will develop the following submittals and submit to the City and HDR for review and comment:

### ***90% Submittal***

The 90% submittal will provide detailed drawings that include developed General and Civil sheets. Jacobs will utilize HDR's bridge design drawings as the base drawing file and will add the City's water and sewer mains to the plan and profile drawings. Standard detail drawings will also be prepared. Detailed technical specifications specifically pertaining to the utilities will also be provided.

### ***Released for Bid Submittal***

Jacobs will compile comments from the 90% deliverable and finalize any remaining information into a compiled package for issuance to HDR for bidding. The compiled design package will only include detailed drawings of the utilities and a final technical specification package.

Jacobs will submit 2 hard copies and a PDF copy at each submittal phase and will conduct a review meeting to address comments and questions regarding information presented.

### ***Deliverables***

Under this subtask, Jacobs will deliver to CLIENT the following items:

- 90% submittal
- Released for Bid submittal

## **1.3 Permitting**

Jacobs will prepare the application for water and wastewater permits to authorize the construction and operation of the new water main and sewer force main. Jacobs will fill out and complete FDEP form 62-555.900(7), Notice of Intent to use the General Permit for Construction of Water Main Extensions for PWSs application. Additionally, Jacobs will fill out and complete FDEP form 62-604.300(3)(a), Notification/Application for Constructing a Domestic Wastewater Collection/Transmissions System application.

Jacobs will provide written responses for up to two requests for additional information submitted by FDEP to the CLIENT.

### ***Deliverables***

Jacobs will provide the following deliverables as a result of this task:

- FDEP 62-555.900(7) permit application
- FDEP 62-604.300(3)(a) permit application



## **Assumptions and Specific Conditions**

The following assumptions have been taken into consideration in the preparation of this Scope of Services and compensation. These assumptions are based on the project scope, which is to deliver to the CLIENT an electronic copy of all technical memorandums.

Should deviations from these assumptions be required to deliver the services described in this scope of services, the scope of work and compensation shall be modified accordingly and approved by the CLIENT in writing before any changes to this scope of services can be implemented or delivery of the original scope of services completed.

- Design drawings will be prepared on bridge design drawings provided by HDR and will utilize all survey information supplied therein.
- The utility design and construction will be held within the boundaries of up to 100 linear feet beyond each end of the new bridge.
- FDOT permits are assumed to be prepared and obtained by HDR and are not included in this Task Order.
- Front-end documents and general project related Division 01 specifications will not be included within this Task Order. It is assumed HDR will incorporate the design drawings and technical specifications into their project contract documents for bidding.
- The CLIENT will submit the permit application fee to FDEP.
- Construction phase engineering services are not included in this Task Order.

## Article C. Project Schedule

Work will begin upon execution of this task order. A preliminary milestone schedule is shown below.

**TABLE 1 – PRELIMINARY SCHEDULE**  
East-West Connector Bridge Utility Design and Permitting

| Task                                   | Projected Completion Date                       |
|----------------------------------------|-------------------------------------------------|
| 1.1 – Data Collection and Coordination | Within 3 weeks of NTP                           |
| 1.2 – Design Documents                 |                                                 |
| 90% Documents                          | Within 6 weeks of completion of Task 1.1        |
| Released for Bid Documents             | Within 3 weeks of receiving review 90% comments |
| 1.3 – Permitting                       | Within 2 weeks of completion of Task 1.2        |

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## Article D. Compensation

As compensation for providing the services described in Article B. Scope of Services of this task order, the CLIENT shall pay Jacobs in accordance with Section 5 of the Agreement, on a time and material basis with a not-to-exceed amount of \$17,470. This amount includes work performed by drilling and surveying subcontractors. The estimated breakdown of fees is shown in Table 2 below.

**TABLE 2 – ESTIMATED FEE SUMMARY**  
East-West Connector Bridge Utility Design and Permitting

| Task                                                                     | Estimated Fee Amount |
|--------------------------------------------------------------------------|----------------------|
| Task 1.1 and 1.2 – Data Collection and Coordination and Design Documents | \$13,970             |
| Task 1.3 – Permitting                                                    | \$3,000              |
| General Expenses                                                         | \$500                |
| Total                                                                    | \$17,470             |

## Article E. Authorized Representatives

The Authorized Representatives designated below are authorized to act with respect to Task Order 2022-02. Communications between the parties and between Jacobs's subcontractors shall be through the Authorized Representatives:

| For the City of Crestview, Florida                           | For Jacobs                                                                |
|--------------------------------------------------------------|---------------------------------------------------------------------------|
| <b>Name:</b> Wayne Steele                                    | <b>Name</b> Scott Jernigan                                                |
| <b>Address:</b> P.O. Drawer 1209<br>Crestview, Florida 32536 | <b>Address:</b> 25 W. Cedar Street, Suite 350<br>Pensacola, Florida 32502 |
| <b>Telephone:</b> (850) 682-6134                             | <b>Telephone:</b> (850) 941-7282                                          |

## Article F. Authorization:

|                                                   |                                   |
|---------------------------------------------------|-----------------------------------|
| Task Order 2022-02 is effective as of _____, 2022 |                                   |
| <b>Accepted for CLIENT by:</b>                    | <b>Accepted for Jacobs by:</b>    |
|                                                   |                                   |
| <b>Name:</b> J.B. Whitten                         | <b>Name:</b> David Stejskal, P.E. |
| <b>Title:</b> Mayor                               | <b>Title:</b> Vice President      |



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Action Item

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Gina Toussaint, Finance Director  
DATE: 1/20/2022  
SUBJECT: Approval of Auditing Services Firm

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**BACKGROUND:**

A Request for Proposals (RFP) for Independent Auditing Services was advertised on December 10, 2021. Responses to the RFP were due by January 6, 2022 at 2:00 p.m.

**DISCUSSION:**

Two proposals were received and opened by the City Clerk on January 6th, 2022 at 2:00 p.m. The following two firms submitted proposals: (1) Purvis Gray, Certified Public Accountants, and (2) Warren Averett, CPAs and Advisors.

As required by the State of Florida Auditor General, the auditor selection committee consists of at least three members, one of which is a member of the governing body and who must serve as the committee chair. Other members must consist of non-employees of the municipality. The committee, as selected by the City Manager, met on January 12, 2022. This meeting was to distribute the RFP's and to receive instructions from the Finance Director and the City Clerk. At this time, the official evaluation committee meeting was scheduled for January 18, 2022.

At the evaluation meeting, all committee members had the opportunity to discuss their scoring of the various qualification criteria requested in the RFP and provide feedback as warranted. The committee unanimously selected Purvis Gray, Certified Public Accountants.

**GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Infrastructure-* Satisfy current and future infrastructure needs

*Communication-* To engage, inform and educate public and staff

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Community Character-* Promote desirable growth with a hometown atmosphere

*Safety*- Ensure the continuous safety of citizens and visitors

*Mobility*- Provide safe, efficient and accessible means for mobility

*Opportunity*- Promote an environment that encourages economic and educational opportunity

*Play*- Expand recreational and entertainment activities within the City

*Community Culture*- Develop a specific identity for Crestview

### **FINANCIAL IMPACT**

Auditing fees are included in the budget of the General and Administrative Division of the General Fund.

### **RECOMMENDED ACTION**

Staff requests a motion to accept the recommendation of the auditor selection committee and engage Purvis Gray, CPA's to conduct the City's audited financial statements for the fiscal year ending September 30, 2021 as well as the two subsequent fiscal years.

### **Attachments**

1. Warren Averett's Proposal to Serve the City of Crestview
2. City of Crestview - Independent Auditing Services
3. RFP Auditing Services
4. Scoring Sheets

PROPOSAL

# Helping Business Leaders Thrive

# Proposal to Serve



## RFP for Independent Auditing Services January 6, 2022

### Proposer

Warren Averett, LLC  
45 Eglin Parkway, N.E., Suite 301  
Fort Walton Beach, FL 32548

### Submitted by

Angela D. Balent, CPA  
[Angela.Balent@warrenaverett.com](mailto:Angela.Balent@warrenaverett.com)  
850.275.1224

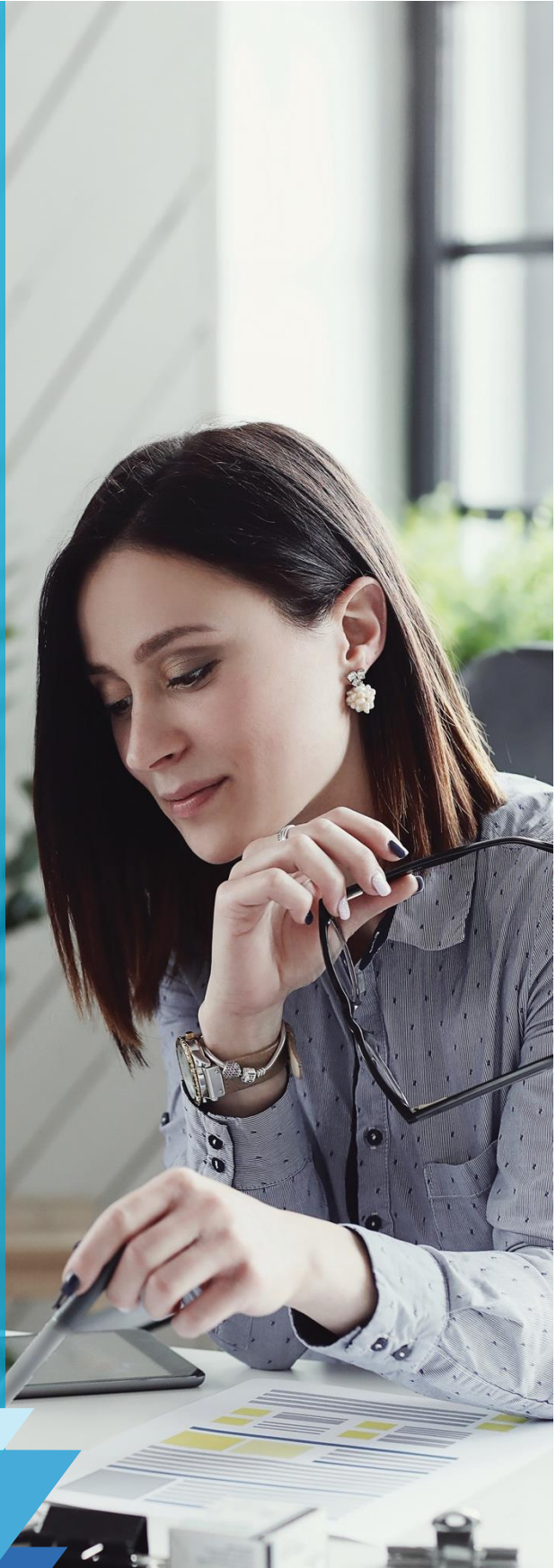
Adam Nelson, CPA  
[Adam.Nelson@warrenaverett.com](mailto:Adam.Nelson@warrenaverett.com)  
850.357.8727





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January 6, 2022

City of Crestview  
Audit Selection Committee  
198 North Wilson Street  
Crestview, FL 32536

***Solutions for your unique challenges from an experienced team***

Dear Audit Committee:

Thank you for considering Warren Averett to perform audit services for the City of Crestview (the City). We know you have options for audit services. So, why choose Warren Averett?

Warren Averett's Public Sector Practice Group is second to none and the strength, size and diversity of the Firm allows us to serve your needs beyond just audit services. We have national firm resources but will always serve our clients with intense client focus rooted in a strong local presence. Our **local Gulf Coast offices' experience** in auditing units of government is unsurpassed.

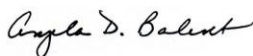
We aim to establish **long-term relationships** and become an extension of your team. We stand ready to assist with extensive experience in auditing Florida counties, municipalities and special districts. This experience ensures we provide the City with the highest level of both audit quality and client service.

We aim to serve as your partner not just during your audit, but throughout the entire year. We stand ready to provide timely advice: we respond to every client with a sense of urgency and commit to returning phone calls and emails within a 24-hour timeframe. We offer the public sector community free access to continuing education throughout the year. In addition, we provide newsletters with trending topics, as we strive to keep our clients and team members informed of changes and educated on new pronouncements impacting the sector.

At the end of the day, Warren Averett exists to help our clients thrive. We are a resource to help the City **accomplish your most important goals**, today and in the future. In learning about our CPA firm, we hope your main takeaway isn't about us, who we are or what we do—but how we can help you thrive.

The City would be a valuable client of our Firm, and we appreciate this opportunity. Please feel free to contact us with any questions.

Sincerely,



Angela D. Balent, CPA



J. Adam Nelson, CPA

# Information To Be Included in the Proposal

## 3. License to Practice in Florida

Warren Averett is properly licensed and registered for practice as Certified Public Accountants in the State of Florida.

## 4. Independence Statement

Warren Averett is independent of the City of Crestview and its management as defined by generally accepted auditing standards and Governmental Auditing Standards. Annually, Warren Averett requires all Members and client service professionals to confirm in writing that they have no relationships or holdings that would impair our independence regarding our clients. Our independence policies are routinely monitored by the Quality Control Member to ensure continued compliance.

Warren Averett has not subcontracted with the City in the past five years for professional services. We understand if selected to perform auditing services that written notice of any professional relationships entered into during the period of the audit agreement are to be provided to the City.

## 5. Understanding of Work

We have read and understand the scope of services in the City's Request for Proposal. The following deliverables will be provided for the years ending September 30, 2021, 2022 and 2023:

- Audits and opinions on the basic financial statements of the City of Crestview, Florida and its two blended component units, the Community Redevelopment Agency (CRA) and Crestview Unlimited, Inc. The audit report will include all necessary financial information and disclosures for the City's two defined benefit pension plans (General Employees Retirement Plan and Police and Firefighter's Retirement Plan);
- A separate stand-alone audit report of the City's Community Redevelopment Agency (CRA) as required by Florida Statute; and
- Based on information provided by the City it is our understanding that separate stand alone reports for the City's two defined benefit pension plans are not required deliverables for the service period.

The audits will be in accordance with the Rules of the Auditor General, Chapter 10.550; the Federal and Florida Single Audit Acts and OMB Circular A-133 (if applicable); Section 11.45 of the Florida Statutes; Regulations of the State Department of Banking and Finance; Government Auditing Standards issued by the Comptroller General of the United States; and the AICPA Auditing Standards. We commit that we will complete and submit the audit(s) and other requested reports within statutory time requirements.

We believe in working collaboratively with our clients, therefore, we will work with the City to prepare a calendar to address the items established in Sections II, III and IV of this request for proposal. We understand that timely completion of the audit is important to you and can commit to your requested June 30 deadline. On an ongoing basis, we will work with the City to develop an appropriate timeline. We will provide assistance with the preparation of the City's annual report and assistance with implementation of new government financial reporting standards. We understand that if debt is issued by the City that we may be required to furnish comfort letters at no additional cost. We also confirm that we will make an immediate written report of any and all irregularities and illegal acts to Gina Toussaint, Finance Director.

## 6. A Statement As To Whether the Firm is Local, Regional or National

Warren Averett is a regional CPA and business advisory firm, but we pride ourselves on having national talent rooted in a local presence. The following Warren Averett Difference section explains why we are the best choice for the City.

### THE WARREN AVERETT DIFFERENCE

Warren Averett's growth has exceeded many other firms' solely because we put our clients' needs first. We strive to create a superior experience for every interaction you have with our Firm. Because of our flexibility, commitment to our clients, community involvement and readily available resources, Warren Averett is different than other firms.

| OTHER FIRMS           | THE WARREN AVERETT DIFFERENCE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>National Firms</b> | <ul style="list-style-type: none"><li>• There is no red tape. We do not have to consult a national office to approve solutions for complicated issues. Our local team is equipped to handle and focus on your goals to achieve success.</li><li>• We provide engagement team continuity. We believe in being a part of your team.</li><li>• We understand you are a unique organization and do not need a cookie-cutter approach. We commit to providing you with tailored service and problem-solving while accommodating your organizational needs.</li><li>• We offer high Member/Manager involvement.</li><li>• We are committed to the success of our local community.</li></ul> |
| <b>Regional Firms</b> | <ul style="list-style-type: none"><li>• We have a depth of local industry expertise. Many of our professionals have dedicated their entire careers to learning and serving a particular industry.</li><li>• Our affiliation with the BDO Alliance USA gives us access to continuous industry educational training, as well as a sounding board of national industry professionals. The City would enjoy the benefits of this alliance (if needed), having access to the strength and resources of a national firm while receiving the service and local roots of a regional firm.</li></ul>                                                                                           |
| <b>Local Firms</b>    | <ul style="list-style-type: none"><li>• Our Firm has bench strength.</li><li>• We offer more expertise and sophisticated solutions than a local firm, without being so large that we lose focus on you.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>All Firms</b>      | <ul style="list-style-type: none"><li>• Our engagement leadership is highly experienced.</li><li>• With our high-tech advancements, we are able to provide your organization with the best talent for your needs from across our full footprint.</li><li>• We offer value-added practices and services to our clients at no additional cost (including educational opportunities and industry-specific communications).</li></ul>                                                                                                                                                                                                                                                     |

## 7. Office Location

The City audit will be managed from the Fort Walton Beach office, located at 45 Eglin Parkway, N.E., Suite 301, Fort Walton Beach, Florida. Staffing resources will be provided from the Gulf Coast offices of Warren Averett. The team is well-trained in the auditing of Florida governmental entities and those with unique federal and state audit requirements. Two Members, one Manager, one Senior Associate and two Associates from our Fort Walton Beach office will be assigned to work on the audit.

## 8. Staff Assigned to the Audit



### **Angela Balent, CPA | Engagement Quality Control Member**

Angela has more than 29 years of experience in public accounting and specializes in audit and attest services. She has extensive experience with the governmental and nonprofit industries, Common Interest Realty Associations and construction and government contractors.

**Government Experience:** Okaloosa County, City of Fort Walton Beach, City of Milton, City of Niceville, City of Pensacola, City of Valparaiso, Town of Century, Town of Cinco Bayou, Town of Shalimar, Gulf Consortium



### **Adam Nelson, CPA | Engagement Member**

Adam Nelson is a Member in the Firm's Audit Division. He has more than 18 years of public accounting experience. Adam began his auditing career by developing a specialty for auditing entities subject to federal and state Single Audit requirements. Adam has extensive experience serving counties, municipalities, quasi-governments and nonprofit organizations.

**Government Experience:** Okaloosa County, City of Fort Walton Beach, City of Freeport, City of DeFuniak Springs, City of Mary Esther, City of Milton, City of Niceville, City of Pensacola, Town of Cinco Bayou, Town of Shalimar, Gulf Consortium, Okaloosa Gas District, South Walton Fire District



### **Joel Bradley, CPA | Engagement Manager**

Joel Bradley is a Manager in the Firm's Audit Division. He has more than seven years of public accounting experience.

**Government Experience:** City of Fort Walton Beach, City of Niceville, City of Valparaiso, Town of Shalimar, Okaloosa Gas District, South Walton Fire District, Blackman Fire District



### **Destiny Lodge, CPA | Engagement In-Charge**

Destiny Lodge is a Senior Associate in the Firm's Audit Division. She has more than two years of public accounting experience.

**Government Experience:** Okaloosa County, Escambia County, City of Pensacola, City of Fort Walton Beach, Mid-Bay Bridge Authority, Okaloosa County Tax Collector, Escambia County Tax Collector, Santa Rosa County Tax Collector, Escambia County Property Appraiser, Santa Rosa County Property Appraiser





**Tammy McGaughy, CPA/ABV, CFF, CFE | Technical Expert**

Tammy McGaughy will serve as a Technical Expert available to the team should an issue arise. Tammy is Certified in Financial Forensics and is a Certified Fraud Examiner and she is responsible for incorporating elements of change in our audit approach each year. Tammy is equally qualified in the governmental accounting sector as she is the Engagement Member for the City of Niceville and the City of Mary Esther.

**Government Experience:** City of Mary Esther, City of Niceville, City of Milton, City of Fort Walton Beach, Okaloosa County



**Kevin Bowyer, CPA.CITP, CISA, CDPSE | IT Reviewer**

Kevin Bowyer serve as the IT Reviewer on the engagement responsible for evaluation of the general controls over the City's IT and business systems necessary to plan the audit in accordance with applicable auditing standards. He is a certified information technology professional and a certified information systems auditor, as well as a certified data privacy solutions engineer. Kevin is a member of the Security, Risk and Controls Practice for the Firm. Kevin will perform procedures to understand how the technology is impacting the City's system of internal control. He will inquire, document and assess technology risks such as unauthorized changes to systems or programs, potential loss of data or inability to access data as required, risks introduced by third party service providers and cybersecurity risks to list a few. Warren Averett recognizes specialized skills are necessary to understand the design, implementation and operating effectiveness of IT controls and Kevin has the qualifications and deep experience to fulfill this role.

**Government Experience:** City of DeFuniak Springs, City of Freeport, City of Gulf Breeze, Okaloosa County, Okaloosa Gas District, South Walton Fire District, South Walton Mosquito Control District

Complete resumes can be found on the following pages.



**INTEGRITY**  
IN ALL WE DO

#### **Designations and Certifications**

Certified Public Accountant (FL)

#### **Governmental Auditing Experience**

Okaloosa County, Florida  
Escambia County, Florida  
Santa Rosa County, Florida  
City of Fort Walton Beach, Florida  
City of Callaway, Florida  
City of Milton, Florida  
Town of Century, Florida  
City of Niceville, Florida  
City of Pensacola, Florida  
City of Valparaiso, Florida  
Town of Shalimar, Florida  
Town of Cinco Bayou, Florida  
Milton Housing Authority

#### **Education**

Bachelor of Science in Business  
Administration  
Bowling Green State University,  
Bowling Green, OH

## **ANGELA D. BALENT, CPA**

### **Engagement Quality Control Member**

D 850.275.1224 | F 850.664.2562

45 Eglin Parkway, N.E., Suite 301| Fort Walton Beach, FL 32548

[Angela.Balent@warrenaverett.com](mailto:Angela.Balent@warrenaverett.com)

Angela Balent joined the Firm in 1992 and is a Member in the Firm's Audit Division. She has more than 29 years of experience in public accounting and specializes in audit and attest services. She has extensive experience with the governmental and nonprofit industries, Common Interest Realty Associations and construction and governmental contractors. Angela resides in Fort Walton Beach with her husband and three children.

### **Professional Affiliations**

- Economic Development Council of Okaloosa County, Past Chairman
- Emerald Coast Chapter of the Florida Institute of Certified Public Accountants, Past President
- Government Finance Officers Association, CAFR and PAFR Special Reviewer
- Florida Government Finance Officers Association
- American Institute of Certified Public Accountants
- Florida Institute of Certified Public Accountants

### **Community Involvement**

- The Junior League of the Emerald Coast, Past President
- Coast Aquatics, Inc., Past President
- Community Associations Institute, North Gulf Coast Chapter, Past President
- 86th Fighter Weapons Squadron, Past Honorary Commander, Eglin Air Force Base

### **Relevant Continuing Professional Education**

- Governmental GAAP Update – 2021
- Accounting Forum for Public Sector – 2021
- Government Audit Planning and Update – Gulf Coast Offices – 2021
- The Most Critical Challenges in Governmental Accounting Today (CGA4) – 2021
- Accounting Trends Update – 2021
- BDO Alliance USA Conference – Assurance Practice Leaders Session – 2021
- Government Planning Approach for the Gulf Coast – 2020
- NFP Governmental and Healthcare Industry Conference – Single Audit Track – 2020
- Accounting Trends Update – 2020
- Accounting Forum for Public Sector for Educational Institutions & Other Nonprofit Organizations – 2020



## ADAM NELSON, CPA

### Audit Member

D 850.357.8727 | F 850.664.2562

45 Eglin Parkway, N.E., Suite 301 | Fort Walton Beach, FL 32548

[Adam.Nelson@warrenaverett.com](mailto:Adam.Nelson@warrenaverett.com)

Adam Nelson joined Warren Averett in 2018 and is a Member in the Firm's Audit Division. He has more than 18 years of public accounting experience. He began his auditing career by developing a specialty for auditing entities subject to federal and state Single Audit requirements. Adam has extensive experience serving counties, municipalities, quasi-governments and nonprofit organizations. His primary responsibilities include executing and managing financial statement audits as a trusted client advisor, providing insight on industry trends, identifying client issues and proactively communicating plausible solutions to clients beyond the debits and credits. In addition, he assists clients with internal control reviews, debt offerings as well as other accounting matters and business concerns. Adam resides in Fort Walton Beach with his wife and three dogs.

### SOLID RELATIONSHIPS

#### Designations and Certifications

Certified Public Accountant (FL)

#### Governmental Auditing Experience

Okaloosa County, Florida  
City of Fort Walton Beach, Florida  
City of Freeport, Florida  
City of DeFuniak Springs, Florida  
City of Mary Esther, Florida  
City of Milton, Florida  
City of Niceville, Florida  
City of Pensacola, Florida  
Town of Cinco Bayou, Florida  
Town of Shalimar, Florida  
Okaloosa Gas District  
South Walton Fire District

#### Education

Bachelor of Science, Accounting  
Florida Atlantic University  
Boca Raton, Florida

Bachelor of Business Administration, Finance  
Florida Atlantic University  
Boca Raton, Florida

#### Professional Affiliations

- American Institute of Certified Public Accountants
- Florida Society of Certified Public Accountants
- Government Finance Officers Association
- Certificate of Achievement Program Special Review Committee for the GFOA
- Treasurer, Emerald Coast Science Center

#### Relevant Continuing Professional Education

- Government Audit Planning and Update – Gulf Coast Offices – 2021
- CARES Act Training for Auditors – 2021
- BDO Alliance USA Conference – GASB Update and Practice Issues – 2021
- BDO Alliance USA Conference – Single Audit Surprises and Other Matters – 2021
- BDO Alliance USA Conference – Yellow Book Update and Practice Issues – 2021
- Government Planning Approach for the Gulf Coast, Instructor – 2020
- Accounting Forum for Public Sector for Education Institutions & Other Nonprofit Organizations, Instructor – 2020
- Accounting Trends Update – 2020
- Nonprofit & Education, Governmental and Healthcare Industry Conference – General Session – 2020
- BDO USA Alliance Conference – 2020





## JOEL BRADLEY, CPA

### Audit Manager

D 850.275.1256 | F 850.664.2562

45 Eglin Parkway, N.E., Suite 301 | Fort Walton Beach, FL 32548

[Joel.Bradley@warrenaverett.com](mailto:Joel.Bradley@warrenaverett.com)

Joel Bradley joined Warren Averett in August 2016 as a Manager in the Firm's Audit Division. Joel has over seven years of experience in the field of public accounting and specializes in compliance, governmental and nonprofits, as well as condominium association audits. Joel takes an active interest in helping his clients achieve their goals. Joel lives in Fort Walton Beach.

### Professional Affiliations

- American Institute of Certified Public Accountants

### Community Involvement

- Greater Fort Walton Beach Chamber of Commerce

### Relevant Continuing Professional Education

- Government Audit Planning and Update – Gulf Coast Offices – 2021
- CARES Act Training for Auditors – 2021
- Revised Yellow Book – What You Need To Know – 2020
- BISK Governmental-Nonprofit Accounting Report Sessions – 2020
- Journal Entry Testing and Audit Data Analytics – 2020
- Government Planning Approach for the Gulf Coast – 2020
- Nonprofit & Education, Governmental and Healthcare Industry Conference – Single Audit & GASB Tracks – 2020
- Accounting Trends Update – 2020
- Accounting Forum for Public Sector for Education Institutions & Other Nonprofit Organizations – 2020
- Government-wide Financial Statements and Conversions/Consolidations in the Field of Accounting – 2020

## ENTREPRENEURSHIP

### Designations and Certifications

Certified Public Accountant (IL)

### Governmental Auditing Experience

[City of Fort Walton Beach, Florida](#)

[City of Niceville, Florida](#)

[City of Valparaiso, Florida](#)

[Town of Shalimar, Florida](#)

[Okaloosa Gas District](#)

[South Walton Fire District](#)

[Blackman Fire District](#)

### Education

Bachelor of Science in Accountancy

University of Illinois at Urbana-Champaign  
Urbana, IL

Master of Accounting Science

University of Illinois at Urbana-Champaign  
Urbana, IL



## DESTINY LODGE, CPA

### Audit Senior Associate

D 850.444.7221 | F 850.664.2562

45 Eglin Parkway, N.E., Suite 301 | Fort Walton Beach, FL 32548

[Destiny.Lodge@warrenaverett.com](mailto:Destiny.Lodge@warrenaverett.com)

Destiny Lodge is a Senior Associate in the Firm's Audit Division. Her primary responsibilities include performing audits of financial statements in accordance with GAAP standards, providing support to management by mentoring and training audit staff and preparing financial statements and required disclosures for compilation and review engagements. Destiny resides in Mary Esther, Florida with her husband and her rescue-dog, Hartley.

### Professional Affiliations

- American Institute of Certified Public Accountants
- Florida Society of Certified Public Accountants

### Community Involvement

- Liberty Church's "Next Generation" Team, Group Leader
- Greater Fort Walton Beach Chamber of Commerce

### Relevant Continuing Professional Education

- Government Reporting Refresher (FWB) – 2021
- Lessons Learned from Auditing During a Pandemic – 2021
- IT General Controls Refresher for Auditors – 2021
- CARES Act Training for Auditors – 2021
- Audit Level 3 Technical Training – 2021
- Overview of Single Audit – 2021
- BDO Alliance USA Conference – GASB Update and Practice Issues – 2021
- BISK Governmental-Nonprofit Accounting Report Sessions – 2020
- Journal Entry Testing and Audit Data Analytics – 2020
- Government Planning Approach for the Gulf Coast – 2020
- Accounting Forum for Public Sector for Education Institutions & Other Nonprofit Organizations – 2020

## SHARING OUR SUCCESS

### Designations and Certifications

Certified Public Accountant (FL)

### Governmental Auditing Experience

[Okaloosa County, Florida](#)

[Escambia County, Florida](#)

[City of Pensacola, Florida](#)

[City of Fort Walton Beach, Florida](#)

[Mid-Bay Bridge Authority](#)

[Okaloosa County Tax Collector](#)

[Escambia County Tax Collector](#)

[Santa Rosa County Tax Collector](#)

[Escambia County Property Appraiser](#)

[Santa Rosa County Property Appraiser](#)

### Education

Bachelor of Science in Business

Administration – Accounting

Troy University, Troy, AL

Master of Accountancy

Troy University, Troy, AL



## TAMMY S. MCGAUGHY, CPA/ABV, CFF, CFE

### Engagement Technical Expert, Audit Member

D 850.275.1227 | F 850.664.2562

45 Eglin Parkway, N.E., Suite 301 | Fort Walton Beach, FL 32548

[Tammy.McGaughy@warrenaverett.com](mailto:Tammy.McGaughy@warrenaverett.com)

Tammy McGaughy joined the Firm in 1996 and is a Member in the Firm's Audit Division and its Corporate Advisory Services Group. She has 29 years of experience in the field of public accounting and specializes in compliance and internal audits, governmental and nonprofits, forensic audits and business valuations. Tammy lives in Fort Walton Beach, keeps busy with her children's many activities, and also enjoys spending the mornings walking her dogs.

#### Professional Affiliations/Recognitions

- Association of Certified Fraud Examiners
- Florida Government Finance Officers Association
- Florida Institute of Certified Public Accountants
- American Institute of Certified Public Accountants

#### Community Involvement

- Greater Fort Walton Beach Chamber of Commerce, Past-Chair, Treasurer
- Okaloosa Community Development Corp, Executive Board
- Florida Institute of Certified Public Accountants, Past-President
- FWB Dog Daze Festival, Chair of Chamber

#### Relevant Continuing Professional Education

- Accounting Forum for Public Sector – 2021
- Government Audit Planning and Update – Gulf Coast Offices – 2021
- Government Investigations 2021: Investigations Arising from Data Breach and Privacy Concerns and Parallel Proceedings – 2021
- BISK Governmental-Nonprofit Accounting Report Sessions – 2020
- Journal Entry Testing and Audit Data Analytics – 2020
- Government Planning Approach for the Gulf Coast – 2020
- Accounting Trends Update – 2020
- Accounting Forum for Public Sector for Educational Institutions & Other Nonprofit Organizations – 2020
- Paycheck Protection Program Webinar – 2020
- Fraud and Forensics, Instructor – 2020

## PASSION TO WIN

#### Designations and Certifications

Certified Public Accountant (FL)  
Certified Fraud Examiner  
Certified in Financial Forensics  
Accredited in Business Valuations

#### Governmental Auditing Experience

Okaloosa County, Florida  
City of Fort Walton Beach, Florida  
City of Mary Esther, Florida  
City of Milton, Florida  
City of Niceville, Florida

#### Education

Bachelor of Science in Accounting  
The Ohio State University, Columbus, OH



## KEVIN D. BOWYER, CPA.CITP, CISA, CDPSE

**IT Reviewer, Audit Member**

D 850.337.2422 | F 850.837.4583

36474C Emerald Coast Pkwy., Suite 3301 | Destin, FL 32541

[Kevin.Bowyer@warrenaverett.com](mailto:Kevin.Bowyer@warrenaverett.com)

Kevin Bowyer joined the Firm in 1990, is a Member in the Firm's Audit Division and serves as the Managing Member of the Destin office. Kevin has over 30 years of experience in public accounting and specializes in planning, supervising and conducting audits of companies in a variety of industries, including construction, government, hospitality, real estate, professional services, nonprofits and manufacturing and distribution. He also has extensive knowledge in consulting and performing audits in the areas of IT Risk Management, System and Organization Control engagements and internal control evaluations, as well as consulting, compliance services and tax planning and preparation services for condominium and homeowners' associations. Kevin is also a member of the Risk and Controls Division of Corporate Advisory Services. Kevin lives in Destin with his wife and three children.

### ENTREPRENEURSHIP

#### Designations and Certifications

Certified Public Accountant (FL)  
Certified Information Technology Professional  
Certified Information Systems Auditor  
Certified Data Privacy Solutions Engineer

#### Governmental Auditing Experience

[Okaloosa County, Florida](#)  
[City of DeFuniak Springs, Florida](#)  
[City of Freeport, Florida](#)  
[City of Gulf Breeze, Florida](#)  
[Okaloosa Gas District](#)  
[South Walton Fire District](#)  
[South Walton Mosquito Control District](#)

#### Education

Bachelor of Arts in Accounting  
University of West Florida, Pensacola, FL

#### Professional Affiliations

- Information Systems Audit and Control Association
- Government Finance Officers Association
- Florida Government Finance Officers Association
- Florida Institute of Certified Public Accountants, Past Board of Governors
- American Institute of Certified Public Accountants, SOC Peer Review Specialist

#### Community Involvement

- Destin Rotary Club, Past President, Chairman of Scholarship Foundation
- Destin Area Chamber of Commerce, Past Chairman
- Florida Chamber of Commerce, Board of Directors and Finance Committee

#### Relevant Continuing Professional Education

- BISK Governmental-Nonprofit Accounting Report Sessions – 2021
- How to 10X Your SOC and Prepare for the Next Security Decade – 2021
- Accounting Forum for Public Sector – 2021
- 22<sup>nd</sup> Annual Institute on Privacy and Cybersecurity Law – 2021
- ISACA Virtual Summit: Cybersecurity for the Cloud & State of Cybersecurity – 2020
- Accounting Forum for Public Sector for Education Institutions & Other Nonprofit Organizations – 2020 & 2019 (Instructor)
- Cyber Resiliency and Breach Reporting – 2020

## 9. Experience in Preparing Governmental Financial Statements

The Fort Walton Beach office of Warren Averett, LLC has extensive experience in preparing governmental financial statements as an extension of our audit services. The following engagements performed out of the Fort Walton Beach office include both auditing the entity as well as preparation of the financial statements as a non-attest service:

- City of Fort Walton Beach, Florida\*
- City of Mary Esther, Florida\*
- City of Niceville, Florida\*
- City of Valparaiso, Florida
- Town of Cinco Bayou, Florida
- Town of Shalimar, Florida
- City of DeFuniak Springs, Florida
- City of Freeport, Florida

\*Awarded a GFOA Certificate of Achievement in Financial Reporting.

Adam Nelson, the primary Engagement Member assigned to the City, leads services to the City of Fort Walton Beach, DeFuniak Springs and Freeport, Florida.

Our expertise in financial reporting is a result of the size and expertise of our Government Audit staff and additional information follows on our investment in this industry space.

### Size and Expertise of Government Audit Staff

For more than 50 years, Warren Averett has provided auditing and consulting services for units of government. Warren Averett has a specialized public sector client service team to ensure Firm-wide our governmental, higher education and nonprofit clients are served by Members, Senior Managers and team members who specialize in government accounting and auditing. The governmental engagement team selected to serve the City maintains their technical knowledge of industry best practices through specific CPE for the governmental field and on-the-job training. Our public sector industry segment generated \$14.2 million of revenues in 2020, making it one of the largest specialized client service teams in the Firm.

### GOVERNMENTAL EXPERIENCE AT A GLANCE

60+ DEDICATED GOVERNMENTAL AUDITORS FIRM-WIDE

100% CAFR SUCCESS RATE

SINGLE AUDITS PERFORMED: 150+ Governmental Audit  
Quality Center Member





Warren Averett has been a trusted advisor and external auditor for state and local governmental entities for over 50 years. We are one of the largest providers of audit, accounting and consulting services for governmental entities and nonprofit organizations in the Southeast. Our client base includes counties, cities, water and sewer systems, special districts and other agencies that receive state or federal funding whose audits fall under Government Auditing Standards.

From revenue shortfalls and tax revenue fluctuations to rising healthcare costs and managing deficit spending, many governmental entities are facing mounting financial challenges. Warren Averett has the specialized knowledge to help fill this void and meet the needs of our government clients. We have an established Public Sector Practice Group comprised of more than 60 experienced Members and Managers whose primary focus is on this specific industry.

Our memberships and active participation in the following professional groups solidify our partnerships with governmental entities and ensure that the City will be served by individuals who are extremely knowledgeable in governmental accounting, financial reporting, auditing and grant compliance matters.

- Government Finance Officers Association (GFOA)
- Florida Government Finance Officers Association (FGFOA)
- Government Finance Officers Association of Alabama (GFOAA)
- Association of Government Accountants (AGA)
- American Institute of Certified Public Accountants Governmental Audit Quality Center

Warren Averett takes pride to be a thought leader for the profession and our team members are standing speakers for the Florida and Alabama Government Finance Officers Associations (FGFOA/GFOAA) both locally and at the state level. Members also serve on the Board of Governors for our state CPA societies in both Florida and Alabama. Our Members are frequently quoted in local and national publications and recognized as business experts and community leaders in all of our markets.

Our Firm is also a member of the AICPA Governmental Audit Quality Center. This firm-based voluntary membership center is designed to help with the challenges of performing quality audits in this unique and complex area. Warren Averett has more than 60 experienced Members and Managers whose primary focus is serving units of government.

Our government audit staff has extensive experience in the federal and the State of Florida Single Audit. The federal and State of Florida Act requirements are very comprehensive and require the audits be conducted in accordance with three sets of auditing standards or requirements acceptable to the federal or state grantor agencies. Our governmental audit staff attends specific training on conducting federal and state Single Audits and has extensive experience auditing multiple federal and state award programs.

### **Experience with Annual Comprehensive Financial Reports (Formerly CAFR)**

Many of our government clients annually obtain the Certificate of Achievement for Excellence in Financial Reporting. The government audit staff assigned to your engagement has over 50 years of combined experience in reviewing governmental financial statements against the GFOA's ACFR (formerly CAFR) criteria. We know what to look out for on behalf of our clients looking to seek that certificate. Both Angela Balent and Adam Nelson volunteer with the GFOA as Special Reviewers for the Certificate of Achievement Program, which means they review governmental financial reports from across the county and determine whether they meet the ACFR requirements. In the RFP, the City indicated they sought to obtain the Certificate of Achievement for Excellence in Financial Reporting and Warren Averett is second to none in this area.

**60+**  
DEDICATED  
GOVERNMENTAL  
AUDITORS  
FIRMWIDE

---

SERVING MORE  
THAN  
**100**

---

GOVERNMENTAL  
CLIENTS  
THROUGHOUT THE  
SOUTHEAST

## 10. Active Florida Governmental Clients



### Florida Governmental Clients

- Okaloosa County, Florida
- Escambia County, Florida
- Santa Rosa County, Florida
- Okaloosa County Tax Collector
- Escambia County Tax Collector
- Santa Rosa County Tax Collector
- Okaloosa County Property Appraiser
- Escambia County Property Appraiser
- Santa Rosa County Property Appraiser
- Okaloosa County Sheriff's Office
- Escambia County Sheriff's Office
- Santa Rosa County Sheriff
- Okaloosa County Supervisor of Elections
- Escambia County Supervisor of Elections
- Santa Rosa County Supervisor of Elections
- Okaloosa County Clerk of Courts
- Escambia County Clerk of Courts
- Santa Rosa County Clerk of Court
- City of DeFuniak Springs, Florida
- City of Fort Walton Beach, Florida
- City of Freeport, Florida
- City of Mary Esther, Florida
- City of Milton, Florida
- City of Niceville, Florida
- City of Pensacola, Florida
- City of Valparaiso, Florida
- Downtown Pensacola Improvement Board
- Town of Century, Florida
- Town of Cinco Bayou, Florida
- Town of Ponce de Leon, Florida
- Town of Shalimar, Florida
- Blackman Fire District, Florida
- CareerSource Escarosa
- The Gulf Consortium
- Midway Fire District
- Mid-Bay Bridge Authority
- Niceville, Valparaiso, Okaloosa County Regional Sewer Board
- Okaloosa Gas District

### Other Firm Governmental Clients

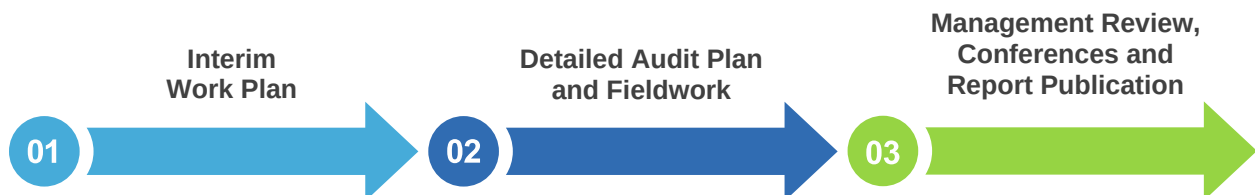
- Alabama Housing Finance Authority, a component unit of the State of Alabama
- Alabama State Bar Foundation
- Alabama State Port Authority
- Alabama State University, a component unit of the State of Alabama
- City of Anniston, Alabama
- City of Ashland, Alabama
- City of Cullman, Alabama
- City of Decatur, Alabama
- City of Dunwoody, Georgia
- City of Evergreen, Alabama
- City of Fairhope, Alabama
- City of Foley, Alabama
- City of Goodwater, Alabama
- City of Huntsville, Alabama
- City of Madison, Alabama
- City of Montgomery, Alabama
- City of Piedmont, Alabama
- City of Selma, Alabama
- City of Sylacauga, Alabama
- City of Talladega, Alabama
- City of Temple, Georgia
- City of Tuscaloosa, Alabama
- Cullman-Jefferson Counties Gas District
- Georgia Development Authority
- Georgia General Assembly
- Jefferson County, Alabama
- Mobile Airport Authority
- Spanish Fort Water System
- Town of Eclectic, Alabama
- Town of Loxley, Alabama
- West Autauga Water Authority

# 11. AUDIT APPROACH

## HIGH QUALITY. RISK FOCUSED.

### 11A. Proposed segmentation of the engagement.

With audit procedures that are tailored to your organization and responsive to grow and change as your business does, Warren Averett offers truly personalized, risk-focused audit services unlike any other. We're also government industry and Single Audit experts, able to leverage insight into your operational world alongside your financial one.



### PHASE 1: PLANNING AND INTERIM WORK

- 1 Starting strong – with personalized planning sessions and deep research into your organization – means we understand the details of the City before we begin to make risk assessments. In fact, **we estimate that 20 to 25 percent of the audit can be completed at interim.**
- 2 We'll start with **internal planning sessions** to make applicable fraud inquiries and discuss significant events and transactions. This includes reviewing Board meeting minutes and internal financial statements including budget to actual comparisons.
- 3 Next, we'll conduct interviews to document our understanding of your organization's **internal controls** with regard to financial statements and compliance.
- 4 We'll then evaluate **audit risk** associated with your operating environment and identify any instances in which you could be susceptible to material misstatement or fraud (and how you'll deal with them).
- 5 Finally, we'll **establish materiality** with a proprietary approach that focuses on both quantitative and qualitative data and a look back at historic errors.

### PHASE 2: DETAILED AUDIT PLAN AND FIELDWORK

Next, we'll get to work collecting and organizing all of your organization's financial information in order to execute our detailed audit plan and fieldwork. This work could include (but won't be limited to):



**Substantive procedures** to include both detail testing and analytical procedures. Detail testing includes vouching to source documents based on sampling or scoping. Analytical procedures include predictive tests and trend analysis;



**Third-party confirmations** to ensure accuracy of cash, investments, receivables, debt and other balances;



Although **testing the operating effectiveness of internal controls** in a financial statement audit is not required, with the current use of sophisticated and complicated computer systems and systemic controls, testing controls should occur to some extent in nearly every audit engagement;





**Reporting and disclosures** to get a handle on proposed changes to your accounting processes. These considerations include opinion units, major funds, compliance requirements and accounting and reporting alternatives. The accounting standards of the GASB permit local governments to select from a number of accounting and financial reporting alternatives. Our auditors specialized in governmental accounting and financial reporting can help the City navigate the complexities of financial reporting; and



**Data analysis abnormality identification**, done with specialized software designed to make sorting, filtering and analyzing large amounts of transactions quick and accurate – and inconsistencies easy to pinpoint and address. We employ data analysis to perform a number of audit tests.

### PHASE 3: MANAGEMENT REVIEW, CONFERENCE AND REPORT PUBLICATION

Near completion of fieldwork, the necessary upward review, including Member and Manager level reviews, will be performed promptly. This will allow for resolution of any review questions and permit a more timely completion of the audit.

We'll report back to you and check in with management, and if desired, governance, to address preliminary audit adjustments and findings before printing them in the management letter. Finally, we'll release a final report on time, based on your deadline.

#### Use of Technology in the Audit

As technology has enhanced the work of performing audits, Warren Averett has invested in creating tools, fostering education and empowering leaders to maximize the value of audit services by automating time-consuming tasks. Today, we are more efficient and effective than ever, thanks to advanced data analytics, automation, augmented intelligence and more.

##### Our Resources:

- Warren Averett Connect
- Accounting Blockchain Coalition (ABC)
- Director of Innovation
- Data Analysis Group
- Citizen Data Analysis
- Best Firm in Technology Award

##### Data Analytics Tools:

- Alteryx Designer
- Caseware IDEA
- Wolters Kluwer Teammate Analytics
- Altair Monarch

#### 11B. Level of staff and number of hours to be assigned to each proposed segment of the engagement.

Our audit approach encompasses a high level of Member and Manager involvement due to the complexity of the governmental industry space.

| Segments                                    | Member    | Manager    | Supervisory Staff | Staff      | Total Hours |
|---------------------------------------------|-----------|------------|-------------------|------------|-------------|
| Planning and interim work (phase 1)         | 32        | 60         | 18                | 10         | 120         |
| Year-end fieldwork (phase 2)                | 15        | 40         | 70                | 112        | 237         |
| Review, reporting and conferences (phase 3) | 45        | 50         | 25                | 0          | 120         |
| <b>Total</b>                                | <b>92</b> | <b>150</b> | <b>113</b>        | <b>122</b> | <b>477</b>  |

### **11C. Sample size and extent to which statistical sampling is to be used in the engagement.**

In a governmental engagement, distinct types of audit procedures may involve the use of audit sampling as follows:

- Substantive tests of details of account balances
- Substantive tests of details of transactions
- Tests of controls, directed toward operating effectiveness or toward compliance
- Tests of compliance with laws and regulations

The two possible approaches to audit sampling are non-statistical and statistical. Either approach may be used to apply whatever tests of details the auditors deem necessary in the circumstances. Typically, we utilize non-statistical sampling for substantive tests. Tests of controls and compliance are typically performed using a statistical sample. Sample sizes are based on the tolerable rate, the risk of assessing control risk too low (risk of over-reliance) and the expected rate of deviations from prescribed controls.

### **11D. Type and extent of analytical procedures to be used in the engagement.**

Warren Averett uses analytical procedures in several areas of our governmental audits.

- Preliminary (planning) analytical procedures – These procedures are used to enhance our understanding of the City's operations and assist in assessing areas of specific risk of misstatement by identifying unusual relationships among account balances or the absence of expected relationships.
- Substantive analytical procedures – These procedures are used to obtain audit evidence about potential misstatements. The primary distinguishing feature of substantive analytical procedures is the auditors' development of an expectation or prediction of what a recorded amount, or ratio based on recorded amounts, should be. Analytical procedures are used in almost all areas of the audit, but some of the areas where we rely more on substantive analytical procedures include but are not limited to: grants revenue and receivable, enterprise funds revenue and receivable, certain accrued liabilities, pension plan reporting, OPEB reporting, certain expenses related to capital assets and debt and investment income.
- Overall review of analytical procedures – These procedures are used in the final review stage of the audit.

### **11E. Approach to be taken to gain and document an understanding of the internal control structure.**

The internal control structure of the City, and its operating effectiveness, is the responsibility of management throughout the organization. We will gain an understanding of the internal control system as follows:

- We will conduct interviews with management to document not only the flow of transactions, but also specific key controls which serve to prevent errors and fraud. We will document our understanding relative to both controls over financial reporting and controls over federal and state programs.
- Management's written policies will be requested, analyzed and compared against the completed questionnaires.

- Detailed walkthroughs, consisting of procedures such as inspections, re-performance, inquiry and observations, will be performed on all key controls and significant transaction cycles.
- Tests of controls will most likely be performed based on the outcome of our understandings and walkthroughs, which ultimately may be used to reduce the amount of substantive test work required to be performed if controls are deemed to be effective at reducing the risk of misstatement to tolerable levels.

#### **11F. Approach to be taken in determining laws and regulations that will be subject to audit test work.**

The City's compliance with governing laws, regulations, rules and other finance-related legal requirements is the responsibility of the City's management. As part of our audit, we will perform tests of compliance with certain provisions of laws, regulations, rules and other finance-related legal requirements. It is important to note that the independent auditors' role in compliance auditing is one of the most significant environmental differences between governmental and private sector auditing. Our approach includes the use of the Florida Institute of Certified Public Accountants' publication, Compliance Auditing in Florida. The practice aid provides listing and examples of statutory and other legal references pertinent to audits of Florida local government entities. Our approach will also include the following:

- Conducting interviews with members of management to determine their knowledge of laws and regulations that could have a direct and material effect on the financial audit and Single Audit;
- Reading minutes of the City Board meetings for laws and regulations which could have a direct and material effect on the City;
- Reviewing of OMB and Florida's Division of Accounting and Auditing websites for changes occurring with compliance supplement (for major programs and/or projects); and
- Reviewing of the Florida Auditor General's annual publication of their compliance supplement.

#### **11G. Approach to be taken in drawing audit samples for purposes of tests of compliance.**

There are several commonly utilized sampling methods, such as random selection, systematic sampling or haphazard selection. In tests of compliance, the auditors are concerned about whether or not there is evidence of compliance. The minimum sample sizes are based on the significance of the control, inherent risk of the compliance requirement and deviations expected, and such minimum sample sizes range from 25 to 60 based on the assessments of the components above. However, Warren Averett uses professional judgment to determine if larger sample sizes are warranted in order to obtain sufficient appropriate audit evidence that controls are functioning in their particular circumstances.

## 12. AUDIT FEES

---

Warren Averett is pleased to submit our proposed fees to provide the below services for the City:

| Services       | Fiscal Year Ended<br>September 30, 2021 | Fiscal Year Ending<br>September 30, 2022 | Fiscal Year Ending<br>September 30, 2023 |
|----------------|-----------------------------------------|------------------------------------------|------------------------------------------|
| Audit Services | \$75,000                                | \$76,875                                 | \$78,797                                 |

The complete fee information is located in the Schedule of Professional Fees and Expenses Form in **Appendix A**. A 2.5% increase in each fiscal year after the base year has been budgeted for cost of living and inflation. Single Audit fees have not been included in the base pricing since its unknown if such services are required.

Our fees are based on your current level of operations and assume the current level of accounting and auditing standards. Changes in legal structure, acquisitions or a change in the reporting or filing requirements could require adjustments to these fees. We will consult you regarding any proposed changes to our fees.

To gain optimum use for you of existing staff in your organization, fees are computed on the assumption that we will receive the assistance of your personnel in analyzing accounts, locating requested documents and drafting financial statements and footnote disclosures. If extraordinary circumstances are encountered, we will consult you before performing additional procedures.

### Out-of-Pocket Expenses

Overhead charges, such as copying, computer usage, etc., are included in our professional fee rates.

### Incidental Charges

We believe in complete transparency in fees, which means we quote services based on experience and realistic expectations to avoid unexpected fees, and we will mutually agree upon a fee in advance of any work, should a change in scope or additional projects outside the scope of this proposal become necessary.

Additionally, the City will not receive a bill for every quick phone call or email. Communications that result in a significant investment of time or the production of some type of deliverable may be included on your bill. Services outside the scope of work may be subject to billings outside the fixed fee quote; however, if additional billings are anticipated, we will discuss with management prior to performing the work

## Appendices

Learn more about working with Warren Averett. Get to know our wide range of services and the differences that make our Firm truly stand out.

## ADDITIONAL QUALIFICATIONS

### **V.1. The firm must have license to practice in Florida**

Please reference page 4.

### **V.2. The firm must provide an affirmative statement that it is independent of the City of Crestview as defined by generally accepted auditing standards/Government Auditing Standards issued by the Comptroller General of the United States.**

Please reference page 4.

### **V.3. The firm must have been established in Florida and performed continuous CPA services for a minimum of five years.**

Warren Averett was founded in 1972 in Birmingham, Alabama, and merged with our original firm, O'Sullivan Creel, LLP, in 2012. O'Sullivan Creel, LLP had been continuously providing CPA services in the State of Florida to units of government, including several Florida cities and counties, well in excess of 40 years. O'Sullivan Creel, LLP was also established as a legal entity in the State of Florida previous to the formation of Warren Averett, LLC, which officially registered in Florida on January 5, 2012. In total, we have been performing CPA services in Florida for over 50 years.

### **V.4. The firm must be a member in good standing with the American Institute of Certified Public Accountants and the Florida Institute of Certified Public Accountants.**

Warren Averett is a member in good standing with both the AICPA and the FICPA, including membership in the AICPA's Governmental Audit Quality Center, as well as membership and active participation in the Government Finance Officers Association (GFOA) and the Florida Government Finance Officers Association (FGFOA).

### **V.5. The firm should clearly indicate its expertise. Resumes should be provided for the partner and manager who would be in charge of the audit.**

Our governmental expertise is located on pages 14-16. Resumes of our assigned personnel are on pages 8-13.

### **V.6. The individuals who will be primarily responsible for the audit must have 24 hours of governmental accounting and auditing CPE.**

We readily exceed the State of Florida and GAO's biennial CPE hour requirements through a variety of external and internal programs. Warren Averett affirms that all professional personnel have received adequate continuing professional education (CPE), as required under Government Auditing Standards, within the preceding two (2) years. Our commitment is further demonstrated in the fact that Warren Averett has a full-time Director of Professional Development to oversee our continuing education efforts.



Team member continuing professional education is directed towards developing their skills to the fullest extent possible in their respective areas of practice. Because of our size, this departmentalization ensures that well-trained full-time auditors serve our audit clients. Over two-year increments, our audit professionals receive at least 80 hours of continuing professional education that directly enhances their professional proficiency to perform audits and/or attestation engagements, as well as meet extensive Yellow Book governmental requirements.

**V.7. The firm should indicate any disciplinary actions that have been instituted or proposed against the firm during the last three years.**

We take great pride in the fact that our Firm has never had any sanctions or other disciplinary action taken relative to performance of audit work.

**V.8. The firm should describe the results of any State or Federal reviews during the past three years of the firm's governmental client audit work.**

Each year, many of our audits are subject to desk reviews by the various grantors and governmental agencies that provide funding to our clients. Those reviews have not resulted in any correspondence or letters of comment regarding non-compliance with state or federal reporting requirements.

**V.9. Ability to adequately store all working papers and reports at the auditor's expense for a minimum of three years, unless the firm is notified by the City to extend the retention period. The auditor will be required to make working papers available, upon request, to the following parties or their designees: the City, General Accounting Office, parties to an audit quality review process, and auditors of entities of which the City is a recipient of grant funds. In addition, the firm shall respond to the reasonable inquiries of successor auditors and allow successor auditors to review working papers.**

Warren Averett agrees to store workpapers and reports for the required minimum of three years, unless otherwise notified. We will make workpapers available to the parties listed above.

**Peer Review Report**

Warren Averett is respected as an industry leader in developing and adhering to quality review standards, and we have received an unqualified opinion from every independent peer review team that has visited our Firm. Our last peer review was conducted in 2019 by Henderson Hutcherson & McCullough, PLLC of Chattanooga, Tennessee. We did not receive a letter of comments.

Our peer review reports no significant weaknesses and confirms that our systems of internal quality controls provide assurance of quality audit work and assurance that our professionals take their responsibility to adhere to the profession's standards seriously. Warren Averett received the highest possible peer review rating. This quality control review also included a review of specific governmental engagements. A copy of our most recent peer report can be found on the following page.



# PEER REVIEW REPORT



## Report on the Firm's System of Quality Control

December 31, 2019

To The Partners of Warren Averett LLC and the National Peer Review Committee of the AICPA.

We have reviewed the system of quality control for the accounting and auditing practice of Warren Averett LLC (the firm) applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended July 31, 2019. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards). A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System review as described in the standards may be found at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary). The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

### Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

### Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

### Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under the Single Audit Act, audits of employee benefit plans, an audit performed under FDICIA, an audit of a broker-dealer, and examinations of service organizations [SOC 1 and SOC 2 engagements].

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

### Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Warren Averett LLC applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended July 31, 2019, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency* or *fail*. Warren Averett LLC has received a peer review rating of *pass*.

*Henderson Hutcherson  
& McCullough, PLLC*

1200 Market Street, Chattanooga, TN 37402 | T 423.756.7771 | F 423.265.8125

AN INDEPENDENT MEMBER OF THE BDO ALLIANCE USA

## Client References

Resourceful, inventive, dependable, spirited and, yes, competitive. Clients say we share many of their defining traits. We'll treat your business like our own—from the advice we give to the commitment we demonstrate and the service we deliver. We encourage you to contact the references listed below so you can hear first-hand about our Firm's qualifications and client service.

### City of Fort Walton Beach

Julio Lacayo, Finance Director  
107 Miracle Strip Parkway SW  
Fort Walton Beach, FL 32548  
850.833.9512  
jlacayo@fwb.org

### Okaloosa County

Ron Adamov, Chief Financial Officer of Clerk of  
Courts & Comptroller  
101 E. James Lee Boulevard  
Crestview, FL 32536  
850.689.5000 ext. 3431  
radamov@okaloosaclerk.com

### City of DeFuniak Springs

Debra Gibson, Finance Director  
71 US Hwy 90 W  
DeFuniak Springs, FL 32433  
850.892.8500  
finance@defuniaksprings.net

### City of Freeport

Sara Bowers, Finance Officer  
112 Highway 20 West  
Freeport, FL 32439  
850.835.2722 ext. 212  
accounting@freeportflorida.gov



***I took the reins as Okaloosa County Administrator during a period in County history where our system of internal controls and financial reserves had not been a priority.***

***Warren Averett was a partner in facilitating recommendations to management and governance that pushed the County to rebuild its financial infrastructure. Their approach is simply different from other CPA firms I have worked with. From strategically building our reserves to increasing our bond rating across all funds, we are in a much better financial position today because of our partnership with Warren Averett."***

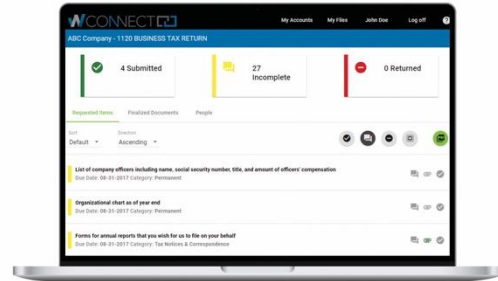
**- John Hofstad, County Administrator  
Okaloosa County**

# CONNECT, COMMUNICATE AND LEARN MORE

## RESOURCES OUR CLIENTS LOVE

### Warren Averett Connect

Our custom, client-centered portal is dedicated to making communicating with your CPA simple and easy. Warren Averett was a winner of the 2019 "Best Firms in Technology Award" by Accounting Today.



#### Convenient

Transfer documents, track progress in real time and interact with your advisor wherever you are



#### Safe

Featuring the highest level of encryption



#### Always On

24/7 access to filed returns, financial statements and more



#### Personalized

Create custom notifications and reminders

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# APPENDIX A

## APPENDIX A

### SCHEDULE OF PROFESSIONAL FEES AND EXPENSES

#### FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS

|                                       | <u>Hours</u>  | <u>Standard<br/>Hourly<br/>Rates</u> | <u>Total</u>      |
|---------------------------------------|---------------|--------------------------------------|-------------------|
| Partners                              | <u>92</u>     | <u>\$250</u>                         | <u>\$23,000</u>   |
| Managers                              | <u>150</u>    | <u>\$195</u>                         | <u>\$29,250</u>   |
| Supervisory Staff                     | <u>113</u>    | <u>\$165</u>                         | <u>\$18,645</u>   |
| Staff                                 | <u>122</u>    | <u>\$140</u>                         | <u>\$17,080</u>   |
| Other (specify)                       |               |                                      |                   |
| <u>Discount</u>                       | <u>      </u> | <u>      </u>                        | <u>(\$12,975)</u> |
| Subtotal                              | <u>477</u>    | <u>      </u>                        | <u>\$75,000</u>   |
| Out-of-pocket expenses:               |               |                                      |                   |
| Meals and lodging                     | <u>      </u> | <u>      </u>                        | <u>      </u>     |
| Transportation                        | <u>      </u> | <u>      </u>                        | <u>      </u>     |
| Other (specify):                      |               |                                      |                   |
| <u>                    </u>           | <u>      </u> | <u>      </u>                        | <u>      </u>     |
| Partners maximum price for 2021 audit |               |                                      | <u>\$75,000</u>   |

APPENDIX A – Continued

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES  
FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS  
COMBINING SCHEDULE – ALL SERVICES  
DESCRIBED IN RFP SECTION III

| <u>Nature of Service to Be Provided</u>                | <u>Total Price</u> | <u>Schedule</u> |
|--------------------------------------------------------|--------------------|-----------------|
| <u>City's Basic Financial Statement Audit</u>          | <u>\$70,000</u>    | <u>1</u>        |
| <u>CRA Audit</u>                                       | <u>\$5,000</u>     | <u>2</u>        |
| <u>Single Audit (per major program) (if necessary)</u> | <u>\$4,000</u>     | <u>3</u>        |
| <u>_____</u>                                           | <u>_____</u>       | <u>_____</u>    |

EACH SERVICE DESCRIBED IN RFP SECTION III SHOULD BE SUPPORTED BY AN INDIVIDUAL SCHEDULE IN THE FORMAT PROVIDED ON PAGE 3 OF THIS APPENDIX.

APPENDIX A - Continued

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES  
FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS

Schedule 1

|                           | <u>Standard<br/>Hours</u> | <u>Standard<br/>Rates</u> | <u>Total</u>     |
|---------------------------|---------------------------|---------------------------|------------------|
| Partners                  | <u>84</u>                 | <u>\$250</u>              | <u>\$21,000</u>  |
| Managers                  | <u>140</u>                | <u>\$195</u>              | <u>\$27,300</u>  |
| Supervisory Staff         | <u>98</u>                 | <u>\$165</u>              | <u>\$16,170</u>  |
| Staff                     | <u>102</u>                | <u>\$140</u>              | <u>\$14,280</u>  |
| Other (specify)           |                           |                           |                  |
| <u>Discount</u>           | <u>      </u>             | <u>      </u>             | <u>(\$8,750)</u> |
| Subtotal                  | <u>424</u>                | <u>      </u>             | <u>\$70,000</u>  |
| Out-of-pocket expenses:   |                           |                           |                  |
| Meals and lodging         | <u>      </u>             | <u>      </u>             | <u>      </u>    |
| Transportation            | <u>      </u>             | <u>      </u>             | <u>      </u>    |
| Other (specify):          |                           |                           |                  |
| <u>                  </u> | <u>      </u>             | <u>      </u>             | <u>      </u>    |
| Total Price               |                           |                           | <u>\$70,000</u>  |



APPENDIX A - Continued

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES

FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS

Schedule 2

|                           | <u>Standard<br/>Hours</u> | <u>Standard<br/>Rates</u> | <u>Total</u>     |
|---------------------------|---------------------------|---------------------------|------------------|
| Partners                  | <u>8</u>                  | <u>\$250</u>              | <u>\$2,000</u>   |
| Managers                  | <u>10</u>                 | <u>\$195</u>              | <u>\$1,950</u>   |
| Supervisory Staff         | <u>15</u>                 | <u>\$165</u>              | <u>\$2,475</u>   |
| Staff                     | <u>20</u>                 | <u>\$140</u>              | <u>\$2,800</u>   |
| Other (specify)           |                           |                           |                  |
| <u>Discount</u>           | <u>      </u>             | <u>      </u>             | <u>(\$4,225)</u> |
| Subtotal                  | <u>53</u>                 | <u>      </u>             | <u>\$5,000</u>   |
| Out-of-pocket expenses:   |                           |                           |                  |
| Meals and lodging         | <u>      </u>             | <u>      </u>             | <u>      </u>    |
| Transportation            | <u>      </u>             | <u>      </u>             | <u>      </u>    |
| Other (specify):          |                           |                           |                  |
| <u>                  </u> | <u>      </u>             | <u>      </u>             | <u>      </u>    |
| Total Price               |                           |                           | <u>\$5,000</u>   |

APPENDIX A - Continued

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES  
FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS

Schedule 3

|                           | <u>Standard<br/>Hours</u> | <u>Standard<br/>Rates</u> | <u>Total</u>      |
|---------------------------|---------------------------|---------------------------|-------------------|
| Partners                  | <u>8</u>                  | <u>\$250</u>              | <u>\$2,000</u>    |
| Managers                  | <u>0</u>                  | <u>\$195</u>              | <u>          </u> |
| Supervisory Staff         | <u>12</u>                 | <u>\$165</u>              | <u>\$1,980</u>    |
| Staff                     | <u>8</u>                  | <u>\$140</u>              | <u>\$1,120</u>    |
| Other (specify)           |                           |                           |                   |
| <u>Discount</u>           | <u>          </u>         | <u>          </u>         | <u>(\$1,100)</u>  |
| Subtotal                  | <u>28</u>                 | <u>          </u>         | <u>\$4,000</u>    |
| Out-of-pocket expenses:   |                           |                           |                   |
| Meals and lodging         | <u>          </u>         | <u>          </u>         | <u>          </u> |
| Transportation            | <u>          </u>         | <u>          </u>         | <u>          </u> |
| Other (specify):          |                           |                           |                   |
| <u>                  </u> | <u>          </u>         | <u>          </u>         | <u>          </u> |
| Total Price               |                           |                           | <u>\$4,000</u>    |

## APPENDIX B – PUBLIC ENTITY CRIMES STATEMENT

### APPENDIX B

#### ***PUBLIC ENTITY CRIMES STATEMENT***

Any person submitting a quote, bid, or proposal in response to this invitation or a contract, must execute the enclosed for PUR, 7069, sworn statement under section 287.133 (3)(a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES, including proper check(s), in the space(s) provided, and enclose it with this quote, bid or proposal. If you are submitting a quote, bid, or proposal on behalf of dealers or suppliers who will ship commodities and receive payment from the resulting contract, it is your responsibility to see that copy(ies) of the form are executed by them and are included with your quote, bid or proposal. Corrections to the form will not be allowed after the quote, bid, or proposal opening time and date. Failure to complete this form in every detail and submit it with your quote, bid, or proposal may result in immediate disqualification of your bid or proposal.

The 1989 Florida Legislature passed Senate Bill 458 creating Sections 287.132-133, Florida Statutes, and effective July 1, 1989. Section 287.132(3) (d), Florida Statutes, requires the Florida Department of General Services to maintain and make available to other political entities a "convicted vendor" list consisting of persons and affiliates who are disqualified from public contracting and purchasing process because they have been found guilty of a public entity crime. A public entity crime is described by Section 287.133, Florida Statutes, as a violation of any State or Federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or with an agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

By law no public entity shall accept any bid from, award any contract to, or transact any business in excess of the threshold amount provided in Section 287.017, Florida Statutes, for category two with any person or affiliate on the convicted vendor list for a period of 36 months from the date that person or affiliate was placed on the convicted vendor list unless that person or affiliate has been removed from the list pursuant to Section 287.133(3) (f), Florida Statutes.

Therefore, effective October 1, 1990, prior to entering into a contract (formal contract or purchase order in excess of the threshold amount for category two) to provide goods or services to **THE CITY OF CRESTVIEW**, a person shall file a sworn statement with the contracting officer or City Clerk, as applicable. The attached statement or affidavit will be the form to be utilized and must be properly signed in the presence of a notary public or other officer authorized to administer oaths and properly executed.

**THE INCLUSION OF THE SWORN STATEMENT OR AFFIDAVIT SHALL BE SUBMITTED CONCURRENTLY WITH YOUR QUOTE, PROPOSAL OR BID DOCUMENTS. NON-INCLUSION OF THIS DOCUMENT MAY NECESSITATE REJECTION OF YOUR QUOTE, PROPOSAL OR BID.**

SWORN STATEMENT UNDER SECTION 287.133(3) (a),  
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

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

1. This sworn statement is submitted with the Independent Auditing Services Proposal for THE CITY OF CRESTVIEW.
2. This sworn statement is submitted by Warren Averett, LLC, whose business address is 45 Egin Parkway, N.E., Suite 301, Fort Walton Beach, FL 32548 and (if applicable) its Federal Employer Identification (FEIN) is 45-4084437.
3. My name is Angela D. Balent, CPA (please print name of individual signing) and my relationship to the entity name above is Member.
4. I understand that "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract of goods or services to be provided to any public entity or an agency or political subdivision of any other state of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
  - (a) A predecessor or successor of a person convicted of a public entity crime; or
  - (b) An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services led by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)  
  
☒ Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

- The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (Please indicate which additional statement applies.)
- There has been a proceeding concerning the conviction before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)
- The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)
- The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services).

Angela D. Balent  
(Signature)

Date: 1/4/2022

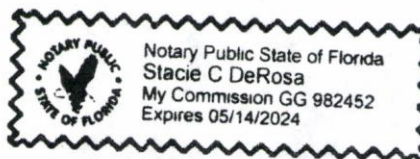
STATE OF FLORIDA

COUNTY OF Okaloosa

The foregoing instrument was acknowledged before me this 4 day of January, 2022 by Angela Balent, member (title) on behalf of Warren Averett, LLC. He/she is personally known to me or has produced \_\_\_\_\_ as identification and did ( ) did not ( ) take an oath.

Stacie C. DeRosa  
(Notary Signature)

Name Stacie C. DeRosa  
My Commission Expires 5-14-24  
Commission Number GG982452



## APPENDIX C – DRUG-FREE WORKPLACE FORM

### APPENDIX C

#### ***Drug-Free Workplace Form***

The undersigned, in accordance with Florida Statute 287.087 hereby certifies that Warren Averett, LLC  
does:

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' policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, 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 a copy of the statement specified in paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working the commodities or contractual services that 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 1893 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 Paragraph 1 through 5.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

1/4/2022

Date

Angela D. Balent, CPA  
Member

Name and Title

*Angela D. Balent, CPA*

## CERTIFICATE OF INSURANCE

Warren Averett maintains adequate insurance coverage based on the nature of the services performed and the size and scope of our clients. This includes workers compensation, general liability, automobile liability and umbrella policies. A certificate of insurance is available upon request.





**LET'S THRIVE TOGETHER**



# PURVIS GRAY

CERTIFIED PUBLIC ACCOUNTANTS

75<sup>TH</sup>  
ANNIVERSARY

## 1—TITLE PAGE

### CITY OF CRESTVIEW

Request for Proposal

Independent Auditing Services

Due Date: January 6, 2022 @ 2:00 P.M.

### CONTACT

Ryan M. Tucker, CPA,  
Audit Partner

(850) 224.7144  
ryan@purvisgray.com

Purvis, Gray and Company, LLP  
Certified Public Accountants

443 East College Avenue.  
Tallahassee, Florida 32301

*Gainesville | Ocala | Tallahassee | Sarasota | Orlando | Lakeland*

purvisgray.com

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City of Crestview, Florida  
Attention: Audit Committee  
Crestview, Florida

We appreciate the opportunity to present Purvis, Gray and Company, LLP (Purvis Gray) to your Audit Committee and would take great pride in being selected to serve as your auditors for the City Crestview, Florida (the City). We have received your request for *Independent Auditing Services*; **we understand the scope of work to be performed, and we give you our express commitment to meet or exceed the performance specifications and time requirements stated in the RFP.** Our proposal is submitted in good faith without collusion or fraud.

## ***Business Structure***

Purvis Gray is a **state-wide CPA firm** employing over 100 professionals and support staff in our **Tallahassee, Gainesville, Ocala, Sarasota, Orlando, and Lakeland** offices. Our multiple office locations throughout the state are the result of **organic growth** from within the firm, without merger or acquisition, which we attribute to our pursuit of **technical excellence and superior client service.** We are celebrating our **75<sup>th</sup> anniversary**, having audited and advised Florida local governments almost since our inception in 1946.

## ***Our People***

The best part of Purvis Gray is our people. The individuals comprising your audit team have chosen careers in governmental auditing and are committed to our governmental clients and their industry. You will not have to train our auditors; we do not randomly rotate staff, and **you will regularly see partners and managers in the field, which is a hallmark of our service that sets us apart from other firms that often provide only inexperienced staff with little or no manager or partner participation.** We believe that the in-depth knowledge and experience of the individuals **actually in the field performing your audit fieldwork will result in a superior audit product for the City.** Our team is committed to exceeding your expectations and maintaining your trust and confidence.

## ***Understanding Information Technology (IT) Risks***

One of the prominent business risks affecting governmental entities today is information technology. Cyber security over the very financial systems that we audit is a major focus of the City and Purvis Gray. Mr. Michael Sandstrum, the IT Director assigned to your engagement, has many years of experience auditing information systems, and maintains the CPA, CISA, CISM, CITP, and CGMA certifications. **Michael's extensive experience in accounting, auditing, IT auditing, and security management is paramount in understanding and evaluating the City's IT environment and risks** as a part of our financial audit of the City.

## ***Governmental Audit Experience***

We have considerable experience serving local governmental entities throughout the state of Florida since 1946. **We are currently providing auditing services to twenty-five Florida municipalities (most of which operate water and wastewater utilities), six Florida counties, nine Florida school boards, five rural electric cooperatives, and many other governmental special districts and non-profit organizations.** We believe our combined experience serving municipalities and utilities is **unmatched in Florida.** Most of our governmental audits include **Federal and State Single Audits**, so we stay up to date on the latest changes from both the federal and state sources, including the recent **Uniform Guidance.** We have audited hundreds of different **federal and state grant programs**, including all of the state and federal agencies that fund the City's programs.

CERTIFIED PUBLIC ACCOUNTANTS

Gainesville | Ocala | Tallahassee | Sarasota | Orlando | Lakeland

purvisgray.com

Members of American and Florida Institutes of Certified Public Accountants

An Independent Member of the BDO Alliance USA

City of Crestview, Florida  
Attention: Audit Committee  
Crestview, Florida

## ***Implementation of New Accounting Standards and Related***



During the past several years, we have assisted many governmental entities with implementing new GASB accounting and financial reporting standards that have significantly affected the City's financial statements. These

include, but are not limited to, GASB No. 68 on *Pension Accounting*, GASB No. 75 on *Other Postemployment Benefits*, and other pronouncements dealing with Investment and Debt disclosures.

As we look ahead, there are several significant new GASB pronouncements that will dramatically affect the City's financial statements, primarily **GASB No. 84 on *Fiduciary Activities***, which may require defined contribution pension plan trust fund reporting, and **GASB No. 87 on *Leases***, which will require most long-term leases to be recorded on the City's financial statements as Right-to-Use Assets and a corresponding Lease Obligation Payable. Your audit team is up to date on these and all other GASB pronouncements and stands ready to assist you in implementation.

## ***Member of BDO Alliance USA***

We are an independent member of the **BDO Alliance USA**, a national association of independently owned accounting and consulting firms that partner with BDO, a nationally recognized CPA firm, to provide us access to additional national resources for the benefit of our clients. By supplementing our services, the **BDO Alliance USA** allows us to:

- ▶ **Enhance our client services** and broaden our capabilities overall.
- ▶ Gain **greater technical knowledge** in specialty areas with the depth of resources available to international firms.
- ▶ Utilize other **nationwide professionals** with experience in governmental and other industries.

Being a part of the **BDO Alliance USA** allows us to bring **high-quality national resources** to bear on any auditing or consulting aspect of the City's engagement.

## ***COVID-19 Considerations***

At Purvis Gray we have been dealing with the pandemic-related concerns in excess of eighteen months now and have full capabilities to work either on site at our client's offices, if conditions permit, with appropriate safeguards, or work remotely without a loss of audit quality or efficiency. **Technology tools**, such as our **CaseWare paperless audit system**, **Citrix ShareFile client portal**, and **Suralink**, ensure secure file sharing and real-time document request coordination, and facilitate timely completion of a high-quality audit, either on-site or remotely.

## ***Authorization to Represent the Firm***

Ryan M. Tucker, CPA will be the partner in charge of the City's audit and is authorized to represent the firm in this matter. If we can supply you with additional information, we will be available at your convenience.

Respectfully submitted,

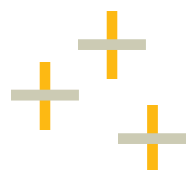
PURVIS, GRAY AND COMPANY, LLP

A handwritten signature in blue ink that reads "Ryan Tucker".

Ryan M. Tucker, CPA, Audit Partner  
(850) 224-7144  
443 East College Avenue  
Tallahassee, Florida 32301

RMT/asb

# QUALIFICATIONS OF THE AUDITOR/ MANDATORY ELEMENTS



**PURVIS GRAY**  
CERTIFIED PUBLIC ACCOUNTANTS



# QUALIFICATIONS OF THE AUDITOR/MANDATORY ELEMENTS

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## 1—License to Practice in Florida

We are properly licensed and registered for public practice in the State of Florida, and our professional staff are properly licensed and registered to practice as certified public accountants in the State of Florida or are “exam-eligible”. A copy of our firm license to practice in Florida is shown below:



## 2—Independence

We are independent certified public accountants as defined by generally accepted auditing standards and *Government Auditing Standards*, issued by the Comptroller General of the United States. We are independent of the City and any of its component units, as defined in the U.S. Government Accountability Offices’ *Government Auditing Standards* and Generally Accepted Auditing Standards. We confirm that we will give the City written notice of any professional relationships entered into involving the City, or any of its agencies or component units, during the period of this agreement.

## 3—CPA Services Established in Florida

Purvis Gray was founded in 1946, in Gainesville, Florida by two University of Florida accounting professors, Mr. Roy Purvis and Mr. Howard Gray. The firm is organized as a Florida Limited Liability Partnership, authorized to do business in the State of Florida, and has been auditing local governmental and non-profit entities substantially since formation.

## 4—Members and Good Standing with AICPA and FICPA



Purvis Gray has been a member with the American Institute of Certified Public Accountants since 1978 (AICPA – Reference #1783188) and continues to be in good standing with the AICPA and Florida Institute of Certified Public Accountants (FICPA – Member #02004618).

## 5—Staff Expertise

Our team is committed to exceeding your expectations and maintaining your trust and confidence. Detailed information of your audit team members begins on page 16.



# QUALIFICATIONS OF THE AUDITOR/MANDATORY ELEMENTS

---

## 6—CPE Requirements



As members of the Government Audit Quality Center of the AICPA, each CPA is required to obtain eighty hours of continuing professional education every two years. The continuing professional education material is presented by nationally prominent accounting professors and other individuals who have thorough knowledge of auditing local governments and non-profit entities.

Your entire audit team is in full compliance with the continuing educational requirements set forth under U.S. Government Accountability office, *Government Auditing Standards*. Beginning on page 18, your audit team members' résumés provide more specific listing of their continuing education.

Our partners, directors, managers, supervisors, and senior staff members also attend annual conferences sponsored by the AGA, FGFOA, FSFOA, FECA, FMEA/FMPA, and FACC where they attend and often present continuing education classes that deal with new FASB and GASB pronouncements and current issues in Florida law and other similar topics. *Client accounting staff are routinely invited to attend our continuing education classes throughout the year at no cost, which generally equals 16 hours per year.*

Members of the audit team assigned to the City's audit have attended numerous courses on auditing and have participated in audits of many cities, counties, school boards, and other governmental entities, as well as non-profit organizations. *In addition, all of our Audit Department personnel are in full compliance with the continuing educational requirements set forth under U.S. Government Accountability Office (GAO), Government Auditing Standards.* The following is a brief list of some of the continuing education class topics that our partners and supervisory-level staff have recently taught:

- ▶ SAS Update for Financial Managers (The New Risk Standards)
- ▶ Auditing Update—Hot Topics for Fiscal Officers and Auditors
- ▶ The New Single Audit Requirements
- ▶ Debt-Accounting, Covenants, Compliance
- ▶ State-Shared and Local Option Revenues
- ▶ Governmental Compliance Auditing in Florida—Local Laws and Regulations
- ▶ Internal Controls for Managers
- ▶ The State Financial Emergency Law
- ▶ The New Pension Accounting Standards: A Game Changer!
- ▶ Understanding the New COSO Framework
- ▶ Internal Controls and Fraud and GASB Update
- ▶ The New Federal "Omni Circular" Effects on the Auditee and Auditor
- ▶ GASB Update
- ▶ Understanding the Statement of Cash Flows
- ▶ Understanding Your Cost of Power Adjustment
- ▶ GASB 84 - Fiduciary Activities
- ▶ GASB 87 - Leases
- ▶ Grant Accounting and the Single Audit

## 7—No Disciplinary Actions

We have no record of substandard work and have no enforcement actions pending by the State Board of Accountancy or any other regulatory agency or professional organization, nor have we had any such actions during the past three years.

# QUALIFICATIONS OF THE AUDITOR/MANDATORY ELEMENTS

## 8—No Federal or State Desk Review

Purvis Gray is not aware of any federal or state desk reviews, nor have there been field reviews of its audits during the past three years by state regulatory bodies or professional organizations.

## 9—Working Papers and External Quality Control Review

We understand that all working papers and reports for the City must be retained at our expense for a minimum of three years, unless we are notified by the City in writing of the need to extend this retention period. We also understand that we will be required to make these working papers available upon request to the City, GAO, and/or parties designated by the federal or state governments or by the City as part of an audit quality review process.

Purvis Gray is a member of the AICPA's Governmental Audit Quality Center (GAQC). Our firm places high priority on its quality control and has successfully undergone a peer review made by the AICPA at least every three years since 1979. Because our firm has a heavy concentration of governmental clients, governmental audit engagements are selected for review by the peer review team. We have included a copy of our 2019 Peer Review Report, which included a pass rating, with no letter of comments, the highest level obtainable.



*Jones, Nale & Mattingly PLC*

**REPORT ON THE FIRM'S SYSTEM OF QUALITY CONTROL**

To the Partners of  
Purvis, Gray and Company, LLP  
and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Purvis, Gray and Company, LLP (the firm) in effect for the year ended May 31, 2019. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary). The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

**Firm's Responsibility**

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

**Peer Reviewer's Responsibility**

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

**Required Selections and Considerations**

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under the Single Audit Act, audits of employee benefit plans, and examinations of service organizations (SOC 1 and SOC 2 engagements).

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

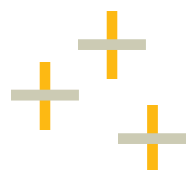
**Opinion**

In our opinion, the system of quality control for the accounting and auditing practice of Purvis, Gray and Company, LLP in effect for the year ended May 31, 2019, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Purvis, Gray and Company, LLP has received a peer review rating of *pass*.

*Jones, Nale & Mattingly PC*  
Louisville, Kentucky  
November 22, 2019

Certified Public Accountants and Advisors  
642 South Fourth Street, Suite 300 Louisville, Kentucky 40202 tel: 502.583.0248 fax: 502.589-1680 [www.jnmcpa.com](http://www.jnmcpa.com)

# INFORMATION TO BE INCLUDED IN THE PROPOSAL



**PURVIS GRAY**  
CERTIFIED PUBLIC ACCOUNTANTS

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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## **3—License to Practice in Florida**

Purvis Gray is properly licensed and registered for public practice as certified public accountants in the State of Florida, and all assigned professional staff are properly licensed and registered to practice as certified public accountants in the State of Florida or are “exam eligible”. A copy of our firm license to practice in Florida can be found on page 6.

## **4—Independence**

We are independent certified public accountants as defined by generally accepted auditing standards and *Government Auditing Standards*, issued by the Comptroller General of the United States. We are independent of the City and any of its component units, as defined in the U.S. Government Accountability Offices’ *Government Auditing Standards* and Generally Accepted Auditing Standards.

We have no knowledge of existing business or personal relationships between the firm, its partners, and employees, and any employee of the City.

We confirm that we will give the City written notice of any professional relationships entered into involving the City, or any of its agencies or component units, during the period of this agreement.

**There is no joint venture or consortium proposed.**

## **5—Understanding the Work**

We have received your request for proposal for Independent Auditing Services for the years ending September 30, 2021 through 2023, with the option of auditing its financial statements for each of the two subsequent fiscal years. We understand the work to be performed and give you our express commitment to meet or exceed the performance specifications as stated in your RFP **Section III; Services Required** beginning on page 5 of your RFP.

We understand that the audit will include the City’s financial reports and its two blended component units, the Community Redevelopment Agency and Crestview Unlimited, Inc.

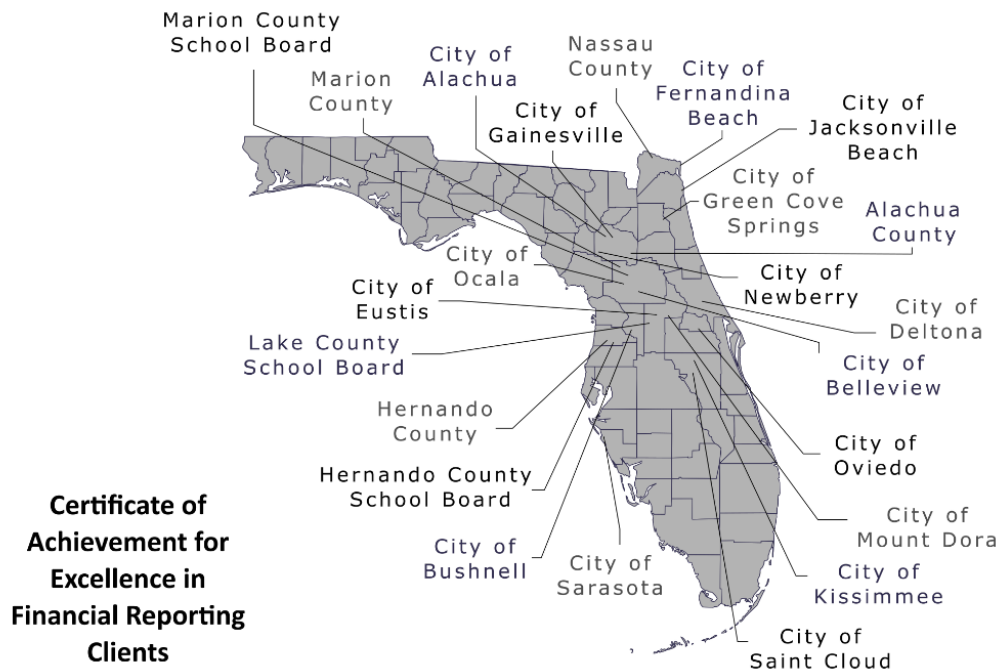
We will provide the City with any technical assistance to meet all your goals, including obtaining the Certificate of Achievement for Excellence in Financial Reporting in future years.

Receiving the Certificate of Achievement for Excellence in Financial Reporting is a highly recognized award. Several of the audit partners in our firm are members of the GFOA Special Review Committee for the Certificate of Achievement for Excellence in Financial Reporting Program. As such, they review ACFRs on behalf of GFOA all through the year, learning new techniques and presentation methods that will make the City’s ACFR the best it can be.

We are confident that we will be able to help the City obtain a Certificate of Achievement for Excellence in Financial Reporting with continued improvement in the ACFR product. In addition, we have provided expertise and assistances to many local governments, which helped them receive their Certificate of Achievement for Excellence in Financial Reporting. This information is located below:



# INFORMATION TO BE INCLUDED IN THE PROPOSAL



## 6—State-Wide CPA Firm and Range of Services

### PURVIS GRAY



#### State-Wide CPA Firm

Purvis Gray is a **state-wide CPA firm** employing over 100 professionals and support staff in our Tallahassee, Gainesville, Ocala, Sarasota, Orlando, and Lakeland offices. Our multiple office locations throughout the state are the result of **organic growth** from within the firm, without merger or acquisition, which we attribute to our pursuit of **technical excellence and superior client service**. We are celebrating our 75<sup>th</sup> anniversary, having audited and advised Florida governmental organizations since our inception in 1946.

#### BDO Alliance USA Services



As an Independent Member of the BDO Alliance USA, we have access to BDO's breadth and depth of resources, enabling us to provide virtually any tax or assurance service needed by our clients, anywhere in the country. We are able to provide our clients with access to technical and industry-specific resources of one of the largest accounting firms in the world, combined with our hands-on local service and knowledge.

In addition, the BDO Alliance Business Resource Network has established relationships with product and service providers to enhance our delivery capabilities and value to clients. Through these relationships, we are able to offer greater insight and more effective solutions to the City.

As a member of BDO Alliance USA, we take a comprehensive approach to assessing and serving your needs. Through the core accounting and financial services we provide, we are uniquely positioned to identify additional opportunities to improve the overall operational effectiveness of your organization.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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## Range of Services

The firm offers all services traditionally associated with CPA firms, which can generally be summarized as Audit, Tax, and Information Technology services. The Audit Department is the largest department, comprising approximately sixty percent of gross revenues. The Audit Department has a concentration of work in the local governmental industry. Our Tax Department provides tax research support to our Audit Department. Also, as a member of BDO Alliance USA, we are able to provide our clients with access to the technical resources and manpower of the fifth-largest accounting firm in the world, combined with our hands-on local service and knowledge.

## Audit Department

The mission of the Audit Department is to achieve technical excellence, which can be used to provide the highest level of quality service to our clients. This higher level of service sets us apart from other firms.

*Our audit staff consists of:*

**8 Partners**

**6 Directors**

**7 Managers**

**20 Professional Staff**

All of the partners and managers are CPAs, as are many of the other professional staff. If not CPAs, the professional staff are “exam-eligible” or working toward it.

Your “engagement team” will be led by a partner and a senior manager, with these individuals on-site for a significant portion of fieldwork. For more information on the specific individuals committed to your engagement, please refer to the staffing diagram found on page 16.

Our audit staff has extensive experience working in a computerized environment and utilizes laptop computers in the field with Microsoft Windows, Word, and Excel. **We employ a paperless audit approach.** We utilize the “paperless” audit documentation system designed by CaseWare International, Inc., the premier industry technology, with an integrated wired or wireless connection in the field. **We will be utilizing a combination of Citrix ShareFile and Suralink for the secure transmission and sharing of records and audit support, allowing for a smooth process of providing and tracking requested information. Suralink will also allow City staff to track the status of the engagement overall from a web based application with a desktop dashboard in real time.**

All members of the audit team will be available to your management team whenever you need us. If our physical presence is not needed, our business e-mail addresses and cell phone numbers will be made available for your convenience, and we pride ourselves on responding timely to all client inquiries. We will be available for routine questions and assistance year-round without additional billings.

## Accounting and Tax Services Department

The Accounting and Tax Services Department of Purvis Gray is often used in troubleshooting problem tax areas associated with audits of governmental entities. Our tax professionals provide support and assistance to our clients in the following areas:

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

- **Assisting** exempt organization clients and others with the changes of the revised Internal Revenue Service Form 990, including additional reporting requirements and functional changes made since the implementation of this revised return.

- **Providing** consulting services and representation of clients during examinations by the Internal Revenue Service and various state and local taxing authorities and agencies.

- **Developing** organizational structures involving related taxable and non-taxable entities for the purpose of minimizing the income tax ramifications of related-party transactions under the Internal Revenue Code, and maintaining the integrity of the entity by the use of wholly owned taxable subsidiaries and joint ventures. This includes the use of entities disregarded for federal income tax purposes even though recognized as separate legal entities under enacting state legislation.

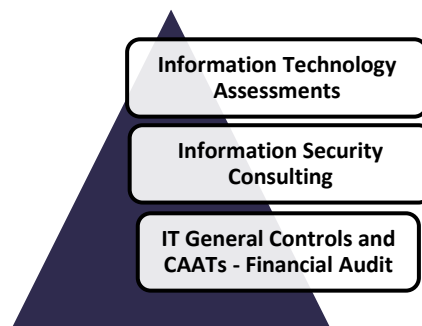
- **Structuring** transactions or business operations in order to lessen or eliminate the effect of the unrelated trade or business income tax which applies to not-for-profit entities or to maximize the tax benefit to donors for planned giving items, such as charitable remainder trusts and charitable annuities.

- **Advising** clients and firm with regards to the increased monitoring activity and compliance requirement of the Internal Revenue Service, including the Internal Revenue Service's recently expanded compliance plans for pass-through entities, i.e., partnerships and subchapter S corporations, and certain tax-exempt entities.

## ***Information Technology Department***

The IT Auditor/Consultant assigned to the City's audit engagement and our other IT Department professionals have extensive experience and proficiency working in various computerized environments.

Purvis Gray offers a full suite of IT audit, consulting, and assessment services. These services are performed by IT professionals with the CISA, CISM, CITP, CGMA, CRISC, and CPA designations and can be summarized as follows:





# INFORMATION TO BE INCLUDED IN THE PROPOSAL



**Purvis Gray's IT Audit professionals conduct the assessment of IT controls.** As part of the financial audit process, auditing standards require the auditor to gain an understanding of the IT environment, including the Information Technology General Controls, which includes determining suitability of design and whether the controls are implemented.

## **Information Security Consulting Offering**

**As your business partner,** our Information Security Program Design involves evaluating organizational security and compliance status using techniques such as interviews, observations, and documentation review:



## **Information Technology Assessments**

Information Technology Assessment engagements offered by Purvis Gray include the following:

### **Cybersecurity**

- AICPA Cybersecurity Engagements

### **SSAE-18 SOC Reports**

- SOC Types 1, 2, and 3 Engagements

## **AICPA Cybersecurity Engagements**



Cybersecurity threats are on the rise, challenging organizations of all sizes—whether public or private. Board members, commissioners, managers, investors, customers, residents, and other stakeholders are pressuring organizations to demonstrate that they are managing cybersecurity threats, and that they have put into place effective cybersecurity risk management programs to prevent, detect, and respond to security breaches.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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To meet that need, the AICPA has introduced [SOC for Cybersecurity](#), a solution that builds upon the profession's experience in auditing system and organization controls. It enables CPAs to examine and report on an organization's cybersecurity risk management program.

Purvis Gray can use the SOC for Cybersecurity criteria and guidance to provide advisory engagements to help our clients strengthen their cybersecurity risk management programs. Or, as an organization reaches a state of readiness, Purvis Gray as an independent CPA firm can offer a cybersecurity risk management examination engagement and provide an opinion on the entity's description of its efforts, and the effectiveness of its controls.

## ***SSAE-18 System and Organization Controls (SOC) 1, SOC 2, SOC 3 Examination and Reporting***

By having an extensive expertise in generally accepted auditing standards, both non-profit and for-profit accounting processes, information technology general controls, and the AICPA SSAE-18 attestation standards and requirements, combined with an experienced SOC staff, Purvis Gray can provide service organization user entities with a quality and professional SSAE-18 SOC 1 Type 2 report.

Because Purvis Gray's staff has extensive experience with the *Trust Services Criteria for Security, Availability, Processing Integrity, Confidentiality, and Privacy* (AICPA, *Trust Services Criteria*) and numerous types of third-party service offerings, we can provide service organization user entities with a quality and professional SSAE-18 SOC 2 or SOC 3 Type 2 report.

Purvis Gray can also assist organizations with getting ready for their first SOC Type 2 examination and can provide a Type 1 report upon completion of the readiness phase.

## ***Consulting Service Department***

The consulting practice of Purvis Gray utilizes members of the Audit, Accounting and Tax Services, and IT Departments to perform a wide range of consulting and management advisory services for our clients. Our consulting personnel have performed engagements in each of the following categories:

### **Accounting System Reviews**

- ▶ GASB Statement Implementations
- ▶ Internal Control Opinions
- ▶ Procedures Documentation
- ▶ Performance Audits and Cost Reduction Studies
- ▶ Feasibility/Efficiency Studies
- ▶ Budget Review and Budget Preparation

### **Other Financial Services**

- ▶ Expert Testimony
- ▶ Personal Financial/Retirement Planning
- ▶ Other Financial Services
- ▶ Tax Representation
- ▶ Fraud/Defalcation Engagements

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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## Business Valuations and Reorganizations

- ▶ Business Ownership Succession
- ▶ Business Valuations
- ▶ Mergers and Acquisitions
- ▶ Business Formations
- ▶ Business Liquidations

## Information Security and Privacy Controls and Consulting

- ▶ IT Security Controls Assessment
- ▶ Privacy Controls Assessment
- ▶ Information Security Policies and Procedures
- ▶ IT Risk Assessments

### Professional Memberships

Purvis Gray has been a member with the American Institute of Certified Public Accountants since 1978 (AICPA – Reference #1783188). Our firm continues to be in good standing with the AICPA and Florida Institute of Certified Public Accountants (FICPA – Member #02004618). *Several of the partners and staff of Purvis Gray are members of the following organizations:*

- |                                                    |                                               |
|----------------------------------------------------|-----------------------------------------------|
| ▶ AICPA                                            | ▶ FGFOA                                       |
| ▶ Government Audit Quality Center (GAQC)           | ▶ FICPA                                       |
| ▶ GFOA                                             | ▶ Employee Benefit Plan Audit Quality Center  |
| ▶ Florida Electric Cooperatives Association (FECA) | ▶ North Florida Chapter FGFOA                 |
| ▶ American Public Power Association (APPA)         | ▶ Southwest Chapter FGFOA                     |
| ▶ State of Florida League of Cities                | ▶ Association of Government Accountants (AGA) |
| ▶ Big Bend Chapter FGFOA                           | ▶ Nature Coast Chapter FGFOA                  |
| ▶ Florida Municipal Electric Association (FMEA)    | ▶ Florida Rural Water Association             |
| ▶ American Public Power Association                |                                               |

Members of our firm also participate in leadership roles in our profession. Currently, several of our partners and managers serve on committees and subcommittees of the FICPA, the FGFOA, and their affiliated organizations.

### 7—Office Location

The City's audit would be conducted out of our Tallahassee office with assistance from our other offices, as needed. The audit team includes a partner, a senior manager, and a supervisor auditor. These are all full-time, year-round auditors that are CPAs. For more information on the specific individuals committed to your engagement, please refer to the staffing diagram that can be found on page 16.

Purvis Gray operates on a departmental basis rather than an office basis. All of the firm's resources are available to all of the firm's clients and are utilized in that fashion to provide the best possible service. This ensures that we draw upon the knowledge of our specialists in the governmental field, as well as the full resources of the entire team. Our audit staff consists of a total of 8 partners, 6 directors, 7 managers, and 20 professional staff. Also, as a member of BDO Alliance USA, we are able to provide our clients with access to the technical resources and manpower of the fifth largest accounting firm in the world, combined with our hands-on local service and knowledge.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## 8—Audit Team Members

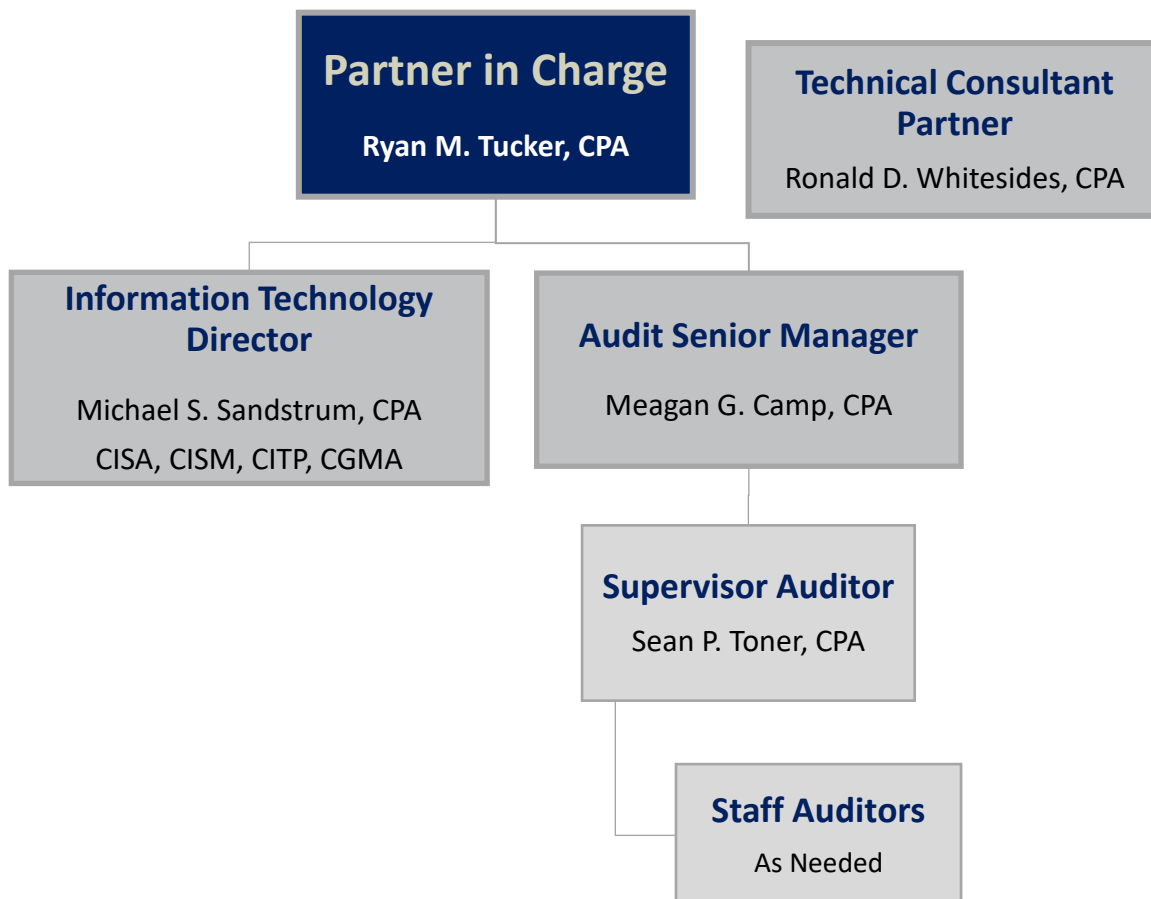
### Audit Team



The firm that will be the most qualified to serve as auditors for the City will be the one that can demonstrate its qualifications through past experience, education, and high quality control considerations. Our firm’s approach to staffing audit engagements is to choose your team based upon the expertise, experience, and technical ability needed to perform the audit engagement efficiently and provide the highest level of client service. **The individuals assigned to your audit possess the necessary technical skills and experience to ensure that the City receives the highest level of service.**

Personnel assigned to your audit team are primarily from the Tallahassee office, but all the resources of our firm are available to the audit team and to you, the client, at all times. **One thing we do differently from other firms—we regularly put partners and managers in the field.**

Ryan M. Tucker, CPA will be the partner in charge of the City’s audit engagement, and the team member ultimately responsible for managing the audit engagement with the City. He will be assisted by Ronald D. Whitesides, CPA, Partner as the independent concurring reviewer; and Meagan G. Camp, CPA, as audit senior manager; plus several others noted in the staffing chart below. Together, the audit team has over 100 years of experience in accounting and auditing governmental and non-profit organizations. All staff assigned to your engagement are licensed to practice as certified public accountants in the State of Florida and are employed by the firm on a full-time basis. We expect the entire audit team to return to the City on an annual basis.



# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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## Audit Team Roles

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Partner in Charge of Audit</b>      | Mr. Tucker will have overall responsibility for excellent client service; he will work closely with the City's management, audit senior manager, and audit supervisor to ensure that all work is properly planned, executed, and completed. He will conduct entrance, exit, and interim work conferences with the City and participate extensively in audit planning and fieldwork and the review process. |
| <b>Technical Consultant Partner</b>    | Mr. Whitesides will assist Mr. Tucker, providing consultation and review of technical accounting and auditing issues, and a final "cold" review of the audited financial statements and reports.                                                                                                                                                                                                           |
| <b>Information Technology Director</b> | Mr. Sandstrum will perform the internal control review of the City's computerized information systems and assist with custom report writing and PC download functions as required. He will assist with data analytics and provide assistance and recommendations to the City on computer-related areas, as needed.                                                                                         |
| <b>Audit Senior Manager</b>            | Ms. Camp will be responsible for planning and supervision of the audits. She will perform the review of workpapers and report preparation. In addition, she will assist in managing the efficiency of the audits and operating within the time budget.                                                                                                                                                     |
| <b>Supervisor Auditor</b>              | Mr. Toner will be primarily responsible for conducting and completing fieldwork along with staff auditors and assisting the audit senior manager with planning and supervision. He will keep the partner, senior manager, and City staff fully informed on the job status.                                                                                                                                 |

## Continuing Quality of Staff

Purvis Gray's number one priority is client service. The key to providing valuable service is staffing engagements with quality personnel. The individuals on your audit team are highly educated and experienced CPAs with a strong working knowledge of governmental accounting and auditing, exceptional business sense, and impeccable common sense. **These individuals will work directly and continually on your engagement.** We expect your audit team members to be available throughout your contract. While some staff turnover inevitably occurs, our firm makes every effort to maintain the high quality of our staff. We do this through hiring the best people, providing more than the minimum required continuing education, and mentoring. If it did become necessary to change any team members on your audit, the City has the right to approve or reject replacements.

## Résumés - Qualifications of Firm Personnel

Beginning on the next page, the partner in charge, consultant, director, senior manager, and supervisor's résumés provide more specific information for each individual, especially their participation in local government audits, professional and community memberships, leadership roles, and continuing education.



## RYAN M. TUCKER, CPA

Audit Partner

Member of Quality Control Team

Member of Concurring Review Team

**PURVIS  
GRAY**

### CONTACT INFORMATION

Tallahassee, Florida

[ryan@purvisgray.com](mailto:ryan@purvisgray.com)

### PROFILE

#### Education

Florida State University

1998, BS, Finance and Accounting

#### Professional Credentials

CPA Certificate – AC0032175

Member AICPA, FICPA, FGFOA, and AGA

Southern Scholarship Foundation, Inc.

Chairman – 2013

Treasurer – 2008-2009

Current Board Member

Sunset Rotary Club of Tallahassee

President – 2009-2010

Current Member

Rotary District 6940

Treasurer – 2012-2013, 2015-2016, and  
2016-2017

**Years in Accounting: 22**

**Years with Firm: 22**

### SPEAKER/INSTRUCTOR

*Accounting and Auditing Electric Cooperatives*

*Auditor Independence*

*Financial Emergencies and Financial Condition Assessments*

*GASB 67 and 68 Pension Standards Update*

*What to Expect from Your Auditor*

*Common CAFR Review Comments*

*Compliance Auditing for Constitutional Officers*

*GASB Update*

### EXPERIENCE SERVING CLIENTS

#### Governmental Experience

##### **Municipalities**

City of Atlantic Beach, Florida\*

City of Belleview, Florida\*

City of Deltona, Florida\*

City of Dunnellon, Florida\*

City of Fernandina Beach, Florida\*

City of Jacksonville Beach, Florida\*

City of Jacob City, Florida

City of Lake City, Florida\*

City of Live Oak, Florida\*

City of Leesburg, Florida\*

City St. Cloud, Florida\*

Town of Altha, Florida\*

##### **Counties**

Alachua County, Florida\*

Bradford County, Florida

Citrus County, Florida\*

Flagler County, Florida\*

Gadsden County, Florida\*

Hardee County, Florida\*

Liberty County, Florida\*

Nassau County, Florida\*

Sarasota County, Florida\*

Wakulla County, Florida\*

#### **School Board and Charter School Experience**

Clay County District School Board\*

Florida State University School\*

Jefferson County District School Board (Accounting/Consulting)

Leon County District School Board\*

**\*OMB Circular A-133 or Uniform Guidance Single Audits and/or Florida Single Audits**

# Ryan M. Tucker, CPA

Audit Partner

Member of Quality Control Team

Member of Concurring Review Team

## EXPERIENCE SERVING CLIENTS

---

### Governmental Experience

#### *Other Governmental Entities*

Dog Island Conservation District

Northwest Florida Water Management District\*

Quincy-Gadsden Airport Authority

Withlacoochee Regional Water Supply Authority

### Non-Profit Experience

Association for Institutional Research, Inc.\*

Association for Retarded Citizens - Marion, Inc.

Bridgeway Center, Inc.\*

CareerSource Florida, Inc.\*

Childhood Development Services, Inc.\*

Early Learning Coalition of the Big Bend

Florida Association of Court Clerks, Inc. and Subsidiary

Florida Bankers Association, Inc. and Affiliates

Florida Coalition for Children, Inc. and Florida Coalition  
for Children Foundation, Inc.

Florida Health Maintenance Organization Consumer Plan

Florida Health Reinsurance Programs

Florida Home Builders Association and Affiliates

Florida Independent Automobile Dealers Association, Inc.

Florida Institute of Certified Public Accountants, Inc.

Florida Low Income Housing Association, Inc.\*

Florida Outdoor Advertising Association, Inc.

Florida Medical Practice Plan, Inc.

Florida Sheriffs Youth Ranches, Inc.

Florida State University International Programs Association

Florida State University Research Foundation

Gainesville Golf and Country Club

Marion-Citrus Mental Health Centers, Inc. (The Centers)

North Florida Workforce Development Board, Inc.

Northwest Regional Data Center

Pediatric Primary Care Foundation, Inc.

United Way of Marion County, Inc.

University of Florida Tissue Bank, Inc.

### Utility Experience

Choctawatchee Electric Cooperative, Inc. (E)

City of Atlantic Beach, Florida\* (W, S)

City of Belleview, Florida\* (W, S)

City of Deltona, Florida\* (W, S)

City of Fernandina Beach, Florida\* (W, S)

City of Jacksonville Beach, Florida\* (E, G, W, S)

City of Lake City, Florida\* (G, W, S)

City of Live Oak, Florida\* (G, W, S)

City St. Cloud, Florida\* (W, S)

Gulf Coast Electric Cooperative, Inc. (E)

Kissimmee Utility Authority (E)

Peace River Electric Cooperative, Inc. (E)

Sumter Electric Cooperative, Inc. (E)

Sun 'N Lake of Sebring Improvement District (W, S)

Suwannee Valley Electric Cooperative, Inc.

Talquin Electric Cooperative, Inc. (E, W, S)

Town of Altha, Florida\*

Withlacoochee River Electric Cooperative, Inc. (E)

### Employee Benefit Plan Experience

Advocacy Resource Center Marion, Inc. Retirement Plan 401(k)

City of Fernandina Beach - 2 Defined Benefit Retirement Plans

City of Jacksonville Beach - 3 Defined Benefit Retirement Plans

City of Live Oak - Defined Benefit Retirement Plan

Command Web Missouri 401(k) Plan

Esposito Nursery Profit Sharing Plan

Florida Sheriffs Youth Ranches Pension Plan

Give Kids the World, Inc. 403(b) Plan

Southeast Corporate Federal Credit Union 401(k) Plan & Trust

The Centers 401(k) Savings Plan

The Villages Charter School Savings Plan

Unimac Graphics Union, 401(k) Plan

Unimac Non-Union 401(k) Plan

ZRS Management, LLC 401(k)

### Other Experience

Gadsden Correctional Institute Tallahassee Diagnostic Imaging  
Center LTD

Radiology Associates of Tallahassee, P.A.

Villages Bancorporation, Inc.

**\*OMB Circular A-133 or Uniform Guidance Single Audits and/or Florida Single Audits**

**(E)—Electric (G)—Natural Gas (W)—Water (S)—Sewer**



# Ryan M. Tucker, CPA

## CPE Credits

Mr. Tucker is in full compliance with the continuing educational requirements set forth under U.S. Government Accountability Office (GAO), *Government Auditing Standards*. A list of the relevant continuing professional education for the past three years follows:

### 2021

- ▶ Purvis Gray Lunch & Learn Series – Depreciation
- ▶ Purvis Gray Winter CPE Series
- ▶ FGFOA 2021 Conference Auditing Governmental
- ▶ FGFOA 2021 Personal Development
- ▶ FGFOA 2021 Specialized Knowledge
- ▶ Surgent McCoy CPE Florida Ethics for CPAs

### 2020

- ▶ Families First Coronavirus Response Act
- ▶ Purvis Gray ASC 606 Training
- ▶ CiviTek AUP Training Webinar
- ▶ COVID-19 Everything you Need to Know about GEMA Grants & Preventing Inspector General Findings
- ▶ Applying the New Lease Accounting Standard
- ▶ IPA Panel General Session Day Two
- ▶ Ensuring Engagement Quality When Performing SSARS Engagement
- ▶ Practice Issues Under ASC 606 Revenue Controls with Customers
- ▶ Variable Interest Entities and Consolidation Matters Practice Issues
- ▶ 2018 Yellow Book What you Need to Know
- ▶ Business Combinations Practice Issues
- ▶ Non-Profit Accounting Update
- ▶ Excel Tips and Tricks
- ▶ CaseWare Fundamentals
- ▶ Employee Benefit Plan Audit Update
- ▶ Managing the Audit Process
- ▶ 2020 Virtual TFACC
- ▶ Emergency Management Preparing Documentation for FEMA Reimbursement
- ▶ 2020 Nonprofit and Education, Governmental and Healthcare Industry Conference General Session
- ▶ GASB Pension Plans
- ▶ GASB 84 Fiduciary Activities
- ▶ Common Financial Reporting Deficiencies
- ▶ Business Type Activities and Proprietary Funds

### 2019

- ▶ PGC – Ethics Protecting the Integrity of Florida
- ▶ PGC Accounting & Auditing Updates
- ▶ EBP Training
- ▶ Retirement Benefits GASB & Reporting – Instructor Credit
- ▶ FGFOA Annual Conference – Opening General Session 7 Keys to Success
- ▶ FGFOA Annual Conference – GASB 87 Deep Dive
- ▶ FGFOA Annual Conference – State Compliance for Local Governments
- ▶ FGFOA Annual Conference – Year-End Financial Reporting Considerations
- ▶ FGFOA Annual Conference – GASB Update
- ▶ FGFOA Annual Conference – Block Chain and Cryptocurrency
- ▶ FGFOA Annual Conference – Legislative Update
- ▶ FGFOA Annual Conference – The Internal Audit Function
- ▶ FGFOA Annual Conference – Lessons Learned Control Deficiencies
- ▶ Florida Electric Coop Association Finance and Accounting Conference – FDEM Overview of PA Process
- ▶ Florida Electric Coop Association Finance and Accounting Conference – FEDM 404 Mitigation Overview
- ▶ Florida Electric Coop Association Finance and Accounting Conference – EV/Charging Station Projections in FL
- ▶ Florida Electric Coop Association Finance and Accounting Conference – FEMA/FDEM Lessons Learned/Hurricane
- ▶ Florida Electric Coop Association Finance and Accounting Conference – Tax Cuts and Jobs Act
- ▶ Florida Electric Coop Association Finance and Accounting Conference – Single Audit and FEMA Requirements
- ▶ Florida Electric Coop Association Finance and Accounting Conference – Political and Economic Update
- ▶ Florida Electric Coop Association Finance and Accounting Conference – Federated Insurance Update
- ▶ Florida Electric Coop Association Finance and Accounting Conference – Current Audit and Accounting Issues



## RONALD D. WHITESIDES, CPA

Audit Partner

Chair of Audit Department

Member of Quality Control Team

Member of Concurring Review Team

**PURVIS  
GRAY**

### CONTACT INFORMATION

Gainesville, Florida

(352) 378-2461

[rwhitesides@purvisgray.com](mailto:rwhitesides@purvisgray.com)

### PROFILE

#### Education

University of Florida

1991, Masters, Accounting

#### Professional Credentials

CPA Certificate – AC0025357

Member AICPA, FICPA, and FGFOA

**Years in Accounting: 30**

**Years with Firm: 28**

### EXPERIENCE SERVING CLIENTS

#### Governmental Experience

##### ***Municipalities***

City of Alachua, Florida\*

City of Atlantic Beach, Florida\*

City of Bartow, Florida\*

City of Fernandina Beach, Florida\*

City of Fort Meade, Florida\*

City of Fort Myers, Florida\*

City of Gainesville, Florida\*

City of Green Cove Springs, Florida\*

City of Jacksonville Beach, Florida\*

City of Keystone Heights, Florida\*

City of Lake City, Florida\*

City of Mount Dora, Florida\*

City of Newberry, Florida\*

City of Neptune Beach, Florida\*

City of St. Augustine Beach, Florida\*

Town of Orange Park, Florida\*

##### ***Counties***

Alachua County, Florida\*

Bradford County, Florida\*

Flagler County, Florida\*

Gadsden County, Florida\*

Hardee County, Florida\*

Nassau County, Florida\*

Wakulla County, Florida\*

##### ***School Board Experience***

Alachua County District School Board\*

Clay County District School Board\*

##### ***Other Governmental Entities***

Alachua County Housing Authority\*

Florida Gas Utility

Gainesville Regional Utilities

Office of the Auditor General of the State of Florida

University of Florida Division of Housing

University of Florida Division of Parking

Utilities Commission of New Smyrna Beach, Florida

**\*OMB Circular A-133 or Uniform Guidance Single Audits and/or Florida Single Audits  
(E)—Electric (G)—Natural Gas (W)—Water (S)—Sewer**

# Ronald D. Whitesides, CPA

Audit Partner

Chair of Audit Department

Member of Quality Control Team

Member of Concurring Review Team

## EXPERIENCE SERVING CLIENTS

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### Non-Profit Experience

Alliance for Economic Development, Inc.  
American Orchid Society, Inc.  
Bates Realities - HUD Project  
Council for Economic Outreach, Inc.  
Cris Collinsworth Foundation  
FICPA Education Foundation, Inc.  
FICPA Political Action Committee, Inc.  
Florida Association of Court Clerks, Inc.  
Florida Farm Bureau Federation and Subsidiaries  
Florida Institute of Certified Public Accountants, Inc.  
Florida Leadership and Educational Foundation, Inc.  
Florida Rural Legal Services, Inc.  
Florida State University Medical Facility Practice Plan, Inc.  
Gainesville Area Chamber of Commerce, Inc.  
Gainesville Golf and Country Club  
Meridian Behavioral Healthcare, Inc. and Affiliates  
National Center for Construction Education and Research  
New Horizons Properties  
Oak Hall Private School, Inc.  
Ronald McDonald House of Gainesville, Inc.  
Santa Fe College Foundation  
St. Johns River State College Foundation  
Southeast Tissue Alliance, Inc.  
Southern Legal Counsel, Inc.  
Three Rivers Legal Services, Inc.  
University of Florida College of Nursing Faculty Practice Association, Inc.  
University of Florida College of Veterinary Medicine, Inc.  
University of Florida Department of Housing  
University of Florida Faculty Association, Inc.  
University of Florida Law Center Association, Inc.  
University of Florida Tissue Bank  
University of Florida Transportation and Parking Services

### Other Experience

Applied Management Consulting, Inc.  
Applied Technology and Management, Inc.  
Family Center Condominium Association, Inc.  
Gulf Construction Services, L.P.  
Jones, Edmunds and Associates, Inc.  
Loncala, Incorporated  
Medical Arts Condominium Association, Inc.  
M.M. Parrish Construction Company, Inc.  
Parrish Construction Group, Inc.  
Smith and Gillespie Engineers, Inc.  
Tallahassee Diagnostic Imaging Center Partnership  
Trade-PMR, Inc.

### Utility Experience

City of Alachua, Florida (E, W, S)  
City of Atlantic Beach, Florida (W, S)  
City of Bartow, Florida (E, W, S)  
City of Fernandina Beach, Florida (W, S)  
City of Fort Meade, Florida (E, G, W, S)  
City of Green Cove Springs, Florida (E, W, S)  
City of Jacksonville Beach, Florida (E, G, W, S)  
Kissimmee Utility Authority (E)  
City of Lake City, Florida (G, W, S)  
City of Mount Dora, Florida (E, W, S)  
City of Neptune Beach, Florida (W, S)  
City of Newberry, Florida (E, W, S)  
Florida Gas Utility (G)  
Gainesville Regional Utilities, Florida (E, G, W, S)  
Glades Electric Cooperative, Inc. (E)  
Nassau County, Florida (W, S)  
Peace River Electric Cooperative, Inc. (E)  
Town of Orange Park, Florida (W, S)  
Utilities Commission of New Smyrna Beach, Florida (E, W, S)  
Withlacoochee River Electric Cooperative, Inc. (E)

### Health Care Experience

Bridgeway Center, Inc.  
Central Florida Health Care, Inc.\*  
Citrus Memorial Hospital  
District 3 Community Health Purchasing Alliance, Inc.  
Family Practice Medical Group, Inc.  
Florida State University Medical Facility Practice Plan, Inc.  
Marion-Citrus Mental Health Centers, Inc.\*  
Mental Health Services, Inc.\*  
Meridian Behavioral Healthcare, Inc.\*  
North Florida Regional Freestanding Surgery Center, L.P.  
North Florida Regional GI Center, L.P.  
Rural Health Care, Inc.\*  
Southeast Tissue Alliance, Inc.  
University of Florida College of Dentistry  
University of Florida College of Nursing  
University of Florida Tissue Bank, Inc.

**\*OMB Circular A-133 or Uniform Guidance Single Audits and/or Florida Single Audits  
(E)—Electric (G)—Natural Gas (W)—Water (S)—Sewer**

# Ronald D. Whitesides, CPA

## CPE Credits

Mr. Whitesides is in full compliance with the continuing educational requirements set forth under U.S. Government Accountability Office (GAO), *Government Auditing Standards*. A list of the relevant continuing professional education for the past three years follows:

### 2021

- ▶ The National Underwriter Company – Social Security 101
- ▶ BOD USA Launching an Advisory Services Practice
- ▶ BDO USA Yellow Book Update and Practice Issues
- ▶ BDO USA General Day 1 Intro to DEI as a Bus Enable
- ▶ BDO USA General Day 2 Session
- ▶ BDO Pulse of the Managing Partner
- ▶ BDO USA GASB Update and Practice Issues
- ▶ BDO USA Closing Keynote
- ▶ FGFOA Redefining Your Organization for Performance Excellence after COVID-19
- ▶ FGFOA GASB Hot Topics
- ▶ FGFOA GASB Update
- ▶ FGFOA Common Audit Findings
- ▶ FGFOA Introduction to Governmental Accounting
- ▶ FGFOA You've Issued Debt Now What? Post Issuance Disclosure
- ▶ FGFOA Auditor General and Department of Financial Services Update
- ▶ FGFOA Creating Efficiencies for Internal Audits
- ▶ FGFOA Lies, Lies & Economic Forecasts
- ▶ FGFOA Legislative Update
- ▶ FGFOA Financial Reporting Complexities in Local Governments
- ▶ FGFOA Legal Aspects of Work from Home Programs
- ▶ BDO USA NFP 2021 Conference
- ▶ Surgent McCoy CPE Florida Ethics for CPAs

### 2020

- ▶ PGC Winter CPE
- ▶ PGC ASC 606 Training
- ▶ COVID-19 How Non-Profits are Adapting to Change
- ▶ COVID-19 Everything You Need to Know About FEMA Grants and Preventing Inspector General Findings
- ▶ GAQC Annual Update Webcast
- ▶ Applying the New Lease Accounting Standard
- ▶ A Digitally Driven Firm (Information Technology)
- ▶ IPA Panel General Session Day Two
- ▶ Ensuring Engagement Quality When Performing SSARS Engagement
- ▶ Practice Issues Under ASC 606 Revenue Contracts with Customers
- ▶ Variable Interest Entities and Consolidation Matters Practice Issues
- ▶ 2018 Yellow Book What you Need to Know
- ▶ What the Heck is EOS
- ▶ Business Combinations Practice Issues
- ▶ Independence Update
- ▶ Assurance Practice Leaders Meeting
- ▶ Government Accounting for Debt Transactions
- ▶ CaseWare Fundamentals
- ▶ Employee Benefit Plan Audit Update
- ▶ Managing the Audit Process
- ▶ CARES Act Essentials
- ▶ Evolving Your Remote Audit Practices to Get Ahead in a Changing World
- ▶ Risk Assessment and Internal Controls

### 2019

- ▶ GAQC Annual Update Webcast
- ▶ PGC – Ethics Protecting the Integrity of Florida
- ▶ FGFOA Annual Conference – GASB Update
- ▶ FGFOA Annual Conference – GASB Hot Topics
- ▶ FGFOA Annual Conference – Opening General Session 7 Keys to Success
- ▶ FGFOA Annual Conference – GASB 87 Deep Dive
- ▶ FGFOA Annual Conference – State Compliance for Local Government Sector
- ▶ FGFOA Annual Conference – Bond Issuance Focus Accounting and Best Practice
- ▶ EBP Training Summer Session
- ▶ PGC Summer CPE



## MEAGAN G. CAMP, CPA

Audit Senior Manager

Member of Concurring Review Team

**PURVIS  
GRAY**

### CONTACT INFORMATION

Tallahassee, Florida

(850) 224-7144

[mcamp@purvisgray.com](mailto:mcamp@purvisgray.com)

### PROFILE

#### Education

Valdosta State University

2011, BBA, Accounting and Finance

#### Professional Credentials

CPA Certificate – AC54745 (FL)

CPA Certificate – CPA032868 (GA)

Member AICPA, FICPA, FGFOA

FICPA Women in Leadership Committee –  
2017-2021

Speaker Subcommittee – Member

Mentoring Subcommittee – Chair

Networking Subcommittee – Member

FICPA Young CPAs Committee –  
2018-2020

#### Previous Employers

Thomas, Howell, Ferguson, 2012-2016

Sanders, Holloway and Ryan, 2016-2017

**Years in Accounting: 10**

**Years with Firm: 4**

### SPEAKER/INSTRUCTOR

*Introduction to IDEA: Using CAATs to Perform Audits*

*Title IV-D Introduction and AUP Basics*

*CaseWare Fundamentals*

*Understanding Your Cost of Power Adjustment*

*GASB Update*

### EXPERIENCE SERVING CLIENTS

#### Governmental Experience

##### **Municipalities**

City of Jacksonville Beach, Florida\*

City of Live Oak, Florida \*

City of Tallahassee, Florida\*##

##### **Counties**

Alachua County, Florida\*

Gadsden County, Florida\*

Nassau County, Florida\*

##### **School Board and Charter School Experience**

Jefferson County School Board (Accounting/Consulting)

Leon County School Board

Wakulla Christian School#

##### **Other Governmental Entities**

Northwest Florida Water Management District\*

First Florida Governmental Finance Commission#

Florida Court Clerks and Comptrollers, and State Department of Revenue#

Sunshine State Governmental Finance Commission#

##### **Non-Profit Experience**

America's Second Harvest of the Big Bend\*##

Boys' Choir of Tallahassee, Inc.

Christina Noble Children's Foundation

Council on Culture and Arts, Inc.#

Early Learning Coalition of the Big Bend#

Florida Association of Court Clerks, Inc.

Florida Forestry Association, Inc.#

Florida Forestry Association Education Foundation#

Florida Police Chiefs Association, Inc.#

Florida Police Chiefs Foundation#

Florida Society of Association Executives, Inc.#

FSU Education Research Foundation#

Leon Advocacy and Resource Center, Inc.#

Lighthouse of the Big Bend, Inc.#

Northwest Regional Data Center

Seminole Boosters, Inc.#

Tallahassee Chamber of Commerce, Inc.#

United Way of the Big Bend, Inc.#

Visit Florida#

# Meagan G. Camp, CPA

Audit Senior Manager

## EXPERIENCE SERVING CLIENTS

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### Utility Experience

Choctawatchee Electric Cooperative, Inc. (E)  
City of Jacksonville Beach, Florida\* (E, G, W, S)  
City of Live Oak, Florida \* (W, S)  
City of Tallahassee Utilities, Inc. # (E, G, W, S)  
Gulf Coast Electric Cooperative (E)  
Northwest Florida Water Management District\* (W)  
Talquin Electric Cooperative, Inc. (E, W, S)

### Employee Benefit Plan Experience

AIPSO#  
Florida Sheriffs Multiple Employers' Trust# (H&W)  
Florida Sheriffs Risk Management Fund#(H&W)  
Louisiana Clerks of Court Insurance Trust#(H&W)  
Tallahassee Orthopedic Clinic, Inc., 401 (k) Plan#  
Tallahassee Primary Care Associates, 401 (k) Plan#

### Other Experience

American Guaranty Fund Group#  
Ask Gary Insurance Company#  
Culpepper Construction, Inc.#  
Envision Credit Union#  
First Protective Insurance Company#  
First Protective Insurance Group (Holding Company)#  
Florida Automobile Joint Underwriting Association#  
Florida Insurance Guaranty Association#  
Florida Workers' Compensation Insurance Guaranty Association#  
Forestech, Inc.#  
FSU Magnet Research and Development Lab#  
New Jersey Insurance Underwriting Association#  
Snelgrove Surveying and Mapping, Inc.#  
Southern Fidelity Insurance Company#  
Southern Fidelity Insurance Group (Holding Company)#  
Southern Protective Insurance Company#  
Tallahassee-Leon Federal Credit Union#  
TMH Federal Credit Union#  
Touchstone Architecture, Inc.#

(E)—Electric (G)—Natural Gas (W)—Water (S)—Sewer

\*OMB Circular A-133 or Uniform Guidance Single Audits and/or Florida Single Audits

# Audits were performed while employed by another firm

# Meagan G. Camp, CPA

## CPE Credits

Ms. Camp is in full compliance with the continuing educational requirements set forth under U.S. Government Accountability Office (GAO), *Government Auditing Standards*. A list of the relevant continuing professional education for the past three years follows:

### 2021

- ▶ Purvis Gray Fox It Training
- ▶ FGFOA Historical Performance and the Impact of a Pandemic and Economic Lockdown
- ▶ FGFOA Providing Government Services in a Remote World
- ▶ FGFOA Annual Comprehensive Financial Report – Tips and Tricks to Ensure Timely & Accurate Reporting
- ▶ FGFOA Financial Reporting Complexities in Local Governments
- ▶ FSFOA GASB Update (Instructor)
- ▶ Surgent McCoy CPE Florida Ethics for CPAs (ETFL)
- ▶ BDO USA 2021 EBP Update Parts II, III, and IV
- ▶ BDO USA 2021 EBP Update Audits of Plans Subject to SEC Form 11-K Filing
- ▶ BDO USA ERISA Update
- ▶ BDO USA Yellow Book Update & Practice Issues
- ▶ BDO USA General Day 1 Intro to a Bus Enable HRCI 555109
- ▶ BDO USA Single Audit Surprises & Other Matters
- ▶ BDO USA Independence Update & Practice Issues
- ▶ BDO USA Impact of New ISQM Standards on Firms Systems of Quality Management
- ▶ BDO USA General Session Day Three
- ▶ BDO USA Adding Value to the Board Hot Topics in Governance
- ▶ BDO USA Troubled Debt Restructuring & Debt Modification
- ▶ BDO USA ASC 740 Accounting for Current Events and Other Practice Matters

### 2020

- ▶ 2020 Tax, Finance & Accounting and RUS Mid-Year Update
- ▶ Purvis Gray ASC 606 Training
- ▶ FGFOA – Families First Coronavirus Response Act
- ▶ COVID-19 Everything you Need to Know About FEMA Grants and Preventing Inspector General Findings
- ▶ Applying the New Lease Accounting Standard
- ▶ IPA Panel General Session Day Two
- ▶ Variable Interest Entities and Consolidation Matters Practice Issues
- ▶ Ensuring Engagement Quality When Performing SSARS Engagement
- ▶ Practice Issues Under ASC 606 Revenue Contracts With Customers
- ▶ EBP Audit and Accounting Update Preparing for 2020 EBP Busy Season
- ▶ Independence Update
- ▶ Non-Profit Accounting Update
- ▶ Current Issues in Pension and OPEB Accounting
- ▶ Managing the Audit Process
- ▶ GASB 87 Practical Implications
- ▶ Single Audit and Yellow Book Update
- ▶ Risk Assessment and Internal Controls
- ▶ Emergency Management Preparing Documentation for FEMA Reimbursements
- ▶ 2020 Nonprofit and Education Government and Healthcare Industry Conference – General Session Day
- ▶ GASB Pension Plans
- ▶ GASB 84 Fiduciary Activities

### 2019

- ▶ FGFOA Annual Conference – GASB Update
- ▶ FGFOA Annual Conference – GASB Hot Topics
- ▶ FGFOA Annual Conference – Opening General Session 7 Keys to Success
- ▶ FGFOA Annual Conference – GASB 87 Deep Dive
- ▶ FGFOA Annual Conference – State Compliance for Local Governments
- ▶ FGFOA Annual Conference – Robotic Process Automation in the Government Sector
- ▶ FGFOA Annual Conference – Accounting and Auditing for Estimates
- ▶ FGFOA Annual Conference – The Internal Audit Function
- ▶ FGFOA Annual Conference – Popular Reporting
- ▶ FGFOA Annual Conference – Year-end Financial Reporting Considerations
- ▶ FGFOA Annual Conference – Lessons Learned Control Deficiencies
- ▶ FSFOA Annual Conference – TRIM Update and E Trim
- ▶ FSFOA Annual Conference – FEMA Reimbursement
- ▶ FSFOA Annual Conference – School Safety Report
- ▶ FSFOA Annual Conference – DOE Policy and Budget Update
- ▶ FSFOA Annual Conference – Economic Update
- ▶ FSFOA Annual Conference – Risk Assessment
- ▶ FSFOA Annual Conference – GASB 84 Implementation





# MICHAEL S. SANDSTRUM, CPA, CISA, CISM, CITP, CGMA, CDPSE

IT Director

PURVIS  
GRAY

## CONTACT INFORMATION

[msandstrum@purvisgray.com](mailto:msandstrum@purvisgray.com)

## PROFILE

### Education

Auburn University  
MBA (Graduated with Honors)

Wichita State University  
Bachelor of Business Administration in  
Accounting

### Professional Credentials

CPA Certificate - AC39388  
Certified Information Systems Auditor  
(CISA)  
Certified Information Security Manager  
(CISM)  
Certified Information Technology  
Professional (CITP)  
Certified Data Privacy Solutions  
Engineer (CDPSE)

### Professional Affiliations

American Institute of CPAs (AICPA)  
Florida Institute of CPAs (FICPA)  
Information Systems Audit and Control  
Association (ISACA)

### Previous Employers, 1977 – 2017

AuditWerx—Tampa, FL  
CS&L CPAs—Bradenton, FL  
Moody-Price, LLC—Baton Rouge, LA  
Heavy Quip—Jackson, MS  
Horton and Associates CPAs—Jackson, MS

### Years Auditing

Information Systems: 44

## PROFESSIONAL PROFILE

Michael has extensive experience in accounting, auditing, IT auditing, security management and consulting, both in public accounting and private industry sectors. He has held positions as a senior audit manager, tax manager, programmer, systems analyst, IT director, Chief Information Officer and IT Audit Manager. In addition, Michael has performed SOX internal auditing, managed numerous SOC 1 and SOC 2 engagements, as well as GAAS financial audit risk assessments.

## TECHNICAL EXPERTISE

|                                         |                                        |
|-----------------------------------------|----------------------------------------|
| SOC 2 Type 1 and Type 2                 | FISMA                                  |
| SOC 1 Type 1 and Type 2                 | NIST                                   |
| SOC Readiness Engagements               | Financial and IT Controls              |
| Client Development                      | HIPAA                                  |
| IT Security Controls Auditing           | GLBA                                   |
| IT SOX Auditing                         | COBIT                                  |
| Industry Experience:                    | Business Processes Analysis            |
| Healthcare                              | Data Mining & Reporting                |
| Local Governments                       | EDI/XML                                |
| Banking                                 | Cloud Integration                      |
| Claims Processing                       | Security Management & Compliance       |
| Manufacturing                           | IDEA Audit and Data Analytics Software |
| Distribution                            | AS/400                                 |
| Cloud Providers                         | Linux                                  |
| Data Centers                            | Mainframe                              |
| Non-Profit                              | Windows                                |
| Information Security Consulting Privacy | SQL                                    |
| Risk Assessments                        | CaseWare Audit Software                |
| Agreed Upon Procedures                  | Citrix                                 |

# Michael S. Sandstrum, CPA

## CPE Credits

Mr. Sandstrum is in full compliance with the continuing educational requirements set forth under U.S. Government Accountability Office (GAO), *Government Auditing Standards*. A list of the relevant continuing professional education for the past three years follows:

### 2021

- ▶ Purvis Gray Lunch & Learn Series Depreciation
- ▶ Surgent McCoy CPE Florida Ethics for CPAs (ETFL)
- ▶ ISACA Mitigating the Security Risks of a Remote Workforce During a Crisis
- ▶ ISACA Risk Management in Action 4 Key Pillars for Achievable Resilience
- ▶ ISACA Data Protection for Cloud-First Organizations
- ▶ AICPA Town Hall Series
- ▶ AICPA Introduction to the Cybersecurity Maturity Model Certification Framework
- ▶ BDO USA ERISA Update
- ▶ Yellow Book Update and Practice Issues
- ▶ BDO USA General Day 1, Day 2, and Day 3 Sessions
- ▶ BDO USA Future of Audit is Here Part I Transform Audit with Digital Suite of Tools
- ▶ BDO USA Top I Audit Risks
- ▶ BDO USA Adding Value to the Board Hot Topics in Governance
- ▶ BDO USA Single Audit Surprises and Other Matters
- ▶ BDO USA ASC 740 Accounting for Current Events and Other Practice Matters
- ▶ BDO USA Closing Keynote
- ▶ AICPA Town Hall Series
- ▶ FGFOA GASB Update
- ▶ FGFOA Economic Update Planning for a Post Pandemic Futures
- ▶ FGFOA Common Audit Findings
- ▶ FGFOA Introduction to Governmental Accounting
- ▶ FGFOA Auditor General and Department of Financial Services Update
- ▶ FGFOA Lies, Lies & Economic Forecasts
- ▶ FGFOA Legislative Update
- ▶ FGFOA Creating Efficiencies for Internal Audits
- ▶ FGFOA Providing Government Services in a Remote World
- ▶ FGFOA Financial Reporting Complexities in Local Governments
- ▶ FGFOA Debt Financing Options Used for Public Infrastructure
- ▶ FGFOA Disaster Recovery How Do You Solve the Hurricane Problem
- ▶ FGFOA Disaster Recovery Accounting & Single Audit Aspects
- ▶ FGFOA Florida Open Financial Statement System Getting Ready for 2022
- ▶ AICPA Town Hall Series

### 2020

- ▶ PGC ASC 606 Training
- ▶ ISACA Virtual Summit Future of Data Protection, Privacy and IT Risk Management
- ▶ Risky Business Conduction Remote Audits in Uncertain Times
- ▶ Who's in Your Cloud? How Privileged Access Controls are Leaving you Exposed
- ▶ Stopping Ransomware and Advanced Malware Threats the Current Scope of These Threats
- ▶ COVID-19 CFO Professional Judgment in Volatile and Uncertain Times
- ▶ IA Webinar Series Course 2 Evaluating Compliance and Anti-Fraud Programs
- ▶ The Human Factor Malicious Insiders vs. Negligent End Users
- ▶ Government Accounting for Debt Transactions
- ▶ CaseWare Fundamentals
- ▶ Employee Benefit Plan Audit Update
- ▶ Privacy Management Framework A Tool for Developing your Privacy Program
- ▶ CARES Act Essentials
- ▶ Risk Assessment and Internal Controls

### 2019

- ▶ PGC – Ethics Protecting the Integrity of Florida
- ▶ PGC Accounting & Auditing Updates
- ▶ The CISO of the Future
- ▶ Understanding Robotic Process Automation
- ▶ Module 3 Data Driven Decision Making
- ▶ PGC Summer CPE
- ▶ PGC Fall CPE



## SEAN P. TONER, CPA

Audit Supervisor

PURVIS  
GRAY

### CONTACT INFORMATION

Tallahassee, Florida  
(850) 224-7144  
[stoner@purvisgray.com](mailto:stoner@purvisgray.com)

### PROFILE

#### Education

Florida State University  
2017, BS, Accounting and Finance

#### Professional Credentials

CPA Certificate – AC53807  
Member AICPA, FICPA, and FGFOA

Years in Accounting: 5

Years with Firm: 5

### EXPERIENCE SERVING CLIENTS

#### Governmental Experience

##### Counties

Gadsden County, Florida, Board of County Commissioners  
Gadsden County, Florida, Clerk of the Circuit Court  
Gadsden County, Florida, Property Appraiser  
Gadsden County, Florida, Sheriff  
Gadsden County, Florida, Supervisor of Elections  
Nassau County, Florida, Clerk of the Circuit Court  
Nassau County, Florida, Property Appraiser  
Nassau County, Florida, Sheriff  
Nassau County, Florida, Supervisor of Elections  
North Florida Water Management District

##### Municipalities

City of Fernandina Beach, Florida  
City of Jacksonville Beach, Florida  
City of Live Oak, Florida

##### Other Governmental Entities

Dog Island Conservation District

##### School Board and Charter School Experience

Leon County District School Board

##### Non-Profit Experience

Association for Institutional Research  
CareerSource Florida, Inc.  
Florida Association of Court Clerks  
Florida Coalition for Children, Inc.  
Florida Independent Auto Dealers Association  
Florida Individual Health Reinsurance Program  
Florida Outdoor Advertising Association  
Florida Small Employer Health Reinsurance Program  
United Way of Florida, Inc.

##### Utility Experience

Choctawhatchee Electric Cooperative (E)  
City of Jacksonville Beach, Florida\* (E, G, W, S)  
City of Live Oak, Florida \* (W, S)  
Gulf Coast Electric Cooperative (E)  
Suwannee Valley Electric Cooperative, Inc. (E)  
Talquin Electric Cooperative (E, W, S)

\*OMB Circular A-133 or Uniform Guidance Single Audits and/or Florida Single Audits  
(E)—Electric (G)—Natural Gas (W)—Water (S)—Sewer

# Sean P. Toner, CPA

## CPE Credits

Mr. Toner is in full compliance with the continuing educational requirements set forth under U.S. Government Accountability Office (GAO), *Government Auditing Standards*. A list of the relevant continuing professional education for the past three years follows:

### 2021

- ▶ Purvis Gray Fox It Training
- ▶ 2021 EBP Update Parts II, III, and IV
- ▶ FGFOA GASB Hot Topics
- ▶ FGFOA GASB Update
- ▶ FGFOA Modernizing for Digital Transformation
- ▶ FGFOA Opening General Session
- ▶ FGFOA Introduction to Governmental Accounting
- ▶ FGFOA Auditor General and Department of Financial Services Update
- ▶ FGFOA Common Audit Findings
- ▶ FGFOA Lies, Lies & Economic Forecasts
- ▶ FGFOA Providing Government Services in a Remote World
- ▶ FGFOA Creating Efficiencies for Internal Audits
- ▶ FGFOA Financial Reporting Complexities in Local Governments
- ▶ FGFOA Comprehensive Annual Financial Report; Tips and Tricks to Endure Timely & Accurate Reporting
- ▶ FGFOA Retirement Plans Best Practices
- ▶ FGFOA Disaster Recovery Accounting & Single Audit Aspects
- ▶ BDO USA NFP 202 Conference
- ▶ BDO USA GASB 94 Public Private Partnerships & Availability Pay Arrangements
- ▶ Surgent McCoy CPE Florida Ethics for CPAs

### 2020

- ▶ CiviTek AUP Training Webinar
- ▶ Applying the New Lease Accounting Standard
- ▶ ASC 740 Tax Reform and CARES Act
- ▶ Variable Interest Entities and Consolidation Matter Practice Issues
- ▶ Ensuring Engagement Quality When Performing SSARS Engagement
- ▶ Practice Issues Under ASC 606 Revenue Contracts with Customers
- ▶ 2018 Yellow Book What you Need to Know
- ▶ EBP Audit and Accounting Update Preparing for 2020 EBP Busy Season
- ▶ Business Combinations Practice Issues
- ▶ Independence Update
- ▶ Non-Profit Accounting Update
- ▶ Excel Tips and Tricks
- ▶ Government Accounting for Debt Transactions
- ▶ CaseWare Fundamentals and Instructor Credit
- ▶ Emergency Management Preparing Documentation for FEMA Reimbursements
- ▶ GASB Pension Plans
- ▶ GASB 84 Fiduciary Activities
- ▶ Common Financial Reporting Deficiencies
- ▶ Business-Type Activities and Proprietary Funds

### 2019

- ▶ PGC – Ethics Protecting the Integrity of Florida
- ▶ PGC – Accounting & Auditing Updates
- ▶ PGC – Major Program Determination and an Overview OMB Compliance Supplement
- ▶ PGC – Overview of Single Audit Reporting Requirements and Available Resources
- ▶ PGC – GAS What you Need to Know to be Compliant
- ▶ PGC – Auditing Accounts Payable and Accrued Expenses
- ▶ PGC – Auditing Prepaid
- ▶ PGC – Auditing Accounting Estimates II Issuer Focused
- ▶ PGC – Understanding and Testing Compliance Requirements
- ▶ PGC – Auditing Accounting Estimates I
- ▶ PGC – Audit Data Analytics A Primer
- ▶ PGC – Audit Determination and Consultations
- ▶ PGC – Executive Roadmap to Fraud Prevention and Internal Control
- ▶ PGC – Detecting Fraud I Organizations
- ▶ PGC Fall CPE – Government Accounting and Not-for-Profit Update
- ▶ PGC Fall CPE – Let's Look at Leases – GASB 87
- ▶ PGC Fall CPE – Economic Update
- ▶ PGC Fall CPE – State Legislative Update

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## 9—Experience

### Governmental Experience

Audits we currently or recently have performed for governmental-type clients are listed below. These audits were conducted in accordance with *Government Auditing Standards* and Federal and State Single Audits were performed, when applicable. **(ACFR)** Indicates inclusion of preparation of an Annual Comprehensive Financial Report in the engagement.

#### Municipalities

- ▶ City of Alachua **(ACFR)**
- ▶ City of Atlantic Beach
- ▶ City of Bartow
- ▶ City of Belleview
- ▶ City of Bushnell **(ACFR)**
- ▶ Town of Bronson
- ▶ City of Cedar Key
- ▶ City of Dade City
- ▶ City of Deltona **(ACFR)**
- ▶ City of Eustis **(ACFR)**
- ▶ City of Fernandina Beach **(ACFR)**
- ▶ City of Fort Meade
- ▶ City of Frostproof
- ▶ City of Gainesville **(ACFR)**
- ▶ City of Jacksonville Beach **(ACFR)**
- ▶ City of Kissimmee **(ACFR)**
- ▶ City of Live Oak
- ▶ City of Mount Dora **(ACFR)**
- ▶ City of Newberry **(ACFR)**
- ▶ City of Neptune Beach
- ▶ City of Ocala **(ACFR)**
- ▶ Town of Orange Park
- ▶ City of Oviedo **(ACFR)**
- ▶ City of Sarasota **(ACFR)**
- ▶ City of St. Cloud **(ACFR)**
- ▶ City of Williston
- ▶ City of Winter Springs



#### Counties

- ▶ Alachua County **(ACFR)**
- ▶ Bradford County
- ▶ DeSoto County
- ▶ Gadsden County
- ▶ Marion County **(ACFR)**
- ▶ Nassau County **(ACFR)**



#### Community Redevelopment Agencies (CRAs)

- ▶ City of Alachua
- ▶ City of Bartow
- ▶ City of Belleview
- ▶ City of Dade City
- ▶ City of Deltona
- ▶ City of Eustis
- ▶ City of Fort Meade
- ▶ City of Gainesville
- ▶ City of Jacksonville Beach
- ▶ City of Kissimmee
- ▶ City of Live Oak
- ▶ City of Ocala
- ▶ City of Oviedo
- ▶ City of Sarasota
- ▶ City of Williston

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## School Boards

- ▶ Alachua County District School Board
- ▶ Charlotte County District School Board
- ▶ Citrus County District School Board
- ▶ Clay County School Board
- ▶ Hernando County School Board **(ACFR)**
- ▶ Lake County District School Board **(ACFR)**
- ▶ Leon County School Board
- ▶ Levy County District School Board
- ▶ Marion County School Board **(ACFR)**
- ▶ The Villages Charter School, Inc.



## Water, Sewer, And Gas Utilities

- ▶ City of Alachua
- ▶ City of Atlantic Beach
- ▶ City of Bartow
- ▶ City of Belleview
- ▶ Town of Bronson
- ▶ City of Bushnell
- ▶ City of Cape Coral
- ▶ DeSoto County
- ▶ City of Eustis
- ▶ City of Fernandina Beach
- ▶ Florida Gas Utility, Gainesville
- ▶ City of Fort Meade
- ▶ Gainesville Regional Utilities
- ▶ City of Green Cove Springs
- ▶ Hernando County
- ▶ City of Jacksonville Beach
- ▶ City of Lake City
- ▶ City of Lake Wales
- ▶ Lehigh Acres Municipal Services Improvement District
- ▶ City of Live Oak
- ▶ City of Mount Dora
- ▶ Nassau County
- ▶ City of Neptune Beach
- ▶ City of Newberry
- ▶ North Sumter County Utility Dependent District
- ▶ City of Oviedo
- ▶ City of Ocala
- ▶ Peace River Manasota Regional Water Supply Authority
- ▶ City of Sarasota
- ▶ City of St. Cloud
- ▶ Talquin Electric Cooperative, Inc., Quincy
- ▶ Town of Orange Park
- ▶ Utilities Commission New Smyrna Beach
- ▶ Village Center Community Development District & Affiliates, The Villages
- ▶ City of Williston
- ▶ Withlacoochee Regional Water Supply Authority, Dade City



# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## Special Districts

- ▶ Alachua County Library District
- ▶ Bartow Municipal Airport Development Authority
- ▶ Dog Island Conservation District
- ▶ Florida Gas Utility
- ▶ Florida Municipal Power Agency
- ▶ Gainesville-Alachua County Regional Airport Authority
- ▶ Kissimmee Utility Authority
- ▶ Lake Wales Airport Authority
- ▶ Lakewood Ranch Community Development Districts
- ▶ Lakewood Ranch Inter-District Authority
- ▶ Lehigh Acres Municipal Services Improvement District
- ▶ North Sumter County Utility Dependent District
- ▶ Northwest Florida Water Management District
- ▶ Peace River Manasota Regional Water Supply Authority
- ▶ The Villages Community Development Districts
- ▶ Withlacoochee Regional Water Supply Authority

## Defined Benefit Plans

- ▶ Munroe Regional Medical Pension Plan
- ▶ Florida Pest Control and Chemical Company, Inc. Pension Plan and Trust
- ▶ Clay Electric Cooperative Retiree Welfare Plan
- ▶ Kissimmee Utility Authority Pension Trust Fund
- ▶ City of Atlantic Beach, Florida General Employees' Retirement Plan
- ▶ City of Atlantic Beach, Florida Police Retirement Plan
- ▶ City of Bartow, Florida General Employees' Retirement Plan
- ▶ City of Deltona, Florida Firefighters' Pension Plan
- ▶ City of Deltona, Florida General Employees' Pension Plan
- ▶ City of Fernandina Beach, Florida General Employees' Pension Plan
- ▶ City of Fernandina Beach, Florida Police Officers' and Firefighters' Pension Plan
- ▶ City of Fort Meade, Florida General Employees' Pension Plan
- ▶ City of Fort Meade, Florida Police Officers' Pension Plan
- ▶ City of Fort Meade, Florida Firefighters' Pension Plan
- ▶ City of Gainesville Employees' Pension Plan
- ▶ City of Gainesville Police Officers' and Firefighters' Consolidated Pension Plan
- ▶ City of Gainesville Other Postemployment Benefits (OPEB) Plan
- ▶ City of Jacksonville Beach, Florida General Employees' Retirement System
- ▶ City of Jacksonville Beach, Florida Police Officers' Retirement System
- ▶ City of Jacksonville Beach, Florida Fire Fighters' Retirement System
- ▶ City of Live Oak, Florida Firefighter Pension Trust Fund
- ▶ City of Mount Dora, Florida Police Officers' Retirement Plan
- ▶ City of Mount Dora, Florida Firefighters' Retirement Plan
- ▶ City of Mount Dora, Florida General Retirement Plan
- ▶ City of Neptune Beach, Florida Police Officers' Pension Plan
- ▶ City of Ocala, Florida Police Officers' Pension Plan
- ▶ City of Ocala, Florida Firefighters' Pension Plan
- ▶ City of Orange Park, Florida Police Officers' Pension Plan
- ▶ City of Orange Park, Florida Firefighters' Pension Plan
- ▶ City of Orange Park, Florida General Employees' Pension Plan
- ▶ City of St. Cloud, Florida General Employees' Retirement Plan
- ▶ City of St. Cloud, Florida Police Officers' Retirement Plan
- ▶ City of St. Cloud, Florida Firefighters' Retirement Plan
- ▶ City of Sarasota, Florida General Employees' Pension Plan



# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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## Single Audit Experience

### *Federal Award Compliance – Uniform Guidance*

If a Federal or State Single Audit is required (generally total federal or state grant expenditures exceeding \$750,000 during the audit period), the auditor is responsible for testing compliance with all major federal and state award programs. If a Federal or State Single Audit is required, each major program will be tested for the compliance requirements applicable to that program. We are up to date on the new Uniform Guidance associated with Federal Grants, including the updated CARES Act compliance regulations, and we are continuously reviewing updates to the American Rescue Plan Act.

As a large audit firm with significant governmental experience, members of your audit team have participated in single audits of countless federal and state grant programs. Many of our single audits have included grants from the following Federal and State Departments, including numerous programs within each.



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### Federal Grant Programs

Federal Communications Commission  
Federal Emergency Management Agency  
National Endowment for the Arts  
National Endowment for the Humanities  
National Science Foundation  
US Department of Agriculture  
US Department of Agriculture Food and Nutrition Service  
US Department of Aviation Administration  
US Department of Children and Families  
US Department of Commerce  
US Department of Commerce NOAA  
US Department of Defense  
US Department of Economic Opportunity  
US Department of Education  
US Department of Education of Elementary Secondary Education  
US Department of Election Assistance Commission  
US Department of Energy  
US Department of Environmental Protection Agency  
US Department of Federal Highway Administration  
US Department of General Services Administration  
US Department of Health and Human Services  
US Department of Homeland Security  
US Department of Housing and Urban Development  
US Department of Interior  
US Department of Justice  
US Department of Labor  
US Department of Treasury  
US Department of Transportation

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### State Grant Programs

Clean Florida Council  
Executive Office of the Governor  
Office of Early Learning  
State Courts System  
Florida Department of Agriculture and Consumer Services  
Florida Department of Children and Families  
Florida Commission on Tourism  
Florida Department of Community Affairs  
Florida Department of Corrections  
Florida Department of Economic Opportunity  
Florida Department of Elder Affairs  
Florida Department of Emergency Management  
Florida Department of Environmental Protection  
Florida Department of Fish and Wildlife Commission  
Florida Department of Health  
Florida Department of Health and Rehabilitative Services  
Florida Department of Highway Safety and Motor Vehicles  
Florida Department of Housing Finance Corporation  
Florida Department of Juvenile Justice  
Florida Department of Legal Affairs and Attorney General  
Florida Department of Library and Information Services  
Florida Department of Management Services  
Florida Department of Natural Resources  
Florida Department of State  
Florida Department of Transportation  
Florida Department of Workforce Innovation

We are members of the AICPA Governmental Audit Quality Center (GAQC) which offers various programs and certification in the Single Audit area. Several Purvis Gray staff have received Single Audit certifications which indicates their expertise in this area.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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## 10—Similar Engagements with Other Governmental Entities/References

Below are some of the most significant engagements our firm has performed in the last five years that are similar to the City:

### CITY OF JACKSONVILLE BEACH, FLORIDA

Ms. Ashlie Gossett, Finance Director  
11 North Third Street  
Jacksonville Beach, Florida 32250

(904) 247-6138  
[agossett@jaxbchfl.net](mailto:agossett@jaxbchfl.net)

**Date**—September 30, 1992 to Present

**Engagement Partner**—Ryan M. Tucker, CPA

**Engagement Senior Manager**—Meagan G. Camp, CPA

**Scope of Work**—Audit of all operations, including electric, water and wastewater utilities, natural gas utilities, and Single Audit of federal and state grant programs. Audits of city pension plans for fire, police, and general employees. Serves approximately 35,000 electric utility customers. Participates in the GFOA Certificate Program. Population (2020): 23,624

### GADSDEN COUNTY, FLORIDA

Ms. Helene Michaels  
PO Box 1799  
Quincy, Florida 32353

(850) 875-7063  
[helene@gadsdenclerk.com](mailto:helene@gadsdenclerk.com)

**Date**—September 30, 2010 to Present

**Engagement Partner**—Ryan M. Tucker, CPA

**Engagement Senior Manager**—Meagan G. Camp, CPA

**Scope of Work**—Audit of all Board of County Commissioners operations, including Single Audit of federal and state grant programs, and separate audits of the Constitutional Officers. Population (2020): 46,389

### CITY OF LIVE OAK, FLORIDA

Ms. Joanne Luther, Finance Director  
101 White Avenue SE  
Live Oak, Florida 32064

(386) 362-2276  
[jluther@cityofliveoak.org](mailto:jluther@cityofliveoak.org)

**Date**—September 30, 2012 to Present

**Engagement Partner**—Ryan M. Tucker, CPA

**Engagement Senior Manager**—Meagan G. Camp, CPA

**Scope of Work**—Audit of all operations, including water and wastewater utilities, natural gas utilities, and Single Audit of federal and state grant programs. Population (2020): 6,972

### LEON COUNTY SCHOOL BOARD

Ms. Katherine Sanders  
Director of Financial Services  
2757 West Pensacola Street  
Tallahassee, Florida 32304

(850) 487-7143  
[sandersk1@leonschools.net](mailto:sandersk1@leonschools.net)

**Date**—June 30, 2018 to Present

**Engagement Partner**—Ryan M. Tucker, CPA

**Engagement Senior Manager**—Meagan G. Camp, CPA

**Scope of Work**—Audit of the District's financial statements, including Single Audit of federal grant programs, and audit of the Internal Accounts.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## 11—Specific Audit Approach

### Audit Methodology



As required by audit standards, our audit methodology is a *risk-based approach*. This methodology focuses the audit resources on the areas where risks (i.e., of fraud, irregularities, financial statement errors) are most likely to occur. It emphasizes the “big picture” over the details.

The audit process can be further broken down into the following steps:



### Work Plan for the Annual Audits

This section describes the work plan for the year ending September 30, 2021, for the annual financial audit of the City. Upon being engaged as your auditors, we would immediately complete our formal due diligence/client acceptance procedures, execute an engagement letter, review the prior auditor’s workpapers after proper notification by the City, and schedule planning meetings with City management.

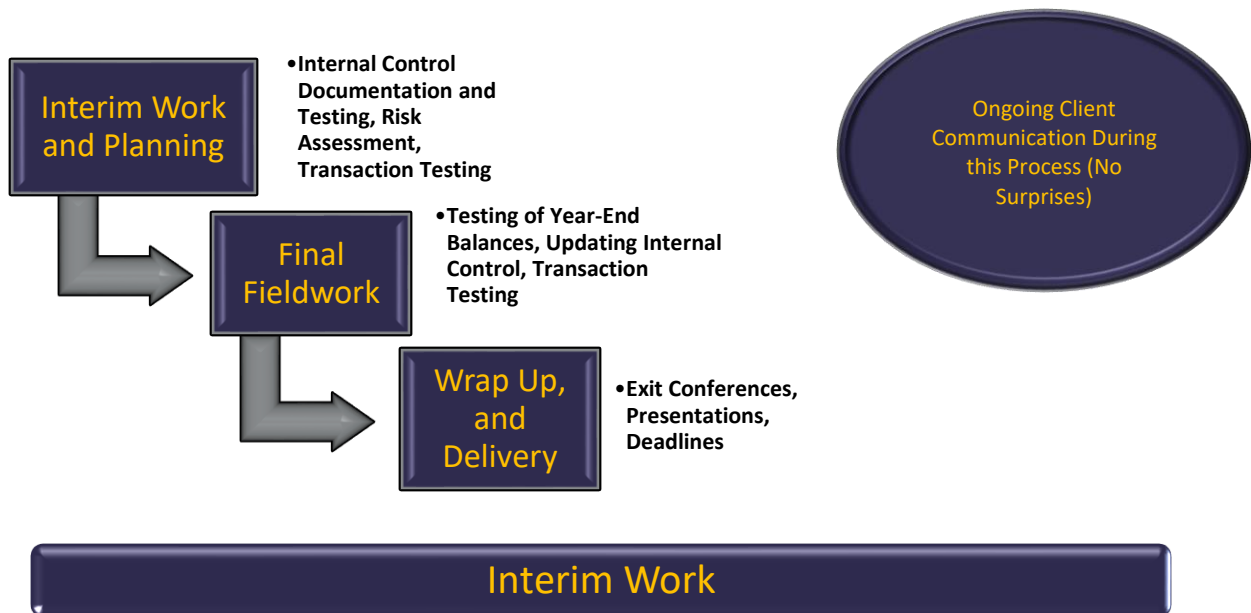
The purpose of these meetings are as follows:

- ▶ Confirm roles and expectations.
- ▶ Discuss specific accounting, financial reporting, and current year developments.
- ▶ Develop specific performance measures to ensure mutual understanding of the audit process.
- ▶ Develop timelines to confirm shared performance expectations for on-time deliverables.
- ▶ Request key financial reporting cycle and other permanent file documentation.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

Our work plan will be developed in coordination with your staff and will be modified where the audit objective can be achieved in a manner least intrusive to your operations. One of our firm's goals is to perform as much audit work as possible during interim fieldwork. This minimizes the pressure on your staff to maintain timetables and meet deadlines after year-end. In addition, it permits the earliest possible identification and resolution of complex accounting and auditing issues.

Due to the timing of the release of the RFP, interim fieldwork for fiscal year 2021 will be performed at a time that is suitable for both management and Purvis Gray. In subsequent fiscal years, we propose interim fieldwork would be completed in October following the fiscal year-end. **We fully intend and expect to meet all of your audit deadlines.** Our preliminary plan has been prepared as follows:



- ▶ A letter communicating the details of the audit plan for interim and year-end procedures will be provided to those charged with governance.
- ▶ Entrance conferences with the City's Manager/Finance Director and other key personnel, regarding the City's operations, audit assistance, and other pertinent items will be held in accordance with the proposed Scope of Services throughout the term of the audit.
- ▶ Immediately following the initial conference, the following elements of the work plan will be executed: Review the City's operating systems, budget, organizational charts, internal controls, data processing operations, financial reports, internal audit reports, Board minutes, resolutions, and regulatory correspondence, etc. Determine preliminary materiality limits and perform risk assessment procedures.
- ▶ Review the City's federal awards and state financial assistance. Identify major programs or projects and related compliance requirements, plan approach for internal controls, and compliance tests required by the Federal and State *Single Audit Acts*.
- ▶ Perform a review of the internal controls used in the computer environment related to financially significant systems. This review will be performed by individuals from our IT Department along with Audit Department personnel.
- ▶ Establish or revise estimated time requirements by entity and functional area following interim work performed.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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- ▶ Prepare preliminary audit programs based upon risk assessment procedures performed.
- ▶ Perform preliminary procedures (such as permanent file construction, review of prior year workpapers, verification of beginning balances, coordination of schedule preparation, confirmations, etc.).
- ▶ Perform interim fieldwork at a time agreed-upon with the City's staff.
- ▶ Perform preliminary analytical procedures to identify trouble areas and issues and resolve at earliest possible date.
- ▶ Initiate Single Audit procedures - internal control and compliance tests.
- ▶ Hold meetings, as applicable, to assess and discuss the impact of significant regulatory and accounting standard changes.
- ▶ Assist with year-end cutoff procedures (such as finalize confirmations, determine status of in-process construction) and observe taking of annual inventory, as deemed necessary.

## Final Fieldwork

- ▶ Hold pre-audit meeting with the City's management and other key personnel.
- ▶ Perform final year-end audit fieldwork, including sampling, vouching, internal control tests, compliance tests, and substantive tests, including Single Audits.
- ▶ Complete all audit fieldwork according to applicable timetable of each audit year.

## Wrap Up/Presentation

- ▶ Perform Purvis Gray's independent (in-house) reviews and post-fieldwork analytical review.
- ▶ Review the City's draft of financial statements, notes, and draft auditor's reports, and related letters.
- ▶ Hold preliminary exit conferences with the City's management and other key personnel and deliver preliminary draft auditor's reports and comments.
- ▶ Deliver final copies of independent auditor's reports on internal control and compliance after final exit conferences prior to June 30 in year one of the engagement.
- ▶ Present the final audited financial statements and related reports to the City Commission each year.

### A—Proposed Segmentation of the Engagement

The City audit will be segmented along fund lines and by cross-fund areas that are common to all funds. Cross-fund areas will include: cash and investments, accounts payable, payroll/benefits, budgets, capital assets, debt, Single Audit, pensions, and utility billing. The Single Audit will be conducted across all department grant programs/projects, and all grant revenues, receivables, and unearned revenues and expenditures.

Proper planning and communication is essential to an effective and efficient audit. Issues are identified, discussed, and resolved as early as possible. All members of the audit team and the firm are available to the City's management at all times throughout the process. Our audit approach utilizes substantive tests, compliance tests, tests of controls, and analytical procedures.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## B—Level of Staff

Estimated hours, by staffing level and segment, are as follows:

| Hours By<br>Segment | Interim | Final | Wrap Up | Total |
|---------------------|---------|-------|---------|-------|
| Partner             | 30      | 50    | 25      | 105   |
| Managers            | 50      | 80    | 20      | 150   |
| Supervisor          | 45      | 80    | 25      | 150   |
| Staff               | 70      | 120   | 20      | 210   |
| Clerical            | -       | -     | 25      | 25    |
|                     | 195     | 330   | 115     | 640   |

## C—Sample Size Methodology and Statistical Sampling

There are two possible approaches to audit sampling: non-statistical and statistical. Both of these approaches are capable of producing appropriate audit evidence, when properly applied. Statistical sampling will be used on these engagements and will be coordinated with other audit procedures to achieve audit objectives in the most effective and efficient manner possible. Statistical sampling will be used in relation to audit procedures for:

- ▶ Tests of Controls
- ▶ Substantive Tests of Transactions and Account Balances
- ▶ Tests of Compliance with Laws and Regulations
- ▶ Attribute Sampling

All sampling (including sample sizes) will be performed in accordance with auditing standards generally accepted in the United States of America, standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and Chapter 10.550, *Rules of the Auditor General*.

## D—Analytical Procedures

Analytical procedures will be used extensively on this engagement. Initial applications will be used in general planning to improve the firm's understanding of operations and to identify areas of increased risk and extended audit procedures. Analytical procedures will also be used to facilitate the development of the audit program.

During the audit fieldwork, analytical procedures will be used as substantive tests to significantly reduce or eliminate certain tests of details. Analytical procedures will be used in the following and other audit areas:

- ▶ Operating and Grant Revenues
- ▶ Payroll and Fringe Benefits
- ▶ Debt and Debt Service Expenditures
- ▶ Inventories
- ▶ Operating Expenses/Expenditures

## E—Approach to Auditing Internal Control Structure, Including IT General Controls

Auditing standards require auditors to obtain an understanding of internal control sufficient to assess the risk of material misstatement of the financial statements due to error or fraud, and to design the nature, timing, and extent of further audit procedures.

***We will perform audit procedures to obtain an understanding of the design and implementation of the City's key controls in each significant audit area.*** Understanding the key controls will include an extensive review and documentation of the City's control environment, risk assessment activities, information and communication systems, monitoring activities, and control activities.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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As part of understanding the control activities, we will identify significant classes of transactions and cycles and other areas with significant risks or fraud risks. Common areas identified include, but are not limited to, the following:

► *Significant Classes of Transaction and Cycles:*

- Cash
- Investments, Investment Compliance
- Utility Revenues – Billing, Accounts Receivable, Cash Receipts
- Grants Revenues and Expenditures – Accounts Receivable, Cash Receipts and Disbursements
- Accounts Payable and Expense/Expenditure – Purchasing, Cash Disbursements
- Payroll and Related Liabilities – Human Resources, Payroll Disbursements
- Capital Assets and Capital Outlay
- Debt Compliance

► *Other Areas with Significant Risks or Fraud Risks*

- Unusual Transactions
- Significant Estimates
- Subsequent Events
- Information Technology Risks

**For significant classes of transactions and cycles,** we will gain an understanding of the processes and controls over initiating, authorizing, recording, processing, reporting, and reconciling. We will:

- Request, obtain, and review available City policies and procedures, flowcharts, and other documentation.
- Review City-provided documentation against practice aids and best practices.
- Develop and update our business process and internal control narratives, flowcharts, checklists, and other documentation based on our review of City-provided documentation utilizing our practice aids.
- Meet with and interview key Financial Department personnel and department directors or staff of key offices and programs to further develop and update our understanding of the processes and controls to include:
  - Identify the key manual and automated controls.
  - Confirm with management that the key controls have been properly identified.
  - Evaluate whether the key controls are properly designed and implemented by performing audit procedures, including observation, inspection, performance, and confirmation to obtain audit evidence that the controls are properly designed and implemented.
  - Identify any weaknesses in the design or implementation.
- Discuss any weaknesses in internal control with management to confirm our understanding or to receive additional information or identify compensating controls, if any.
- Consider performing tests of controls (to test the operating effectiveness of the controls during the City's fiscal year) if controls have been properly designed and implemented.

**For significant risks and fraud risks,** we will identify the key controls, evaluate whether they have been properly designed and implemented, and design further audit procedures (tests of details) to specifically address those risks.



# INFORMATION TO BE INCLUDED IN THE PROPOSAL

**For information technology risks**, we will gain an understanding of the IT environment, including the Information Technology General Controls, which includes determining suitability of design and whether the control is implemented. The following are various types of IT General Controls that typically are evaluated as part of the financial audit process:

Entity Level Controls - IT Governance,  
Risk Management, and Information  
Security Training

Computer Operations - System  
Updates, Incident Reporting, and  
Information Security Monitoring

Third Party IT Providers Management  
and Assessment

Information Security - Network, Application and Data Access,  
Segregation of Duties, Network Perimeter Controls

Infrastructure and Application  
Change Management

Backup and Recovery - Disaster Recovery,  
Business Continuity Planning, Environmental Controls

Our IT Auditors will work with your IT professionals to evaluate the IT General Controls relevant to your financial applications that are key to the financial audit to advise and assist in the type, timing, and degree of testing performed by the audit team. This is usually accomplished through a questionnaire and checklist to be completed by your IT personnel followed up by interviews, inspection, and testing as deemed necessary by our IT Auditors. ***Additionally, it is not uncommon for our IT Auditors to offer valuable formal or informal recommendations to further mature and refine your IT General Controls as a result of this process.*** The familiarity we gain from completing this work, which is required for your financial audit, will also make us very familiar with your IT platforms, ERP, and all other aspects of your IT. This is helpful in the event that we may be of further service beyond the Financial Audit in any areas of IT consulting and Assessment services that we offer. Additionally, it will assist us in planning for the City's future implementation of GASB 96: Subscription-Based IT Arrangements.

## **F—Approach to be Taken in Determining Laws and Regulations**

For audits conducted in accordance with *Government Auditing Standards*, the auditor is required to test compliance with laws and regulations that would have a material effect on the City's financial statements. As such, we design our audit programs to ensure compliance with key laws and regulations such as:

- ▶ Budgetary Appropriation Limits
- ▶ Significant Debt Covenants
- ▶ Relevant Compliance Requirements of Major Programs Under the Single Audits
- ▶ Key Federal, State, or Local Laws
- ▶ Significant Contract Provisions
- ▶ Use of Restricted Revenue Sources

## **G—Approach to be Taken in Drawing Audit Samples for Purposes of Test of Compliance**

Statistical sampling will be used on these engagements and will be coordinated with other audit procedures to achieve audit objectives in the most efficient manner possible. Statistical sampling will be used in relation to audit procedures for:

- ▶ Tests of Controls
- ▶ Substantive Tests of Transactions and Account Balances
- ▶ Attribute Sampling
- ▶ Tests of Compliance with Laws and Regulations

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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All sampling will be performed in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Governmental Auditing Standards*, issued by the Comptroller General of the United States; OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations* and/or 2 CFR 200 *Uniform Guidance* (as applicable); Chapter 10.550, *Rules of the Auditor General*; and State Department of Financial Services, *State Projects Compliance Supplement*.

## H—Additional Information

### Software

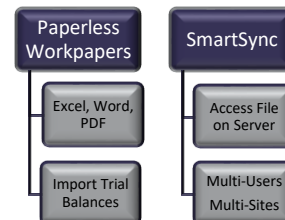
Purvis Gray values security and strives to protect data provided by the City. Our auditor's laptops are encrypted, and communications between the auditor and Purvis Gray's servers are performed over a secure VPN connection. The following are the various computer-based audit software tools used by Purvis Gray:



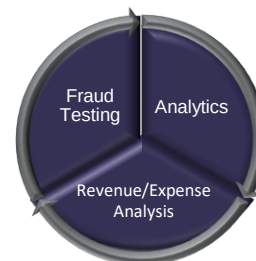
Suralink's Dynamic Request List is Integrated with a Secure File Hosting System for Seamless Document-Coordination Between the Client and the Auditor



*Paperless Audit Engagement Software System -  
CaseWare Working Papers and SmartSync*



Computer-Assisted Audit Techniques (CAATs)  
Software - CaseWare's IDEA with  
SmartAnalyzer and Excel



CHECKPOINT® TOOLS

Research and Audit Checklists, Worksheets, Programs,  
Letters – Thomson Reuters PPC Checkpoint Tools

Research, Reference Material,  
Checklists, Audit Programs, Practice  
Aids PPC Checkpoint Tools

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

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## **Recent, Current, and Projected Workloads**

The firm has been providing audit and accounting services for many years and is proud of its record of delivering quality and timely services to its clients. As mentioned in this document, a substantial percentage of our audit clients are governmental entities. We are highly experienced in managing the audits and work closely with our clients to arrive at mutually acceptable dates of fieldwork and delivery.

We take our commitment to provide services to our clients very seriously. Each year, we schedule our annual workload well in advance. Prior to proposing on new clients, we evaluate our capacity to ensure we only respond if we will be able to meet or exceed our clients' needs. We are highly experienced at managing audits and work closely with our clients to arrive at mutually acceptable dates of fieldwork and delivery.

## **Addressing Possible Audit Issues**

We do not anticipate any significant potential audit problems, although we do assume that every audit engagement will encounter some number of unanticipated issues - this is simply the nature of audit engagements; *we do not, however, use each of these problems as an opportunity to create additional billing prospects for our firm.* If a disagreement arises between the audit engagement partner and the City in regard to application of generally accepted accounting principles or similar items, it would first be discussed with an in-firm specialist and then with outside experts such as the GASB technical services center.

Since our firm specializes in governmental auditing, we remain knowledgeable about current and proposed standards and will discuss new standards with the City's personnel well in advance of implementation to avoid surprises and the sudden disruption they may cause.

The GASB, the AICPA, and other regulatory bodies may enact financial reporting or auditing standards which may affect our scope of services during the proposed engagement period. Again, we will notify you well in advance of any significant developments other than those already incorporated into our estimates of hours and staffing for each engagement year, as outlined in Appendix A.

As previously mentioned, our firm is a leader in the governmental industry. We regularly attend and speak at governmental accounting conferences around the state including those of AGA, FGFOA, FSFOA, FACC, and other groups. Our partners and managers are actively involved in the FICPA and FGFOA local government committees that respond to FASB, GASB, and *Auditing Standards Board* exposure drafts. Our membership in the AICPA Governmental Quality Control Center helps provide resources regarding new accounting and auditing pronouncements affecting our local governmental clients. Our auditors are up to date on all proposed pronouncements and other cutting-edge issues facing your industry and are able to provide seasoned advice and assistance as needed.

**APPENDIX A**

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES**

**FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS**

|                                       | <u>Hours</u> | <u>Standard<br/>Hourly<br/>Rates</u> | <u>Total</u> |
|---------------------------------------|--------------|--------------------------------------|--------------|
| Partners                              | _____        | _____                                | _____        |
| Managers                              | _____        | _____                                | _____        |
| Supervisory Staff                     | _____        | _____                                | _____        |
| Staff                                 | _____        | _____                                | _____        |
| Other (specify)                       |              |                                      |              |
| _____                                 | _____        | _____                                | _____        |
| Subtotal                              | _____        | _____                                | _____        |
| Out-of-pocket expenses:               |              |                                      |              |
| Meals and lodging                     | _____        | _____                                | _____        |
| Transportation                        | _____        | _____                                | _____        |
| Other (specify):                      |              |                                      |              |
| _____                                 | _____        | _____                                | _____        |
| Partners maximum price for 2021 audit |              |                                      | _____        |

**APPENDIX A – Continued**

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES**  
**FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS**  
**COMBINING SCHEDULE – ALL SERVICES**  
**DESCRIBED IN RFP SECTION III**

| <u>Nature of Service to Be Provided</u>   | <u>Total Price</u> | <u>Schedule</u>    |
|-------------------------------------------|--------------------|--------------------|
| <u>2021 Audit of Financial Statements</u> | <u>\$ 65,000</u>   | <u>See Page 47</u> |
| <u>2022 Audit of Financial Statements</u> | <u>\$ 67,000</u>   | <u>See Page 48</u> |
| <u>2023 Audit of Financial Statements</u> | <u>\$ 69,000</u>   | <u>See Page 49</u> |
| <u>Total</u>                              | <u>\$201,000</u>   | <u></u>            |

**EACH SERVICE DESCRIBED IN RFP SECTION III SHOULD BE SUPPORTED BY AN INDIVIDUAL SCHEDULE IN THE FORMAT PROVIDED ON PAGE 3 OF THIS APPENDIX.**

**APPENDIX A - Continued**

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES**  
**FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS**

|                         | <u>Standard<br/>Hours</u> | <u>Standard<br/>Rates</u> | <u>Total</u> |
|-------------------------|---------------------------|---------------------------|--------------|
| Partners                | _____                     | _____                     | _____        |
| Managers                | _____                     | _____                     | _____        |
| Supervisory Staff       | _____                     | _____                     | _____        |
| Staff                   | _____                     | _____                     | _____        |
| Other (specify)         |                           |                           |              |
| _____                   | _____                     | _____                     | _____        |
| Subtotal                | _____                     | _____                     | _____        |
| Out-of-pocket expenses: |                           |                           |              |
| Meals and lodging       | _____                     | _____                     | _____        |
| Transportation          | _____                     | _____                     | _____        |
| Other (specify):        |                           |                           |              |
| _____                   | _____                     | _____                     | _____        |
| Total Price             |                           |                           | _____        |

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## APPENDIX A SCHEDULE OF PROFESSIONAL FEES AND EXPENSES FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS

Fiscal Year Ended September 30, 2021

|                                     | Hours | Standard<br>Hourly<br>Rates | Total                   |
|-------------------------------------|-------|-----------------------------|-------------------------|
| Partners                            | 105   | 225                         | \$ 23,625               |
| Managers                            | 150   | 185                         | 27,750                  |
| Supervisory Staff                   | 150   | 150                         | 22,500                  |
| Staff                               | 210   | 125                         | 26,250                  |
| Other (Clerical)                    | 25    | 65                          | 1,625                   |
| <b>Subtotal</b>                     | 640   | *                           | 101,750                 |
| <b>Discount</b>                     |       |                             | (36,750)                |
| <b>Total Fees</b>                   |       |                             | <u>65,000</u>           |
| <b>Out-of-Pocket Expenses</b>       |       |                             |                         |
| Meals and Lodging                   |       |                             | -                       |
| Transportation                      |       |                             | -                       |
| Other                               |       |                             | -                       |
| <b>Maximum Price for 2021 audit</b> |       |                             | <u><u>\$ 65,000</u></u> |

**\*Note:** Estimated hours include additional time expected to be incurred related to new blended component unit (Crestview Unlimited, Inc.).



# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## APPENDIX A SCHEDULE OF PROFESSIONAL FEES AND EXPENSES FOR THE AUDIT OF THE 2022 FINANCIAL STATEMENTS

Fiscal Year Ended September 30, 2022

|                                     | Hours | Standard<br>Hourly<br>Rates | Total            |
|-------------------------------------|-------|-----------------------------|------------------|
| Partners                            | 110   | 230                         | \$ 25,300        |
| Managers                            | 160   | 190                         | 30,400           |
| Supervisory Staff                   | 155   | 155                         | 24,025           |
| Staff                               | 215   | 130                         | 27,950           |
| Other (Clerical)                    | 25    | 70                          | 1,750            |
| <b>Subtotal</b>                     | 665   | **                          | 109,425          |
| <b>Discount</b>                     |       |                             | (42,425)         |
| <b>Total Fees</b>                   |       |                             | 67,000           |
| <b>Out-of-Pocket Expenses</b>       |       |                             |                  |
| Meals and Lodging                   |       |                             | -                |
| Transportation                      |       |                             | -                |
| Other                               |       |                             | -                |
| <b>Maximum Price for 2022 Audit</b> |       |                             | <u>\$ 67,000</u> |

**\*\*Note:** Estimated hours include additional time expected to be incurred related to implementation of GASB 87: Leases.

# INFORMATION TO BE INCLUDED IN THE PROPOSAL

## APPENDIX A SCHEDULE OF PROFESSIONAL FEES AND EXPENSES FOR THE AUDIT OF THE 2023 FINANCIAL STATEMENTS

Fiscal Year Ended September 30, 2023

|                                     | Hours | Standard<br>Hourly<br>Rates | Total            |
|-------------------------------------|-------|-----------------------------|------------------|
| Partners                            | 110   | 235                         | \$ 25,850        |
| Managers                            | 165   | 195                         | 32,175           |
| Supervisory Staff                   | 165   | 160                         | 26,400           |
| Staff                               | 220   | 135                         | 29,700           |
| Other (Clerical)                    | 25    | 75                          | 1,875            |
| <b>Subtotal</b>                     | 685   | ***                         | 116,000          |
| <b>Discount</b>                     |       |                             | (47,000)         |
| <b>Total Fees</b>                   |       |                             | 69,000           |
| <b>Out-of-Pocket Expenses</b>       |       |                             |                  |
| Meals and Lodging                   |       |                             | -                |
| Transportation                      |       |                             | -                |
| Other                               |       |                             | -                |
| <b>Maximum Price for 2023 audit</b> |       |                             | <u>\$ 69,000</u> |

\*\*\*Note: Estimated hours include additional time expected to be incurred related to implementation of GASB 96: Subscription-Based IT Arrangements.

## **APPENDIX B**

### ***PUBLIC ENTITY CRIMES STATEMENT***

Any person submitting a quote, bid, or proposal in response to this invitation or a contract, must execute the enclosed for PUR, 7069, sworn statement under section 287.133 (3)(a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES, including proper check(s), in the space(s) provided, and enclose it with this quote, bid or proposal. If you are submitting a quote, bid, or proposal on behalf of dealers or suppliers who will ship commodities and receive payment from the resulting contract, it is your responsibility to see that copy(ies) of the form are executed by them and are included with your quote, bid or proposal. Corrections to the form will not be allowed after the quote, bid, or proposal opening time and date. Failure to complete this form in every detail and submit it with your quote, bid, or proposal may result in immediate disqualification of your bid or proposal.

The 1989 Florida Legislature passed Senate Bill 458 creating Sections 287.132-133, Florida Statutes, and effective July 1, 1989. Section 287.132(3) (d), Florida Statutes, requires the Florida Department of General Services to maintain and make available to other political entities a “convicted vendor” list consisting of persons and affiliates who are disqualified from public contracting and purchasing process because they have been found guilty of a public entity crime. A public entity crime is described by Section 287.133, Florida Statutes, as a violation of any State or Federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or with an agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

By law no public entity shall accept any bid from, award any contract to, or transact any business in excess of the threshold amount provided in Section 287.017, Florida Statutes, for category two with any person or affiliate on the convicted vendor list for a period of 36 months from the date that person or affiliate was placed on the convicted vendor list unless that person or affiliate has been removed from the list pursuant to Section 287.133(3) (f), Florida Statutes.

Therefore, effective October 1, 1990, prior to entering into a contract (formal contract or purchase order in excess of the threshold amount for category two) to provide goods or services to **THE CITY OF CRESTVIEW**, a person shall file a sworn statement with the contracting officer or City Clerk, as applicable. The attached statement or affidavit will be the form to be utilized and must be properly signed in the presence of a notary public or other officer authorized to administer oaths and properly executed.

**THE INCLUSION OF THE SWORN STATEMENT OR AFFIDVIT SHALL BE SUBMITTED CONCURRENTLY WITH YOUR QUOTE, PROPOSAL OR BID DOCUMENTS. NON-INCLUSION OF THIS DOCUMENT MAY NECESSITATE REJECTION OF YOUR QUOTE, PROPOSAL OR BID.**

SWORN STATEMENT UNDER SECTION 287.133(3) (a),  
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

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

1. This sworn statement is submitted with the Independent Auditing Services Proposal for THE CITY OF CRESTVIEW.
2. This sworn statement is submitted by Purvis, Gray and Company, LLP, whose business address is 443 East College Ave. Tallahassee, FL 32301 and (if applicable) its Federal Employer Identification (FEIN) is 59-0548468.
3. My name is Ryan M. Tucker, CPA (please print name of individual signing) and my relationship to the entity name above is Partner.
4. I understand that "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract of goods or services to be provided to any public entity or an agency or political subdivision of any other state of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
  - (a) A predecessor or successor of a person convicted of a public entity crime; or
  - (b) An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services led by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)  
  
X Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

- \_\_\_ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (Please indicate which additional statement applies.)
- \_\_\_ There has been a proceeding concerning the conviction before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)
- \_\_\_ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)
- \_\_\_ The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services).



(Signature)

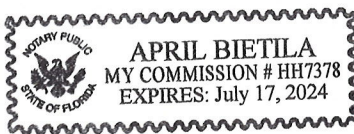
Date: December 31, 2021

STATE OF FLORIDA

COUNTY OF ALACHUA

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of January, 2021 by Ryan M. Tucker, CPA, Partner (title) on behalf of Purvis, Gray and Company, LLP. He/she is personally known to me or has produced \_\_\_\_\_ as identification and did ( ) did not ( ) take an oath.

  
(Notary Signature)



Name: April Bietila  
My Commission Expires 07-17-2024  
Commission Number HH7378

## APPENDIX C

### ***Drug-Free Workplace Form***

The undersigned, in accordance with Florida Statute 287.087 hereby certifies that Purvis, Gray and Company, LLP  
does:

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' policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, 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 a copy of the statement specified in paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working the commodities or contractual services that 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 1893 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 Paragraph 1 through 5.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

December 31, 2021

Date



\_\_\_\_\_  
Name and Title

Ryan M. Tucker, CPA Partner



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/29/2021

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).

|                                                                                                                      |                                                                                                                                                                                                                                                     |
|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>PRODUCER</b><br>McGriff-Williams Insurance<br>3501-A W. University Ave<br>Gainesville FL 32607                    | <b>CONTACT NAME:</b> Heidi Tapanes<br><b>PHONE (A/C, No, Ext):</b> 352-371-7977<br><b>E-MAIL ADDRESS:</b> heidi@mcgriffwilliams.com<br><b>FAX (A/C, No):</b> 352-505-2083                                                                           |
| <b>INSURED</b><br>Purvis Gray & Co., LLP and<br>Purvis Gray Tech. Group LLC<br>PO Box 141270<br>Gainesville FL 32614 | <b>INSURER(S) AFFORDING COVERAGE</b><br><b>INSURER A:</b> Allied Property and Casualty<br><b>INSURER B:</b> Associated Industries Ins Co<br><b>INSURER C:</b> General Star Indemnity<br><b>INSURER D:</b><br><b>INSURER E:</b><br><b>INSURER F:</b> |

**COVERAGES****CERTIFICATE NUMBER:** 1547705617**REVISION NUMBER:**

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

| INSR LTR | TYPE OF INSURANCE                                                                                                                                                                                                                                                                                                      | ADDL INSD                       | SUBR WVD | POLICY NUMBER                       | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS                                                                                                                                                                                                                                         |
|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|----------|-------------------------------------|-------------------------|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A        | <input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b><br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER: | Y                               | Y        | ACBPPOC5995521854                   | 5/31/2021               | 5/31/2022               | EACH OCCURRENCE \$ 1,000,000<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000<br>MED EXP (Any one person) \$ 5,000<br>PERSONAL & ADV INJURY \$ 1,000,000<br>GENERAL AGGREGATE \$ 2,000,000<br>PRODUCTS - COMP/OP AGG \$ 2,000,000<br>\$ |
| A        | <input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b><br><input type="checkbox"/> ANY AUTO<br><input type="checkbox"/> OWNED AUTOS ONLY<br><input checked="" type="checkbox"/> HIRED AUTOS ONLY<br><input type="checkbox"/> SCHEDULED AUTOS<br><input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY                 |                                 |          | ACBPPOC5995521854                   | 5/31/2021               | 5/31/2022               | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$<br>\$                                                                                |
| A        | <input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR<br><input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE<br>DED RETENTION \$                                                                                                                    |                                 |          | ACPCAP5995521854                    | 5/31/2021               | 5/31/2022               | EACH OCCURRENCE \$ 5,000,000<br>AGGREGATE \$<br>\$                                                                                                                                                                                             |
| B        | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below                                                                                                                          | Y/N<br><input type="checkbox"/> | Y        | AWC1166790                          | 5/31/2021               | 5/31/2022               | <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER<br>E.L. EACH ACCIDENT \$ 1,000,000<br>E.L. DISEASE - EA EMPLOYEE \$ 1,000,000<br>E.L. DISEASE - POLICY LIMIT \$ 1,000,000                                      |
| A<br>C   | Employee Dishonesty Bond<br>Professional                                                                                                                                                                                                                                                                               |                                 |          | BDC7900387274<br>C55287-00060-21-00 | 5/31/2021<br>9/21/2021  | 5/31/2022<br>9/21/2022  | \$500,000<br>\$5,000,000                                                                                                                                                                                                                       |

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

**CERTIFICATE HOLDER****CANCELLATION**

Insured Copy

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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CITY OF CRESTVIEW  
AMENDMENT TO REQUEST FOR PROPOSALS  
FOR  
INDEPENDENT AUDITING SERVICES

Section I.

General Information

As required by Florida Statute Section 218.391, The Audit Committee (the "Committee") will consist of no less than three members, one of which will be a member of the governing body. This member will serve as the committee chair. Additional nonemployee members will be selected from the community by the Finance Director and the City Manager. One City staff member from the Financial Services Department will be appointed to serve in an advisory capacity.

Acknowledgement



Ryan M. Tucker, CPA Partner

December 31, 2021

\_\_\_\_\_  
Date



**CITY OF CRESTVIEW  
REQUEST OF PROPOSALS**

**FOR  
INDEPENDENT AUDITING SERVICES**

**Refer Technical, General, Terms & Conditions Questions To:**

**Gina Toussaint, Finance Director  
198 N. Wilson Street  
Crestview, Florida 32536  
Telephone: (850) 682-1560 ext. 248  
E-mail: [ginatoussaint@cityofcrestview.org](mailto:ginatoussaint@cityofcrestview.org)**

**BID DUE: JANUARY 6, 2022  
BID DUE BY: PRIOR TO 2:00 P.M.  
BID OPENING DATE: JANUARY 6, 2022  
BID OPENING TIME: 2:00 P.M.**

**ALL PROPOSALS MUST BE RECEIVED IN THE CITY CLERK'S OFFICE LOCATED AT 198 N. WILSON STREET, CRESTVIEW, FLORIDA, 32536 PRIOR TO THE DATE AND TIME SHOWN ABOVE. LATE PROPOSALS WILL BE RETURNED UNOPENED.**

Please submit (1) signed original marked "Original"  
and (1) digital copy of your proposal.

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## **Introduction**

The City of Crestview, Florida (the “City”), is requesting proposals from qualified firms of certified public accountants to audit its financial statements for the fiscal years ending September 30, 2021 through 2023, with the option of auditing its financial statements for each of the two subsequent fiscal years. These audits are to be performed in accordance with generally accepted auditing standards in addition to the following:

- (1) Section 11.45, Florida Statutes
- (2) Regulations of the State Department of Banking and Finance
- (3) Rules of the Auditor General (Chapter 10.550, Local Government Entity Audits)
- (4) Audit and Accounting Guide – Audits of State and Local Governmental Units (“the AICPA Guide”)
- (5) Single Audit Act (Federal and State, if applicable)
- (6) Standards for Audit of Governmental Organizations, Programs, Activities, and Functions, published by the Comptroller General of the United States
- (7) U.S Office of Management and Budget, Circular No. A-133, Audits of States, Local Governments, and Non-Profit Organizations
- (8) General Accounting Offices (GAO) Government Auditing Standards

## **I. General Information**

- 1) The Audit Committee (the “Committee”) is composed of the City Clerk, Finance Director, an Administrative Assistant and a department head.
- 2) **All Inquiries in reference to this Request for Proposal shall be submitted in writing to:**

Gina Toussaint  
Finance Director  
City of Crestview  
198 N. Wilson Street  
Crestview, Florida 32536  
Email – [ginatoussaint@cityofcrestview.org](mailto:ginatoussaint@cityofcrestview.org)  
Phone – (850) 682-1560 ext. 248  
Fax - (850) 682-8077

- 3) All responses to the RFP must be received as soon as possible, but no later than 2:00 PM on January 6, 2022, at the address listed in 2 above. Four (4) signed copies of your proposal shall be submitted in one sealed package, clearly marked on the outside “**Proposal for Independent Auditing Services.**” Any responses received after the deadline will be returned to the proposer unopened. The City will not reimburse any costs incurred by the responding firms in preparing proposals in response to this request.
- 4) The Committee will recommend no fewer than three proposers to the City Council. If fewer than three firms respond to the request for proposal, the committee will recommend such firms as it deems to be the most highly qualified. The Committee reserves the right to reject any and all

proposals submitted and to request additional information from the proposers. At the discretion of the Committee, firms submitting proposals will be requested to make oral presentations as part of the evaluation process.

- 5) The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City and the firm selected.
- 6) Firms submitting proposals may subcontract portions of the engagement. If this is to be done, the name of the proposed subcontracting firms must be clearly identified in the proposal. Following the award of the audit contract, no additional subcontracting will be allowed without the express prior written consent of the City. Such consent may be withheld, conditioned, or denied and is the sole discretion of the City Council.
- 7) Each member of the Committee will rank the proposers using a point formula by the set of criteria described in Section VIII (2). The committee will combine the individual scores to arrive at a score for each firm. The City Council will negotiate a contract with one of the proposers in accordance with Section 218.391 Florida Statutes. It is anticipated that the City will enter into a three-year contract for the fiscal years ending September 30, 2021 through 2023, with the option of each of the two subsequent fiscal years.

8) **RFP Calendar:**

December 10, 2021  
January 6, 2022  
TBA

TBA

Proposal to be advertised  
Responses to RFP due by 2:00 P.M.  
The Committee meeting to evaluate the RFP response and develop a list of firms to make oral presentations.  
Committee recommendations to City Council with short list of three (3) firms.  
Council approve contract for audit services.

- 9) Audits for the last five (5) fiscal years were completed by Saltmarsh, Cleveland & Gund, CPAs. The last five fiscal years Financial Reports are available online at [www.cityofcrestview.org](http://www.cityofcrestview.org) (click on Government, Departments, Financial Services Department, Crestview Financial Information, Audited Financial Reports).
- 10) The City does not have an internal audit department
- 11) All requirements and conditions set forth in the RFP shall be incorporated into the contract between the City and the selected firm unless otherwise specified in the contract.

## **II. Description of City of Crestview and Records to be Audited**

- ☐ The City of Crestview has an estimated population of over 25,000. It is located approximately 50 miles east of Pensacola and 140 miles west of Tallahassee.
- ☐ For reporting purposes, the Financial Reports will include the City of Crestview and

its two blended component units, the Community Redevelopment Agency (CRA) and Crestview Unlimited, Inc. (a nonprofit corporation).

- ☐ Accounting records for the City, including the Community Redevelopment Agency (CRA) and Law Enforcement Trust Fund are maintained by the Finance Department. The City's records include a general fund, a debt service fund, 1 capital project fund, 3 enterprise funds, a general fixed asset account group, and a general long-term debt account group. The FY 2021 total budget for the City is approximately \$45.6 million. Enterprise funds are used to account for the Water & Sewer, Stormwater and Sanitation Departments. The audit would also include auditing procedures for the City's General Employees Retirement Plan and the City's Police Officer's & Firefighter's Retirement Plan.
- ☐ All accounting records are maintained on the modified accrual basis or accrual basis as appropriate.
- ☐ Budgets are integrated with the accounting records.
- ☐ The City's annual financial reports are general purpose however it is the desire of the City to have Comprehensive Annual Financial Reports. The selected firm will be expected to provide technical assistance to help the City meet their goals.
- ☐ The City is progressive in its attitude toward new accounting standards. Early implementation is practiced when recommended.

### **III. Services Required**

- 1) An audit and an opinion on the basic financial statements for the City. Financial statements are to be prepared in accordance with GASB Statement 34.
- 2) The audit is to be done in accordance with the Rules of the Auditor General, Chapter 10.550, the Single Audit Act, OMB Circular A-133, the GAO Yellow Book, Government Auditing Standards, and the AICPA Auditing Standards.
- 3) The Review and recommendation for required note disclosures for the City's Annual Financial Statements.
- 4) Following the completion of the audit of the fiscal year's financial statements, the auditor shall issue the following reports and schedules for the City:
  - a. A report on the fair presentation of the financial statements in conformity with general accepted accounting principles.
  - b. A report on the internal control structure based on the auditors' understanding of the control structure and assessment of control risk.
  - c. Reports on compliance with specific requirements applicable to Federal and state financial assistance programs.
  - d. Schedule of Findings and Questioned Costs – Federal Programs and State Projects.
  - e. The auditor shall communicate in a letter to management any reportable conditions found during the audit.

- f. Other reports as required by law or other governing bodies.
- 5) Special Reports for the City:
  - a. Data Collection Form to the Federal Audit Clearinghouse (SF-SAC) as required by OMB Circular A-133.
- 6) Assistance in providing guidance and implementing changes in governmental accounting standards.
- 7) If the City does issue debt, for which the official statement in connection with the debt contains basic financial statements and the report of independent accounts, the firm shall be required to issue a “consent and citation of expertise” as auditor and any necessary “comfort letters” at no additional cost to the City.
- 8) Irregularities and illegal acts. Auditors shall be required to make an immediate, written report of all irregularities and illegal acts to Gina Toussaint, Finance Director.

#### **IV. Additional Professional Services**

It is the intent of the City that future additional audit requirements, imposed on the City by applicable national and state agencies, shall be provided by the auditor and included in the negotiated fee between the City and the auditing firm.

#### **V. Qualifications of the Auditor**

- 1) The firm must have license to practice in Florida. ✓
- 2) The firm should provide an affirmative statement that it is independent of the City of Crestview as defined by generally accepted auditing standards/Government Auditing Standards issued by the Comptroller General of the United States.
- 3) The firm must have been established in Florida and performed continuous CPA services for a minimum of five years.
- 4) The firm must be a member in good standing with the American Institute of Certified Public accountants and the Florida Institute of Certified Public Accountants.
- 5) The firm should clearly indicate its expertise. Resumes should be provided for the partner and manager who would be in charge of the audit.
- 6) The individuals who will be primarily responsible for the audit must have 24 hours of governmental accounting and auditing CPE.
- 7) The firm should indicate any disciplinary actions that have been instituted or proposed against the firm during the last three years.
- 8) The firm should describe the results of any state or federal reviews during the past three years of the firm’s governmental client audit work.



- 9) Ability to adequately store all working papers and reports at the auditor's expense for a minimum of three years, unless the firm is notified by the City to extend the retention period. The auditor will be required to make working papers available, upon request, to the following parties or their designees: the City, General Accounting Office, parties to an audit quality review process, and auditors of entities of which the City is a recipient of grant funds. In addition, the firm shall respond to the reasonable inquiries of successor auditors and allow successor auditors to review working papers.

## **VI. Information to be Included in the Proposal**

- 1) Title page showing the RFP subject, the name of the firm, address, telephone number, the name of the contact person, and the date.
- 2) A table of contents providing a clear identification of the material by section and by page number.
- 3) A statement as to whether the firm is licensed to practice in Florida.
- 4) A statement as to whether the firm is independent of the City of Crestview as defined by generally accepted auditing standards/Government Auditing Standards issued by the Comptroller General of the United States.

The firm should also list and describe the firm's (or proposed) subcontractors' professional relationships involving the City of Crestview for the past five (5) years, together with a statement explaining why such relationships do not constitute a conflict of interest relative to performing the proposed audit.

In addition, the selected firm shall give the City of Crestview written notice of any professional relationships entered into during the period of this agreement.

- 5) A statement setting forth the proposer's understanding of the work to be done and a positive commitment to perform the work within the specified time period.
- 6) A statement as to whether the firm is local, regional, or national.
- 7) The location of the office from which the work is to be done and the number of personnel in that office who would be working on the audit.
- 8) An identification of the partners, managers and supervisors who will work on the audit, including staff from other than the local office if necessary for this audit. Resumes for each managerial and supervisory person to be assigned to the audit should be submitted and include the following information:
  - a. Formal education and licensed to practice in Florida
  - b. Supplemental education relative to governmental accounting and auditing
  - c. Experience in public accounting in general
  - d. Experience in private business or government
  - e. Experience in auditing government units
  - f. Membership in various national and state governmental accounting boards, committees, or associates (past and present)
  - g. Professional recognition, such as Certified Public Accounting licenses, awards, etc.

- 9) A description of your office's experience in preparing governmental financial statements.
- 10) A listing of Florida counties and municipalities for which your firm is providing or has provided audit services.
- 11) The proposal should set forth a work plan, including an explanation of the audit methodology to be followed, to perform the services required in Section III of this request for proposal.

Proposers will be required to provide the following information on their audit approach:

- a. Proposed segmentation of the engagement
  - b. Level of staff and number of hours to be assigned to each proposed segment of the engagement
  - c. Sample size and the extent to which statistical sampling is to be used in the engagement
  - d. Type and extent of analytical procedures to be used in the engagement
  - e. Approach to be taken to gain and document an understanding of the internal control structure
  - f. Approach to be taken in determining laws and regulations that will be subject to audit test work.
  - g. Approach to be taken in drawing audit samples for purposes of tests of compliance
- 12) Compensation, outlining number of hours and hourly rate per professional staff position and out of pocket expenses. A Schedule of Professional fees and Expenses form (Appendix A) must be utilized, which is located on page 13-15. Fees shall be submitted for each fiscal year.
  - 13) **Public Entity Crimes Statement:** Firms submitting Proposals shall file a sworn statement with the City stating whether a person or affiliate as defined in Section 287.133(1) Florida Statutes, has been convicted of a public entity crime subsequent to July 1, 1989, in accordance with the provisions of Section 287.133 of the Florida Statutes. Copies of Statement Forms are attached (**Appendix B**).
  - 14) **Drug-Free Workplace Certification:** In accordance with Florida Statute 287.089, the Drug-Free Workplace Certification must be provided by the Proposing Firm. A copy of the Drug-Free Workplace Form is attached (**Appendix C**) and must be filled out, signed and submitted with proposal. Failure to provide this certification will render your Firm unqualified and ineligible for award.
  - 15) Include a copy of your certificate of insurance with your proposal.

## **VII. Annual Financial Statements**

### **1) Support**

- a. Staff will perform the year-end closing of the books
- b. Staff will prepare work schedules and related materials as requested by the selected firm.
- c. Staff will provide paid invoices, copies of canceled checks and other supportive documentation as requested by the firm.

## **VIII. Evaluation Procedures**

- 1) The Committee will review all responses and score individually using the criteria listed below. Firms meeting the mandatory criteria will have their proposals evaluated and scored.
- 2) The responses will be evaluated using two sets of criteria. Firms meeting the mandatory criteria will have their proposals evaluated and scored on technical qualifications as well as fees. The following represent the principal criteria that will be considered during the evaluation process.

### **Mandatory Elements**

- a. The audit firm is independent and licensed to practice in Florida.
- b. The firm has no conflict of interest with regard to any other work performed by the firm for City of Crestview and its component unit.
- c. The firm adheres to the instructions in this request for proposal on preparing and submitting the proposal.
- d. The firm submits a copy of its last external quality control review report and the firm has a record of quality audit work.

### **Technical Quality**

|                                                                             | <b><u>Point Range</u></b> |
|-----------------------------------------------------------------------------|---------------------------|
| a. General Government audit experience                                      | 0-20                      |
| b. Qualifications of individuals assigned to audit                          | 0-20                      |
| c. Size and organization structure of firm                                  | 0-10                      |
| d. Familiarity of Certificate of Achievement in Financial Reporting Program | 0-10                      |
| e. Demonstrated understanding of City of Crestview's requirements           | 0-05                      |
| f. Audit approach                                                           | 0-15                      |

### **Fees**

|                                          |                    |
|------------------------------------------|--------------------|
| a. Audit fees total (over 3-year period) | <b><u>0-20</u></b> |
|------------------------------------------|--------------------|

Total Points 100

## **COST WILL NOT BE THE PRIMARY FACTOR IN THE SELECTION OF AN AUDIT FIRM**

## **IX. Note to All Prospective Proposers**

It is the intent of the Committee to comply with the Auditor Selection Procedures as noted in F.S. 218.391.

### **PUBLIC ENTITY CRIMES**

Pursuant to Florida Statutes Section 287.133(2)(a), all Bidders are hereby notified that a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity (defined as the State of Florida, any of its departments or agencies, or any political subdivision); may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor,

supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in Florida Statutes Section 287.017 for CATEGORY TWO (currently \$25,000) for a period of 36 months from the date of being placed on the convicted vendor list. A “public entity crime” means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state with the United States, including, but not limited to, any bid, proposal, reply, or contract for goods or services, any lease for real property, or any contract for the construction or repair of a public building or public work, involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material representation.

### **INSURANCE REQUIREMENTS**

(Include a copy of your certificate of insurance with your proposal)

Workers’ compensation to meet statutory limits in the State of Florida and Employer’s Liability with a limit of \$100,000 disease for each accident, \$500,000 disease (policy limit) and \$100,000 disease (each employee).

Commercial General Liability with a minimum combined single limit of \$500,000 per occurrence for bodily injury and property damage. This is to include premises/operations, products/completed operations, contractual liability and independent contractors’ coverage.

Business Auto Liability with a minimum combined single limit of \$500,000 per occurrence for bodily injury and property damage. This is to include owned, hired and non-owned autos.

Professional liability with a minimum limit of \$500,000 per occurrence.

The City is to be additionally insured on the commercial general liability and business liability policies. The City will be given 30 days notice prior to cancellation or modification of any insurance. Such notification shall be in writing by registered mail, return receipt requested and addressed to the Finance Director. It is the responsibility of the contractor to ensure that all subcontractors comply with all insurance requirements.

QUESTIONS OR INQUIRIES REGARDING THE MEANING OR INTERPRETATION OF ANY OF THE PROVISIONS OF THIS RFP MUST BE DIRECTED TO GINA TOUSSAINT, FINANCE DIRECTOR. CONTACT WITH PERSONNEL OF CITY OF CRESTVIEW, OTHER THAN GINA TOUSSAINT, FOR PURPOSES OF INQUIRIES REGARDING MEANING OR INTERPRETATION SHALL BE GROUNDS FOR ELIMINATION. THE CITY SHALL NOT BE RESPONSIBLE FOR ANY REPRESENTATIONS MADE BY ANYONE OTHER THAN GINA TOUSSAINT.

**APPENDIX A**

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES**

**FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS**

|                                       | <u>Hours</u> | <u>Standard<br/>Hourly<br/>Rates</u> | <u>Total</u> |
|---------------------------------------|--------------|--------------------------------------|--------------|
| Partners                              | _____        | _____                                | _____        |
| Managers                              | _____        | _____                                | _____        |
| Supervisory Staff                     | _____        | _____                                | _____        |
| Staff                                 | _____        | _____                                | _____        |
| Other (specify)                       | _____        | _____                                | _____        |
| _____                                 | _____        | _____                                | _____        |
| Subtotal                              | _____        | _____                                | _____        |
| Out-of-pocket expenses:               |              |                                      |              |
| Meals and lodging                     | _____        | _____                                | _____        |
| Transportation                        | _____        | _____                                | _____        |
| Other (specify):                      | _____        | _____                                | _____        |
| _____                                 | _____        | _____                                | _____        |
| Partners maximum price for 2021 audit |              |                                      | _____        |

**APPENDIX A – Continued**

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES**  
**FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS**  
**COMBINING SCHEDULE – ALL SERVICES**  
**DESCRIBED IN RFP SECTION III**

| <u>Nature of Service to Be Provided</u> | <u>Total Price</u> | <u>Schedule</u> |
|-----------------------------------------|--------------------|-----------------|
| <hr/>                                   | <hr/>              | <hr/>           |
| <hr/>                                   | <hr/>              | <hr/>           |
| <hr/>                                   | <hr/>              | <hr/>           |
| <hr/>                                   | <hr/>              | <hr/>           |

**EACH SERVICE DESCRIBED IN RFP SECTION III SHOULD BE SUPPORTED BY AN INDIVIDUAL SCHEDULE IN THE FORMAT PROVIDED ON PAGE 3 OF THIS APPENDIX.**

**APPENDIX A - Continued**

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES**

**FOR THE AUDIT OF THE 2021 FINANCIAL STATEMENTS**

|                         | <u>Standard<br/>Hours</u> | <u>Standard<br/>Rates</u> | <u>Total</u> |
|-------------------------|---------------------------|---------------------------|--------------|
| Partners                | _____                     | _____                     | _____        |
| Managers                | _____                     | _____                     | _____        |
| Supervisory Staff       | _____                     | _____                     | _____        |
| Staff                   | _____                     | _____                     | _____        |
| Other (specify)         | _____                     | _____                     | _____        |
| _____                   | _____                     | _____                     | _____        |
| Subtotal                | _____                     | _____                     | _____        |
| Out-of-pocket expenses: |                           |                           |              |
| Meals and lodging       | _____                     | _____                     | _____        |
| Transportation          | _____                     | _____                     | _____        |
| Other (specify):        | _____                     | _____                     | _____        |
| _____                   | _____                     | _____                     | _____        |
| Total Price             |                           |                           | _____        |



## **APPENDIX B**

### ***PUBLIC ENTITY CRIMES STATEMENT***

Any person submitting a quote, bid, or proposal in response to this invitation or a contract, must execute the enclosed for PUR, 7069, sworn statement under section 287.133 (3)(a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES, including proper check(s), in the space(s) provided, and enclose it with this quote, bid or proposal. If you are submitting a quote, bid, or proposal on behalf of dealers or suppliers who will ship commodities and receive payment from the resulting contract, it is your responsibility to see that copy(ies) of the form are executed by them and are included with your quote, bid or proposal. Corrections to the form will not be allowed after the quote, bid, or proposal opening time and date. Failure to complete this form in every detail and submit it with your quote, bid, or proposal may result in immediate disqualification of your bid or proposal.

The 1989 Florida Legislature passed Senate Bill 458 creating Sections 287.132-133, Florida Statutes, and effective July 1, 1989. Section 287.132(3) (d), Florida Statutes, requires the Florida Department of General Services to maintain and make available to other political entities a "convicted vendor" list consisting of persons and affiliates who are disqualified from public contracting and purchasing process because they have been found guilty of a public entity crime. A public entity crime is described by Section 287.133, Florida Statutes, as a violation of any State or Federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or with an agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

By law no public entity shall accept any bid from, award any contract to, or transact any business in excess of the threshold amount provided in Section 287.017, Florida Statutes, for category two with any person or affiliate on the convicted vendor list for a period of 36 months from the date that person or affiliate was placed on the convicted vendor list unless that person or affiliate has been removed from the list pursuant to Section 287.133(3) (f), Florida Statutes.

Therefore, effective October 1, 1990, prior to entering into a contract (formal contract or purchase order in excess of the threshold amount for category two) to provide goods or services to **THE CITY OF CRESTVIEW**, a person shall file a sworn statement with the contracting officer or City Clerk, as applicable. The attached statement or affidavit will be the form to be utilized and must be properly signed in the presence of a notary public or other officer authorized to administer oaths and properly executed.

**THE INCLUSION OF THE SWORN STATEMENT OR AFFIDVIT SHALL BE SUBMITTED CONCURRENTLY WITH YOUR QUOTE, PROPOSAL OR BID DOCUMENTS. NON-INCLUSION OF THIS DOCUMENT MAY NECESSITATE REJECTION OF YOUR QUOTE, PROPOSAL OR BID.**

SWORN STATEMENT UNDER SECTION 287.133(3) (a),  
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

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

1. This sworn statement is submitted with the Independent Auditing Services Proposal for THE CITY OF CRESTVIEW.
2. This sworn statement is submitted by \_\_\_\_\_, whose business address is \_\_\_\_\_ and (if applicable) its Federal Employer Identification (FEIN) is \_\_\_\_\_.
3. My name is \_\_\_\_\_ (please print name of individual signing) and my relationship to the entity name above is \_\_\_\_\_.
4. I understand that "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract of goods or services to be provided to any public entity or an agency or political subdivision of any other state of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
  - (a) A predecessor or successor of a person convicted of a public entity crime; or
  - (b) An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services led by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)

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

- \_\_\_\_\_ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (Please indicate which additional statement applies.)
- \_\_\_\_\_ There has been a proceeding concerning the conviction before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)
- \_\_\_\_\_ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)
- \_\_\_\_\_ The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services).

\_\_\_\_\_  
(Signature)

Date: \_\_\_\_\_

STATE OF FLORIDA

COUNTY OF \_\_\_\_\_

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 2021 by \_\_\_\_\_, \_\_\_\_\_ (title) on behalf of \_\_\_\_\_. He/she is personally known to me or has produced \_\_\_\_\_ as identification and did ( ) did not ( ) take an oath.

\_\_\_\_\_  
(Notary Signature)

Name: \_\_\_\_\_

My Commission Expires \_\_\_\_\_

Commission Number \_\_\_\_\_

## APPENDIX C

### ***Drug-Free Workplace Form***

The undersigned, in accordance with Florida Statute 287.087 hereby certifies that \_\_\_\_\_  
does:

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' policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, 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 a copy of the statement specified in paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working the commodities or contractual services that 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 1893 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 Paragraph 1 through 5.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name and Title

CITY OF CRESTVIEW  
AMENDMENT TO REQUEST FOR PROPOSALS  
FOR  
INDEPENDENT AUDITING SERVICES

Section I.

General Information

As required by Florida Statute Section 218.391, The Audit Committee (the "Committee") will consist of no less than three members, one of which will be a member of the governing body. This member will serve as the committee chair. Additional nonemployee members will be selected from the community by the Finance Director and the City Manager. One City staff member from the Financial Services Department will be appointed to serve in an advisory capacity.

# Auditing Services

Reviewer

Jandra Wilson

Each category for review should receive a score based on the point range provided for each criteria. The scores will be weighted based on the percentages. The company with the highest score will be the recommended vendor.

| Company Name   | Audit Experience 0-20 | Individual Qualifications 0-20 | Size and Structure of Organization 0-20 | Certificate of Achievement of 0-10 | Understanding of Requirements 0-05 | Audit Approach 0-15 | Fees 0-20 | Total Score |
|----------------|-----------------------|--------------------------------|-----------------------------------------|------------------------------------|------------------------------------|---------------------|-----------|-------------|
| Warren Averett | 18                    | 20                             | 16                                      | 10                                 | 5                                  | 15                  | 89        | 0.00        |
| Purvis Gray    | 20                    | 20                             | 10                                      | 10                                 | 5                                  | 15                  | 110       | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |
|                |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |

| Auditing Services                                                                                                                                                                                                                     |                       |                                |                                         |                                    |                                    |                     |           |             |    |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|--------------------------------|-----------------------------------------|------------------------------------|------------------------------------|---------------------|-----------|-------------|----|
| Reviewer                                                                                                                                                                                                                              |                       |                                |                                         |                                    |                                    |                     |           |             |    |
| <p>Each category for review should receive a score based on the point range provided for each creiteria. The scores will be weighted based on the percentages. The company with the highest score will be the recommended vendor.</p> |                       |                                |                                         |                                    |                                    |                     |           |             |    |
| Company Name                                                                                                                                                                                                                          | Audit Experience 0-20 | Individual Qualifications 0-20 | Size and Structure of Organization 0-20 | Certificate of Achievement of 0-10 | Understanding of Requirements 0-05 | Audit Approach 0-15 | Fees 0-20 | Total Score |    |
| Warren Averett                                                                                                                                                                                                                        | #2 - 19               | #2 - 19                        | #2 - 5                                  | #1 - 10                            | #1 - 5                             | #2 - 14             | #2 - 19   | 0.00        | 91 |
| Purvis Gray                                                                                                                                                                                                                           | #1 - 20               | #1 - 20                        | #1 - 10                                 | #2 - 9                             | #2 - 4                             | #1 - 15             | #1 - 20   | 0.00        | 95 |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |
|                                                                                                                                                                                                                                       |                       |                                |                                         |                                    |                                    |                     |           | 0.00        |    |







# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Action Item

---

TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM: Maryanne Schrader, City Clerk  
DATE: 1/20/2022  
SUBJECT: Update on City Clerk Process

---

**BACKGROUND:**

Report on Office Processes

**DISCUSSION:**

**Records Management** – The City Clerk is responsible for the retention and disposal of City records. I have researched a file cabinet system to easily access current documents, as they are stored in different locations presently. Ordinances, resolutions, and minutes are to be kept in hard copy permanently, so I would like to have storage capacity for those documents. Currently, storage capacity is limited. In that regard, the current system is antiquated, so I am considering an alternative method. I have converted to the standard 8 ½” x 11” paper size, printing the permanent documents on acid-free paper and storing in acid-free boxes. This will save considerable space and save money on the special paper and large binders the documents are stored in presently. I am awaiting a quote from Staples. I am also researching ergonomic desks and chairs for the City Clerk’s office. The normal routine procedure to process Resolutions, record and send Ordinances to MuniCode, State and County, as well as uploading to website is updated. The backlog of minutes and audio have also been processed and uploaded to the website. I have spoken to the Department of State, State Archives, and have a training set for April 14, 2022, for our selected records liaisons, and I will have a telephone consultation in the next few weeks.

Document Imaging (Part of Records Management) is absolutely necessary to search and retrieve documents quickly and efficiently. We currently have Laserfiche, but it is not used to its full potential currently. I have requested the southeast manager for a release from our current vendor and will be transferring to a vendor that I have worked with for over fifteen years. I hope to secure additional training department wide.

The goal for the Clerk’s office is to streamline workflow processes and facilitate communication across departments.

Public Records requests – I plan to research a portal to efficiently track the workflow for the receipt and processing of public records requests. The portal will aid in the submission and tracking of requests to aid in transparency. I have used Next Request with success, however, Just FOIA and GovQA are options to explore for our city, as I determine the best solution within our budget. Since November 15, 2021, I have received 53 requests. Of those, 15 are in pending. Mainly, the requests fare bodycam footage. I have asked departments to ensure all public records request are forwarded to me to process, log, and reply to timely. I am also working to put together a policy and procedure to route the requests timely.

Office processes – Natasha and I have discussed goal setting, and we are on track to work as a team to provide administrative support to the City Council. I am pleased with our working relationship.

Municode – Natasha set up the project and has a good relationship with the representatives. I have spoken to Susan Webb, our account representative, and she has assured me we are on track with the project.

Agenda Automation – I am learning the program; however, it is cumbersome compared to what I have used in the past. I am researching a more user-friendly solution with Civic Engage. I have also created a procedure list, so Natasha is able to fill in for me, if I am unavailable.

Goals – Some benchmarks I hope to achieve within the next year:

- 1) Operational Efficiency/Civic Engagement
- 2) Records Management/Transparency
- 3) Legislative Processes/Legal Compliance
- 4) Review of Codification Process for Municipal Code
- 5) Records Management Training
- 6) Update and Refresh the Clerk's Page on city website

## **GOALS & OBJECTIVES**

This item is consistent with the goals in A New View Strategic Plan 2020 as follows;

**Foundational-** these are the areas of focus that make up the necessary foundation of a successful local government.

*Financial Sustainability-* Achieve long term financial sustainability

*Organizational Capacity, Effectiveness & Efficiency-* To efficiently & effectively provide the highest quality of public services

*Infrastructure-* Satisfy current and future infrastructure needs

*Communication-* To engage, inform and educate public and staff

**Quality of Life-** these areas focus on the overall experience when provided by the city.

*Community Character-* Promote desirable growth with a hometown atmosphere

*Safety-* Ensure the continuous safety of citizens and visitors

*Mobility-* Provide safe, efficient and accessible means for mobility

*Opportunity-* Promote an environment that encourages economic and educational opportunity

*Play-* Expand recreational and entertainment activities within the City

*Community Culture-* Develop a specific identity for Crestview

## **FINANCIAL IMPACT**

City Clerk will return with any financial considerations.

## **RECOMMENDED ACTION**

No action required currently.

## **Attachments**

None



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: Presentation

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM:  
DATE: 1/19/2022  
SUBJECT: City Manager Updates

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## **BACKGROUND:**

The City Manager provides an update on projects throughout the city.

## **DISCUSSION:**

The City Manager will update the City Council on the following projects;

- 1- Animal Control transfer of services to the City of Crestview
- 2- Blackwater Golf Club status update
- 3- Crestview Commons & Hospital Drive extension
- 4- Lead Crestview leadership training program
- 5- Strongest Linc partnership with All-In Credit Union
- 6-Fire training tower construction project
- 7- Splashpad Wilson Street Park
- 8- Code Enforcement blight removal program
- 9- Bowers & Field alleyway property
- 10- Water Tower construction project
- 11- TDC funding plan
- 12- Disc Golf Club partnership
- 13- Annual Report of Investment Activity

## **GOALS & OBJECTIVES**

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*Play*- Expand recreational and entertainment activities within the City

*Community Culture*- Develop a specific identity for Crestview

**FINANCIAL IMPACT**

There is no financial impact for this item.

**RECOMMENDED ACTION**

No action is necessary for this item.

**Attachments**

None



# Staff Report

CITY COUNCIL MEETING DATE: January 24, 2022

TYPE OF AGENDA ITEM: City Manager

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TO: Mayor and City Council  
CC: City Manager, City Clerk, Staff and Attorney  
FROM:  
DATE: 1/20/2022  
SUBJECT: Memorandum of Understanding to Develop City Property

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**BACKGROUND:**

Over the last year, the City Manager has been working with the Okaloosa County Tax Collector to identify a property for a new office. During the discussion it was determined that there may be an opportunity for both agencies to work together on a new facility that will serve both of their needs.

**DISCUSSION:**

In September 2021, the Matrix Design Group completed the City of Crestview Facilities Inventory & Operational study. The study indicated that the offices of the police department were an area of great concern. The current facility is not safe in the event of a storm and does not meet the current needs of the city.

The City currently owns property located around the Community Center. This property was donated to the City with the purpose of constructing governmental facilities such as those that are currently present. After discussions with the Tax Collector, the City manager believes that there is potential to enter into a joint venture that will benefit the City, the County and the surrounding properties.

Initial discussions about this property included the construction of an administration building which could potentially serve the Tax Collector and provide for a safe and adequate space to house the administrative office of the Crestview Police Department.

For this item, the City Manager is requesting City Council approval to work with the Tax Collector's office to draft a Memorandum of Understanding to move forward with creating an agreement to develop the property with the aforementioned plan in mind. If approved, the City Attorney and City Manager will work with Mr. Anderson's office to develop the agreement and bring it back to the City Council at a future meeting.

**GOALS & OBJECTIVES**

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### **FINANCIAL IMPACT**

There is no initial financial impact of this item at this time.

### **RECOMMENDED ACTION**

Staff requests a motion to approve to move forward with the provided concept and to develop a Memorandum of Understanding with the Okaloosa County Tax Collector.

### **Attachments**

None