No. 13240

SERVICE CONTRACT

THIS AGREEMENT is made and entered into on _____, by the City of Pompano Beach ("City") and Stantec Consulting Services Inc., a New York Foreign For-Profit Corporation ("Consultant") authorized to do business in the state of Florida.

WHEREAS, the City requires services which the Consultant is capable of providing under the terms and conditions described herein; and

WHEREAS, Consultant is able and prepared to provide such services to City under the terms and conditions set forth herein, and

WHEREAS, Section 32.39 of the City's Code of Ordinances Competitive Bidding states that before the Procurement and Contracts Director (also known as Purchasing Director) makes any purchase of, or contract for, supplies, materials, capital items, or insurance services in an amount less than seventy-five thousand dollars ($75,000.00), the Procurement and Contracts Director or designee shall obtain a quote from at least one (1) responsible source of supply. In addition to the purchases described herewith, the Procurement and Contracts Director or designee shall have the authority to approve all other purchases in an amount less than two hundred thousand dollars ($200,000.00), with the concurrence of the City Manager.

NOW, THEREFORE, in consideration of those mutual promises and the terms and conditions set forth hereafter, the parties agree as follows:

1. *Contract Documents*. This Agreement consists of the Solicitation RFP26-040 set forth in Exhibit "A," the Consultant's Response set forth in Exhibit "B," the Insurance Requirements set forth in Exhibit "C," all of which are attached hereto and made a part hereof; and all written modifications issued after execution of this Agreement.

In the event of any conflict or inconsistency between this Agreement and the provisions in the incorporated Exhibits, resolution shall be attained by giving precedence in the following order:

(i) this Agreement,
(ii) Exhibit "A", Solicitation, addenda, Recommendation Tabulation, and additional documentation.
(iii) Exhibit "B", Consultant's Response.
(iv) Exhibit "C", Insurance Requirements.

2. *Purpose*. The City, on behalf of its Utilities Department, desires to contract with Consultant to provide Utilities Rate, Financial Planning, and Organizational Services upon the terms and conditions set forth herein.

3. *Scope of Work*. Consultant shall provide the Scope of Services set forth in Exhibit "A," and the Consultant's response set forth in Exhibit "B" (collectively, the "Work"). If the Work requires the Consultant to provide materials or complete the Work within a specified time frame or in accordance with certain plans and specifications, these terms and conditions shall be set forth and included in Exhibit "A" and "B," and the Consultant agrees to provide said materials or Work in accordance therewith. Consultant and Consultant's heirs, executors, administrators, successors, and assigns, do hereby agree to full performance of all covenants contained herein on Consultant's part.

4. *Term of Contract*. This Contract shall be for a term of five (5) years beginning with the date this Contract is fully executed by both parties.

5. *Renewal*. This Contract is not subject to renewal.

6. *Maximum Obligation*. City agrees to pay Consultant for performing the Work and providing the required insurance.

7. *Price Formula, Fee Determination, Payment, Invoices, "Out-of-Pocket" Expenses, and Final Invoice*.

A. Price Formula. City agrees to pay Consultant utilizing Work Authorizations for specific tasks. Each work authorization shall specifically identify the Scope of Work to be performed and the fees for said services. As set forth in RFP26-040, services under this Contract shall comply with the monetary limitations and requirements of §287.055, Florida Statutes, as in effect at the time the applicable Work Authorization is issued. Any Work Authorization in excess of Two Hundred Thousand Dollars ($200,000.00) shall require City Commission approval.

B. Fee Determination. Each individual Work Authorization may be negotiated for fees to be earned by Time and Materials with a Not to Exceed Amount, a Lump Sum, or a combination of both methods for subtasks contained therein. The total amount to be paid by the City under a Work Authorization shall not exceed specified amounts for all services and materials, including "out of pocket" expenses as specified in Subsection E below, and also including any approved subcontracts, unless otherwise agreed in writing by both parties. Consultant shall notify the City's Representative in writing when ninety percent (90%) of the "not to exceed amount" for the total Work Authorization has been reached. The Consultant will bill the City on a monthly basis, or as otherwise provided. Time and Materials billing will be made at the amounts set forth in Exhibit "B" for services rendered toward the completion of the Scope of Work. Where incremental billings for partially completed items are permitted, the total billings shall not exceed the estimated percentage of completion as of the billing date. It is acknowledged and agreed to by the Consultant that the dollar limitation set forth in this section is a limitation upon and describes the maximum extent of City's obligation to pay Consultant, but does not include a limitation upon Consultant's duty to perform all services set forth in Exhibits "A" and "B" for the total compensation in the amount or less than the guaranteed maximum stated above.

C. Payment. All payments by the City shall be made after the Work has been verified and completed. Invoices received by City from Consultant pursuant to this Contract will be reviewed and approved in writing by City's Representative, indicating that services have been rendered in conformity with the Contract, and then will be sent to City's Finance Department for payment. All invoices shall contain a detailed breakdown of the services provided for which payment is being requested. In addition to detailed invoices, upon request of City's Representative, Consultant shall provide City with detailed periodic Status Reports on the project. Unless disputed by City as provided herein, upon City's receipt of a Proper Invoice as defined in § 218.72, Florida Statutes, as amended, City shall forward Consultant payment for Work performed within forty-five (45) days for all goods and services provided.

City may temporarily remove for review any disputed amount, by line item, from an invoice and shall timely provide Consultant written notification of any such disputed charge. Consultant shall provide clarification and a satisfactory explanation to City, along with revised copies of all such documents if inaccuracies or errors are discovered, within ten (10) days of receipt of City's notice of the disputed amount.

In the event City has a claim against Consultant for Work performed hereunder which has not been timely remedied in accordance with the provisions of this Article 7, City may withhold payment for the contested amount, in whole or in part, to protect itself from loss on account of defective Work, claims filed or reasonable evidence indicating probable filing of claims by other parties against Consultant, and/or Consultant's failure to make proper payments to subcontractors or vendors for material or labor. When the reason(s) for withholding payment are removed or resolved in a manner satisfactory to City, payment shall be made.

Resolution of improper payment requests or invoices shall be in accordance with § 218.76, Florida Statutes, as amended.

D. Invoices. Consultant shall submit invoices to the City on a monthly basis.

E. "Out-of-Pocket" Expenses. "Out-of-pocket" expenses shall be reimbursed up to an amount not to exceed the amounts included in each Work Authorization. All requests for payment of "out-of-pocket" expenses eligible for reimbursement under the terms of this Contract shall include copies of paid receipts, invoices, or other documentation acceptable to the City's Representative and to the Finance Department. Such documentation shall be sufficient to establish that the expense was actually incurred and necessary in the performance of the Scope of Work described in a Work Authorization and this Contract. All out-of- pocket, reimbursables, and expenses shall be billed at the actual amount paid by Consultant, with no markup.

F. Final Invoice. In order for both parties herein to close their books and records, the Consultant will clearly state "Final Invoice" on the Consultant's final/last billing to the City. This final invoice shall also certify that all services provided by Consultant have been properly performed and all charges and costs have been invoiced to the City. Because this account will thereupon be closed, any and all other further charges not properly included on this final invoice are waived by the Consultant.

8. *Disputes*. Any factual disputes between the City and the Consultant in regard to this Agreement shall be directed to the City Manager for the City, and such decision shall be final.

9. *Contract Administrators, Notices and Demands*.

A. *Contract Administrators*. During the term of this Agreement, the City's Contract Administrator shall be Renuka Mohammed, Utilities Department Director. The Consultant's Contract Administrator shall be provided by the Consultant upon commencement of services (or their authorized written designee) as further identified below.

B. *Notices and Demands*. A notice, demand, or other communication hereunder by either party to the other shall be effective if it is in writing and sent via registered or certified mail or other trackable delivery service, postage prepaid, to the representatives named below or is addressed and delivered to such other authorized representative at the address as that party, from time to time may designate in writing and forward to the other.

If to Consultant:
Andrew Burnham
Vice President
800 Fairway Drive, Suite 195
Deerfield Beach, FL 33441
Office: (904) 631-5109
Email: Andrew.Burnham@Stantec.com

If to City:
Renuka Mohammed
Utilities Director
100 West Atlantic Blvd
Pompano Beach, FL 33060
Office: (954) 545-7044
Email: Renuka.Mohammed@copbfl.com

With a copy to:
Director of Procurement & Contracts
City of Pompano Beach
Post Office Drawer 1300
Pompano Beach, Florida 33061
Tel: 954-786-4098
Email: purchasing@copbfl.com

10. *Ownership of Documents and Information*. All information, data, reports, plans, procedures or other proprietary rights in all Work items, developed, prepared, assembled or compiled by Consultant as required for the Work hereunder, whether complete or unfinished, shall be owned by the City without restriction, reservation or limitation of their use and made available at any time and at no cost to City upon reasonable written request for its use and/or distribution as City deems appropriate provided City has compensated Consultant for said Work product. City's re-use of Consultant's Work product shall be at its sole discretion and risk if done without Consultant's written permission. Upon completion of all Work contemplated hereunder or termination of this Agreement, copies of all of the above data shall be promptly delivered to the City's Contract Administrator upon written request. The Consultant may not disclose, use, license or sell any work developed, created, or otherwise originated hereunder to any third party whatsoever. The rights and obligations created under this Article shall survive the termination or expiration of this Agreement.

To the extent it exists and is necessary to perform the Work hereunder, City shall provide any information, data, and reports in its possession to Consultant free of charge.

11. *Termination*.

A. Termination for Breach or Default. Breach or default of any of the covenants, duties, or terms of this Agreement shall be cause for termination, in whole or in part, of this Agreement. In the event of a breach or default, the defaulting party shall be given written notice in accordance with Article 9 herein which describes in reasonable detail the alleged breach or default and ten (10) calendar days to cure same. Failure to cure all such described defects within the required time period shall result in termination of this Contract with written notice to Consultant.

B. Termination for Convenience. City retains the right to terminate this Agreement for convenience upon ten (10) business days written notice to Consultant in accordance with Article 9 herein. Such Notice of Termination may include the City's proposed Transition Plan and timeline for terminating the Work, requests for certain Work product documents and materials, and other provisions regarding winding down concerns and activities. City shall compensate Consultant for all authorized Work satisfactorily performed through the termination date under the payment terms set forth in Article 7 above, and all Work product documents and materials shall be delivered to City within ten (10) business days from the Notice of Termination. If any Work hereunder is in progress but not completed as of the date of the termination, then upon City's written approval, this Agreement may be extended until said Work is completed and accepted by City.

12. *Force Majeure*. Neither party shall be obligated to perform any duty, requirement or obligation hereunder if such performance is prevented by fire, hurricane, earthquake, explosion, war, civil disorder, sabotage, accident, flood, acts of nature or by any reason of any other matter or condition beyond the control of either party which cannot be overcome by reasonable diligence and without unusual expense ("Force Majeure"). In no event shall economic hardship or lack of funds be considered an event of Force Majeure. If either party is unable to perform or delayed in their performance of any obligations hereunder by reason of any event of Force Majeure, such inability or delay shall be excused at any time during which compliance therewith is prevented by

such event and during such period thereafter as may be reasonably necessary for either party to correct the adverse effect of such event of Force Majeure.

Consultant must follow all Federal, State, County, and City safety guidelines, including all CDC safety guidelines in effect during the term of this Agreement, including but not limited to social distancing and personal protective equipment. Inability to provide the Work and follow any and all required safety guidelines applicable to the COVID-19 virus or other similar pandemic or emergency, or failure to follow such requirements, including but not limited to, social distancing, shall constitute grounds for immediate cancellation of this Agreement unilaterally by the City upon written notice, which may be provided via registered or certified mail or other trackable delivery service.

13. *Insurance*. Consultant shall maintain insurance in accordance with Exhibit "C" throughout the term of this Agreement.

14. *Indemnification*. Except as expressly provided herein, no liability shall attach to the City by reason of entering into this Agreement.

A. Consultant shall at all times indemnify, defend, save and hold harmless the City, its officers, officials, employees, volunteers and other authorized agents from and against any and all claims, demands, suit, damages, attorneys' fees, fines, losses, penalties, defense costs or liabilities suffered by the City arising directly or indirectly from Consultant's performance under this Contract, including but not limited to, any act, breach, omission, negligence, recklessness or misconduct of Consultant and/or any of its agents, officers, or employees hereunder, including any inaccuracy in or breach of any of the representations, warranties or covenants made by the Consultant, its agents, officers and/or employees, in the performance of services of this contract. Consultant agrees to investigate, handle, respond to, provide defense for, and defend any such claims at its sole expense and to bear all other costs and expenses related thereto, even if the claim(s) is/are groundless, false, or fraudulent. To the extent considered necessary by City, any sums due Consultant hereunder may be retained by City until all of City's claims for indemnification hereunder have been settled or otherwise resolved, and any amount withheld shall not be subject to payment of interest by City.

B. Consultant acknowledges and agrees that City would not enter into this Agreement without Consultant's indemnification of the City. The parties agree that one percent (1%) of the total compensation paid to Consultant hereunder shall constitute specific consideration to Consultant for the indemnification provided under this Article, and these provisions shall survive expiration or early termination of this Agreement.

15. *Sovereign Immunity*. Nothing in this Agreement shall constitute a waiver by the City of its sovereign immunity limits as set forth in section 768.28, Florida Statutes. Nothing herein shall be construed as consent from either party to be sued by third parties.

16. *Non-Assignability and Subcontracting*.

A. *Non-Assignability*. This Agreement is not assignable, and Consultant agrees it shall not assign or otherwise transfer any of its interests, rights, or obligations hereunder, in whole or in part, to any other person or entity without City's prior written consent, which must be sought in writing not less than fifteen (15) days prior to the date of any proposed assignment. Any attempt by Consultant to assign or transfer any of its rights or obligations hereunder without first obtaining City's written approval shall not be binding on City and, at City's sole discretion, may result in City's immediate termination of this Agreement, whereby City shall be released of any of its obligations hereunder. In addition, this Agreement and the rights and obligations herein shall not be assignable or transferable by any process or proceeding in court, or by judgment, execution, proceedings in insolvency, bankruptcy, or receivership. In the event of Consultant's insolvency or bankruptcy, City may, at its option, terminate and cancel this Agreement without any notice of any kind whatsoever, in which event all rights of Consultant hereunder shall immediately cease and terminate.

B. *Subcontracting*. Upon request, the Consultant will provide the City with a list of subcontractors for whom a portion of services may include direct member contact with significant access to member data. Consultant remains responsible for any and all contractual obligations hereunder and shall also be responsible to ensure that none of its proposed subcontractors are listed on the *Convicted Vendors List* referenced in accordance with the provisions of Article 28 below.

17. *Performance Under Law*. The Consultant, in the performance of duties under the Agreement, agrees to comply with all applicable local, state, and/or federal laws and ordinances, including, but not limited to, standards of licensing, conduct of business, and those relating to criminal activity, and the Americans with Disabilities Act (ADA).

18. *Audit and Inspection Records*. The Consultant shall permit the authorized representatives of the City to inspect and audit all data and records of the Consultant, if any, for the sole purpose of determining compliance with the terms of the award of this Contract until the expiration of two (2) years after final payment under this Contract.

19. A. *Adherence to Law*. Both parties shall adhere to all applicable laws governing their relationship with their employees including, but not limited to, laws, rules, regulations and policies concerning worker's compensation, unemployment compensation and minimum wage requirements.

B. *Conflict of Interest.* During the time period this Agreement is in effect, Consultant, its employees, subcontractors, and agents shall not engage in any conduct or activities that would constitute a conflict of interest, and shall otherwise avoid any appearance of such conflict of interest. Additionally, Consultant, its employees, subcontractors, and agents shall refrain from acting adverse to the City's interest in promoting the goals and objectives of this Agreement. Any potential such conflict of interest must be reported to the City and may be waived only upon additional review and approval by the City Manager.

Furthermore, none of Consultant's employees, subcontractors, and agents shall, during the term of this Agreement, serve as an expert witness against City in any legal or administrative proceeding in which he, she, or Consultant is not a party, unless compelled by court process. Further, such persons shall not give sworn testimony or issue a report or writing, as an expression of his or her expert opinion, which is adverse or prejudicial to the interests of City in connection with any such pending or threatened legal or administrative proceeding unless compelled by court process. The limitations of this section shall not preclude Consultant or any persons in any way from representing themselves, including giving expert testimony in support thereof, in any action or in any administrative or legal proceeding.

The existence of any such conflict of interest, or evidence of non-compliance with the above paragraphs, may serve as grounds for termination of this Agreement pursuant to Paragraph 11, Termination.

20. *Independent Contractor*. The Consultant shall be deemed an independent contractor for all purposes, and the employees of the Consultant or any of its contractors, subcontractors and the employees thereof, shall not in any manner be deemed to be employees of City. As such, the employees of the Consultant, its contractors or subcontractors, shall not be subject to any withholding for tax, social security or other purposes by City, nor shall such Consultant, subcontractor or employee be entitled to sick leave, pension benefits, vacation, medical benefits, life insurance, workers or unemployment compensation or the like from City.

21. *Consultant Cooperation*. The Consultant recognizes that the performance of this Contract is essential to the provision of vital public services and the accomplishment of the stated goals and mission of City. Therefore, the Consultant shall be responsible to maintain a cooperative and good faith attitude in all relations with City and shall actively foster a public image of mutual benefit to both parties. The Consultant shall not make any statements or take any actions detrimental to this effort.

22. *Public Records*.

A. The City of Pompano Beach is a public agency subject to Chapter 119, Florida Statutes. The Consultant shall comply with Florida’s Public Records Law, as amended. Specifically, the Consultant shall:

1. Keep and maintain public records required by the City in order to perform the service.

2. Upon request from the City’s custodian of public records, provide the City with a copy of requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes or as otherwise provided by law.

3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Consultant does not transfer the records to the City.

4. Upon completion of the contract, transfer, at no cost to the City, all public records in possession of the Consultant, or keep and maintain public records required by the City to perform the service. If the Consultant transfers all public records to the City upon completion of the contract, the Consultant shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Consultant keeps and maintains public records upon completion of the contract, the Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the City, upon request from the City's custodian of public records in a format that is compatible with the information technology systems of the City.

B. Failure of the Consultant to provide the above-described public records to the City within a reasonable time may subject Consultant to penalties under 119.10, Florida Statutes, as amended.

PUBLIC RECORDS CUSTODIAN

IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

CITY CLERK
100 W. Atlantic Blvd., Suite 253
Pompano Beach, Florida 33060
(954) 786-4611
RecordsCustodian@copbfl.com

23. *Governing Law; Venue; Waiver of Jury Trial*. This Agreement shall be interpreted and construed in accordance with and governed by the laws of the State of Florida. The exclusive venue for any litigation arising from, related to, or in connection with this Agreement shall be in the Seventeenth Judicial Circuit in and for Broward County, Florida, or in the United States District Court for the Southern District of Florida, or United States Bankruptcy Court for the Southern District of Florida, as applicable. BY ENTERING INTO THIS AGREEMENT, THE PARTIES EXPRESSLY WAIVE ANY RIGHTS EITHER PARTY MAY HAVE TO A TRIAL BY JURY OF ANY CIVIL LITIGATION RELATED TO THIS AGREEMENT.

24. *Waiver and Modification*.

A. No waiver made by either party with respect to performance, manner, time, or any obligation of either party or any condition hereunder shall be considered a waiver of that party's rights with respect to the particular obligation or condition beyond those expressly waived in writing or a waiver of any other rights of the party making the waiver or any other obligations of the other party.

B. *No Waiver by Delay*. The City shall have the right to institute such actions or proceedings as it may deem desirable for effectuating the purposes of this Agreement provided that any delay by City in asserting its rights hereunder shall not operate as a waiver of such rights or limit them in any way. The intent of this provision is that City shall not be constrained to exercise such remedy at a time when it may still hope to otherwise resolve the problems created by the default or risk nor shall any waiver made by City with respect to any specific default by Consultant be considered a waiver of City's rights with respect to that default or any other default by Consultant.

C. Either party may request changes to modify certain provisions of this Agreement; however, unless otherwise provided for herein, any such changes must be contained in a written amendment executed by both parties with the same formality of this Agreement.

25. *No Contingent Fee*. Consultant warrants that other than a bona fide employee working solely for Consultant, Consultant has not employed or retained any person or entity, or paid or agreed to pay any person or entity, any fee, commission, gift or any other consideration to solicit or secure this Agreement or contingent upon or resulting from the award or making of this Agreement. In the event of Consultant's breach or violation of this provision, City shall have the right to terminate this Agreement without liability and, at City's sole discretion, to deduct from the Price Formula set forth in Article 7 or otherwise recover the full amount of such fee, commission, gift or other consideration.

26. *Attorneys' Fees and Costs*. In the event of any litigation involving the provisions of this Agreement, both parties agree that the prevailing party in such litigation shall be entitled to recover from the non-prevailing party reasonable attorney and paraprofessional fees as well as all out-of-pocket costs and expenses incurred thereby by the prevailing party in such litigation through all appellate levels.

27. *No Third-Party Beneficiaries*. Consultant and City agree that this Agreement and other agreements pertaining to Consultant's performance hereunder shall not create any obligation on Consultant or City's part to third parties. No person not a party to this Agreement shall be a third-party beneficiary or acquire any rights hereunder.

28. *Public Entity Crimes Act*. As of the full execution of this Agreement, Consultant certifies that in accordance with §287.133, Florida Statutes, it is not on the *Convicted Vendors List* maintained by the State of Florida, Department of General Services. If Consultant is subsequently listed on the *Convicted Vendors List* during the term of this Agreement, Consultant agrees it shall immediately provide City written notice of such designation in accordance with Article 9 above.

29. *Entire Agreement*. This document incorporates and includes all prior negotiations, correspondence, conversations, agreements or understandings applicable to the matters contained herein, and the parties agree that there are no commitments, agreements or understandings concerning the subject matter of this Agreement that are not contained in this document. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior representations or agreements, whether oral or written.

30. *Headings*. The headings or titles to Articles of this Agreement are not part of the Agreement and shall have no effect upon the construction or interpretation of any part of this Agreement.

31. *Counterparts*. This Agreement may be executed in one (1) or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one (1) and the same instrument. A photocopy, email or facsimile copy of this Agreement and any signatory hereon shall be considered for all purposes as original.

32. *Approvals.* Whenever CITY approval(s) shall be required for any action under this Agreement, said approval(s) shall not be unreasonably withheld.

33. *Absence of Conflicts of Interest.* Consultant represents that it presently has no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with their performance under this Agreement and that no person having any conflicting interest shall be employed or engaged by either party in its performance under this Agreement.

34. *Binding Effect.* The benefits and obligations imposed pursuant to this Agreement shall be binding and enforceable by and against the parties hereto.

35. *Employment Eligibility*. By entering into this Contract, the Consultant becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility." This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. Any challenge to termination under this provision must be filed in the Circuit or County Court no later than twenty (20) calendar days after the date of termination. If this Contract is terminated for a violation of the statute by the Consultant, the Consultant may not be awarded a public contract for a period of one (1) year after the date of termination.

36. *Scrutinized Companies.* By execution of this Agreement, in accordance with the requirements of F.S. 287.135 and F.S. 215.473, Consultant certifies that Consultant is not participating in a boycott of Israel. Consultant further certifies that Consultant is not on the Scrutinized Companies that Boycott Israel list, not on the Scrutinized Companies with Activities in Sudan List, and not on the Scrutinized Companies with Activities in Iran Terrorism Sectors List, nor has Consultant been engaged in business operations in Syria. Subject to limited exceptions provided in state law, the City will not contract for the provision of goods or services with any scrutinized company referred to above. In accordance with Section 287.135, Florida Statutes as amended, a company is ineligible to, and may not, bid on, submit a proposal for, or enter into or renew a contract with any agency or local government entity for goods or services of:

A. Any amount if, at the time of bidding on, submitting a proposal for, or entering into or renewing such contract, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, Florida Statutes, or is engaged in a boycott of Israel; or

B. One million dollars ($1,000,000.00) or more if, at the time of bidding on, submitting a proposal for, or entering into or renewing such contract, the company:

1. Is on the Scrutinized Companies with Activities in Sudan List of the Scrutinized Companies with Activities in Iran Terrorism Sectors List, created pursuant to Section 215.473, Florida Statutes; or

2. Is engaged in business operations in Syria.

C. Submitting a false certification or being placed on a list created pursuant to Section 215.473, Florida Statutes relating to scrutinized active business operations in Iran after Consultant has submitted a certification, shall be deemed a material breach of contract. The City shall provide notice, in writing, to Consultant of the City's determination concerning the false certification. Consultant shall have five (5) days from receipt of notice to refute the false certification allegation. If such false certification is discovered during the active contract term, Consultant shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination of false certification was made in error. If Consultant does not demonstrate that the City's determination of false certification was made in error then the City shall have the right to terminate the contract and seek civil remedies pursuant to Section 287.135, Florida Statutes, as amended from time to time.

37. *Affidavit of Compliance with Anti-Human Trafficking Laws.* In accordance with section 787.06 (13), Florida Statutes, the undersigned, on behalf of the entity listed below ("Entity"), hereby attests under penalty of perjury that:

A. Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes, entitled "Human Trafficking".

38. *Affidavit of Compliance with Foreign Entity Laws.* The undersigned, on behalf of the entity listed below ("Entity"), hereby attests under penalty of perjury as follows:

A. Entity is not owned by the government of a foreign country of concern as defined in Section 287.138, Florida Statutes.

B. The government of a foreign country of concern does not have a controlling interest in Entity.

C. Entity is not organized under the laws of, and does not have a principal place of business in, a foreign country of concern.

D. Entity is not owned or controlled by the government of a foreign country of concern, as defined in Section 692.201, Florida Statutes.

E. Entity is not a partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a foreign country of concern, as defined in Section 692.201, Florida Statutes, or a subsidiary of such entity.

F. Entity is not a foreign principal, as defined in Section 692.201, Florida Statutes.

G. Entity is in compliance with all applicable requirements of Sections 692.202, 692.203, and 692.204, Florida Statutes.

39. *Annual Budgetary Funding/Cancellation*. This Agreement and all obligations of the City hereunder requiring the expenditure of funds are subject to and contingent upon annual budgetary funding and appropriations by the City Commission.

40. *Severability*. Should any provision of this Agreement or the applications of such provisions be rendered or declared invalid by a court action or by reason of any existing or subsequently enacted legislation, the remaining provisions of this Agreement shall remain in full force and effect.

THE REMAINDER OF THE PAGE IS INTENTIONALLY LEFT BLANK

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed the day and year hereinabove written.

Attest:

CITY OF POMPANO BEACH

_____
KERVIN ALFRED, CITY CLERK

By:_____
REX HARDIN, MAYOR

By:_____
GREGORY P. HARRISON, CITY MANAGER

APPROVED AS TO FORM:

_____
MARK E. BERMAN, CITY ATTORNEY

(SEAL)

"CONSULTANT"

Stantec Consulting Services Inc.

Witnesses:

By: _____
Andrew Burnham, Vice President

Logan Standard
(Print or Type Name)

Hani Alkhouli
(Print or Type Name)

STATE OF Florida

COUNTY OF Hillsborough

The foregoing instrument was acknowledged before me, by means of ☒ physical presence or ☐ online notarization, this 8th day of July, 2026, by Andrew Burnham, Vice-President of Stantec Consulting Services Inc., a New York corporation, who is personally known to me or who has produced _____ as identification.

NOTARY'S SEAL:

GERI L REESE
Notary Public - State of Florida
Commission # HH 806206
My Comm. Expires May 25, 2030
Bonded through National Notary Assn.

Geri L Reese
NOTARY PUBLIC, STATE OF Florida

Geri L Reese
(Name of Acknowledger Typed, Printed or Stamped)

HH 806206
Commission Number

Exhibit A – Cover Page

Recommendation Tabulation

Solicitation

Addendum

Procurement and Contracts Department
Mary Rivero, Director
mary.rivero@copbfl.com

RFP #: RFP26-040

Tentative City Commission Meeting Date*: TBD

RFP Title: Utilities Rate, Financial Planning, and Organizational Services

Notified: 1139 # Downloaded: 3

of Responses Rec'd: 2 # of "No Bids": 1

For: Utilities Department (Department)

RFP Opening Date: 05/21/2026

POSTING OF RFP RECOMMENDATION/TABULATION: RFP Recommendations and Tabulations will be posted in the eBid System IonWave and will remain posted for 72 hours. Any person who may be adversely affected by the decision or intended decision shall file a notice of protest in writing within 72 hours of posting the notice of the decision or intended decision. The formal written protest shall be filed within ten (10) days after the date the notice of protest is filed. Failure to file a notice of protest or a formal written protest shall constitute a waiver of proceedings under this chapter. Section 120.57(3)(b), Florida Statutes, states that "The formal written protest shall state with particularity the facts and law upon which the protest is based." Saturdays, Sundays, state holidays, and days when the City is closed shall be excluded from the computation of the 72-hour time period provided. Filings shall be at the office of the Director of Procurement and Contracts, 1101 NE 5th Avenue, Pompano Beach, FL 33060. Any person who files an action protesting an intended decision shall post with the City, at the time of filing the formal written protest, a protest bond, payable to the City of Pompano Beach, Florida, in an amount equal to one percent (1%) of the estimated value of the contract. Failure to submit the protest bond within the time allowed for filing a bond shall constitute a waiver of the right to protest. Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, or failure to post the protest bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.

(*) The "Cone of Silence" shall terminate upon the City's award or approval of a contract, rejection of all proposals or responses, or any other formal action that concludes the solicitation or other procurement process. For confirmation of the official termination date of the Cone of Silence, contact the Purchasing Agent of record.

RECOMMENDATION TABULATION

The City of Pompano Beach, Florida, received two (2) proposals for RFP26-040 Utilities Rate, Financial Planning, and Organizational Services from the following vendors: Willdan Financial Services and Stantec Consulting Services, Inc.

On 5/27/2026, a committee evaluated proposals in a public meeting. The rankings of the two (2) proposals are below:

Proposal	Score	Ranking
(1) Stantec Consulting Services, Inc.	351.00	Highest Ranked
(2) Willdan Financial Services	322.00	2ND Highest Ranked

The review of all proposals received confirmed that Stantec Consulting Services, Inc. and Willdan Financial Services meet all requirements outlined in the RFP. After all ranking totals were provided, using the scoring criteria outlined in section 7.3 of the solicitation. It is the recommendation of the committee to bring to the commission '**Stantec Consulting Services, Inc.'**, and '**Willdan Financial Services'** for award.

By: Michael Lee (Purchasing Agent) Date: 05/28/2026

Florida's Warmest Welcome

REQUEST FOR PROPOSALS (RFP)

RFP26-040 - Utilities Rate, Financial Planning, and Organizational Services

RFP OPENING: May 18, 2026, at 2:00 PM
Virtual Zoom Meeting
For access, go to:
https://www.pompanobeachfl.gov/meetings

April 23, 2026

Dear Prospective Proposers,

SUBJECT: REQUEST FOR PROPOSALS (RFP) RFP26-040 - Utilities Rate, Financial Planning, and Organizational Services

The City of Pompano Beach (the “City”) is interested in receiving proposals in response to the attached RFP for Utilities Rate, Financial Planning, and Organizational Services.

Proposers must be registered on the City’s eBid System to view the solicitation documents and respond to this solicitation. The complete solicitation document can be downloaded free of charge from the eBid System at https://pompanobeachfl.ionwave.net/. Proposals must bear the electronic signature of an authorized officer of the Proposer who is legally authorized to enter into a contractual relationship in the Proposer's name. THE CITY will consider the submittal of a proposal as constituting an offer by the Proposer to perform the required services at the prices stated herein. The City is not responsible for the accuracy or completeness of any documentation the Proposer receives from any source other than the eBid System. The Proposer is solely responsible for downloading all required documents. Responses will be electronically unsealed in a public forum and read aloud.

Proposals must be submitted electronically at (https://pompanobeachfl.ionwave.net), referred to hereinafter as the eBid System, on or before the date and time stated in **Section 2 —Schedule of Events. Proposals received after 2:00:00 p.m. ET on the due date will not be considered, and late bids will not be accepted**.

Cone of Silence shall take effect once this solicitation is released to the General Public and shall remain in effect until the City Commission has taken final action to approve or reject an award, or otherwise terminate the solicitation. During the Cone of Silence period, Respondents to this solicitation, or persons acting on their behalf, including lobbyists, shall not communicate, directly or indirectly, regarding any aspect of this solicitation with any member of the City Commission, the City Clerk, the City Manager’s Office, any Evaluation Committee member, or any other City of Pompano Beach employee, except in writing to the Procurement and Contracts Department staff as expressly permitted in this solicitation. Violation of the Cone of Silence may be grounds for rejection of a Proposal or other appropriate action as permitted by City ordinance.

All communications must go through the eBid System (IonWave) or the Purchasing Agent assigned to this solicitation, Eric Seifer, at (954)786-4166, or eric.seifer@copbfl.com. Any information that amends any portion of this solicitation received by any method other than an Addendum issued through IonWave is not binding on the City of Pompano Beach.

Carefully read all portions of the RFP document to ensure the Proposer's bid fully complies with all requirements.

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1. DEFINITIONS

The following words, when used in this RFP, shall have the meanings ascribed to them, except where the context indicates a different meaning:

- ***"Bid"*** means an offer or "Proposal" submitted by a Proposer in response to any formal bid or solicitation. The terms "***Bid"*** **and "*Proposal"*** may be used interchangeably throughout this RFP.
- ***"Contract"*** means any agreement resulting from this RFP. ***"Contract" and "Agreement"*** may be used interchangeably throughout this RFP.
- **"Project"** means Utilities Rate, Financial Planning, and Organizational Services, including rate studies, financial modeling, policy development, and organizational assessments.
- "***Project Team***" means the Proposer, Other Team Members, and any subcontractors proposed by a Proposer in response to this solicitation.
- "***Proposer***" means the company/firm, corporation, joint venture, partnership, individual, or other legal entity submitting a Proposal to this RFP. The terms Proposer and Contractor may be used interchangeably throughout this RFP.
- "***Team Member(s)***" means each entity, as found in the organizational chart submitted within the Proposal, that will perform a lead role in the Project.
- "***Proposal***" means the complete response of the Proposer to the RFP, including adequately completed forms and supporting documentation. The terms "Proposal" and "Solicitation" may be used interchangeably throughout this RFP. The insurance requirements described herein reflect those deemed necessary by the City for the agreement/contract.
- *"**Budget**"* A written projection of all receipts and expenditures for the City's utility systems for each fiscal year.
- *"**Emergency Expenses***" Expenses as declared by the City or that are made in the event of an emergency due to weather, vehicular accidents, criminal incidents, or other acts of God that are necessary to protect the safety and welfare of the general public and the City's employees and vendors.
- *"**Fiscal Year**"* Each fiscal year starts on October 1st and ends on the 30th day of September of the following year (e.g., Fiscal Year 2026 will be from October 1, 2025, to September 30, 2026).

2. SCHEDULE OF EVENTS

RFP Number:	**RFP26-040**
RFP Title:	**Utilities Rate, Financial Planning, and Organizational Services**
Release Date:	**April 23, 2026**
Date Published In Sun-Sentinel	**April 23, 2026**
Written Questions and Inquiries Are Due On Or Before:	**May 6, 2026, at 5:00 PM**
RFP Responses Due Date/Time:	**May 18, 2026, at 2:00 PM**
Evaluation Committee Meetings	**May 27, 2026**
Recommendation For Award:	**TBD**
Direct All Inquiries To:	**https://pompanobeachfl.ionwave.net**
E-Proposal Submittals Only:	**https://pompanobeachfl.ionwave.net**
Proposal Virtual Opening:	**https://www.pompanobeachfl.gov/meetings**

3. INTRODUCTION AND GENERAL INFORMATION

3.1. Summary

The City of Pompano Beach (the "city") seeks proposers to provide professional financial advisory and related services on an as-needed basis, as authorized through periodic work authorizations issued by the City. Such services may include, but are not limited to, assistance with budgeting and forecasting; rate-making and rate studies; management and cost accounting; support for financing activities; financial and operational analysis of utility systems; preparation of annual reports required under bond covenants and other loan agreements; and organizational assessments. The Firm may be required to perform additional related services as deemed necessary by the City.

3.2. Background

The City of Pompano Beach (the “City”) is located in Broward County, Florida, between Palm Beach County and Miami-Dade County. The City serves a year-round population of approximately 113,691 residents, which increases to nearly 150,000 during the peak seasonal period from September through March. The City encompasses approximately 25 square miles, including approximately 1.4 square miles of inland waters.

The City owns and operates enterprise utilities, comprising the Water and Sewer Utility Fund and the Stormwater Fund (collectively, the “System”), that provide potable water, wastewater collection, reuse water, and stormwater management services. The System serves customers within the City limits, as well as select wholesale and retail customers in neighboring jurisdictions. Potable water service is provided to portions of the Town of Lauderdale-by-the-Sea (the “Town”) and the City of Lighthouse Point (“Lighthouse Point”), and wastewater collection services are provided to a portion of the Town.

The City’s water system includes a 40 million gallons per day (“MGD”) lime softening treatment plant and a 10 MGD nanofiltration membrane softening treatment plant, with a combined design capacity of 50 MGD and a current Florida Department of Environmental Protection (FDEP) permitted capacity of 30 MGD. The system also includes approximately 290 miles of transmission and distribution mains, two wellfields, and associated storage and pumping facilities.

The City operates a wastewater collection system comprising approximately 259 miles of gravity sewers and force mains, and 82 lift stations. The City does not operate a wastewater treatment plant, but rather conveys wastewater flows to the Broward County North Regional Wastewater Treatment Plant (NRWWTP) for treatment under an interlocal agreement with Broward County.

The reuse water system includes a 7.5 MGD treatment facility that produces reclaimed water from Broward County-treated effluent for irrigation use, including municipal facilities, roadway medians, parks, and residential customers. The City provides reuse service to Lighthouse Point through an interlocal agreement and supplies reclaimed water via a master meter to customers in Pompano Highlands within the Broward County Water and Wastewater Services (BCWWS) service area.

The City of Pompano Beach operates and maintains its own stormwater management facilities within the City's right-of-way and properties to provide flood control and water quality treatment within the City limits. Existing drainage facilities within the City include catch basins, manholes, control structures, gravity pipes, exfiltration trench, retention areas, outfalls, and canals that connect to the Intracoastal Waterway.

The System operates as enterprise funds supported primarily by user fees and charges. Customers located outside the City’s boundaries are generally subject to a 25% (percent) surcharge for water, wastewater, and reuse services, unless otherwise defined by interlocal or service agreement

3.3. Term of Contract

The City anticipates awarding a Service Agreement for an initial term of five (5) years. Rates and all other negotiated expenses shall remain in effect for the duration of the initial contract term and any approved renewal terms unless otherwise modified by mutual written agreement of the parties. Additional services or responsibilities may be added to the Agreement only by written amendment executed by both parties.

In the event a replacement agreement or renewal cannot be completed prior to the expiration of the Agreement, the City reserves the right, at its sole discretion, to extend the Agreement for a period not to exceed one hundred eighty (180) days, under the same terms, conditions, and pricing, to ensure continuity of services.

3.4. Proposal Submittal Due Date

The City will receive sealed proposals by **May 18, 2026, at 2:00 PM**. Proposals must be submitted electronically through the eBid System on or before the due date/time stated above. Any proposal received after the due date will not be considered.

3.5. Questions and Communication

http://www.pompanobeachfl.ionwave.net is the official method used by the Procurement and Contracts Department, which has approved the distribution and communication of all competitive solicitations. All questions regarding this RFP must be submitted using the Questions feature in the eBid System on or before **May 6, 2026, at 5:00 PM** via http://www.pompanobeachfl.ionwave.net/. Questions received after this date and time will not be answered. Questions submitted by Proposers will be answered through the IonWave Questions feature or via Addenda, if necessary. Any verbal or written information obtained from sources other than the information included in this RFP document or by an Addendum shall not be binding on the City.

4. SCOPE OF SERVICES

4.1. Scope of Work

The City of Pompano Beach, FL, is seeking proposals from qualified firms to provide comprehensive Utilities Rate, Financial Planning, and Organizational Services. The selected firm will assist the City in evaluating and developing utility rates, financial planning, and organizational strategies to ensure the sustainability and efficiency of the City's utility services. The services will include, but are not limited to, rate studies, financial forecasting, cost-of-service analysis, and organizational assessments.

4.1.1. Revenue Sufficiency Analysis

Develop a multi-year financial feasibility analysis (including 5-, 10-, 15-, and 20-year planning horizons) that integrates operational, capital, and financial policy requirements. The analysis shall include, but is not limited to:

- Development of a five and ten-year revenue requirement and rate projection model, with interim projections out to a fifteen and twenty-year planning horizon
- Forecasting of operating expenses, capital funding needs, cost recovery, and reserve requirements
- Evaluation of capital financing strategies, including debt issuance versus pay-as-you-go funding
- Scenario modeling to assess key variables, including:
    - Capital Replacement Plan (CRP)
    - Capital Improvement Plan (CIP) timing and prioritization alternatives
    - Regulatory compliance cost impacts
    - Debt issuance timing, structure, and affordability
- Identification of required rate adjustments to maintain financial sustainability and policy compliance
- Integration of financial policies, including reserve targets and debt service coverage requirements
- Sensitivity analysis to evaluate risks related to demand fluctuations, inflation, and growth assumptions
- Semi-annual updates to the financial projection model during the study period.
- Review and update assumptions at least annually to align with evolving priorities, including capital improvement needs, regulatory requirements, and system demand

4.1.2. Financial Policy Development

Review, evaluate, and recommend updates to the City’s financial policies, including but not limited to:

- Debt service coverage ratio targets
- Reserve policies (Operating, Debt, Renewal & Replacement, Emergency)
- Allocation and differentiation policies for contributions to the City’s general fund, Utilities operating, capital, and reserve funds.
- Minimum and target working capital/cash balances
- Capital financing strategy (debt, pay-go, grants, SRF, WIFIA, federal/state funding)
- Implement a capital improvement surcharge with restricted-use proceeds dedicated to capital planning for aging assets located outside the city boundaries.
- Prepare financial feasibility reports in support of the issuance of revenue bonds or securing debt financing for capital or major operational programs, including preparing for and attending presentations before rating agencies, bond insurance companies, potential investors and purchasers of instruments of debt, and other required parties.
- Advise (financial, not legal) the City in the preparation of loan documents to obtain funding from agencies such as the Florida Department of Environmental Protection, banks, and other lending agencies.
- Best-practice alignment with peer utilities and industry standards
- Perform benchmarking analysis, reserve levels, and financial policy benchmarks
- Ensure compliance with all relevant standards, including American Water Works Association (AWWA) guidelines and Governmental Accounting Standards Board (GASB) requirements.

4.1.3. Rate Structure Analysis

A comprehensive review of the City's current rate structure to ensure affordability, transparency, and policy alignment. Tasks include, but are not limited to:

- Review of existing customer class usage and provide recommendations based on Florida rate, including consumption pattern analysis
- Evaluation of fixed vs. volumetric revenue balance
- Review of tier structures and inclining block methodology, taking conservation into consideration
- Evaluate and make recommendations on an approach for cost allocation for surcharge cost levied on boundary municipalities for capital improvement expenses attributable solely to their systems
- Review and analyze the annual Lauderdale-by-the-Sea true-up calculations and provide recommendations to ensure full cost recovery for current operations and future capital improvements.
- Advise on large user or pass-through agreements and service contracts, e.g., Broward County Wastewater Agreement, Lighthouse Point Reuse Agreement, to ensure full cost recovery for current operations and future capital improvements. Services may include drafting agreements, reviewing documents, negotiating among affected parties, and performing financial or economic analyses required for evaluation.
- GIS integration for parcel, customer class, and service area alignment
- Revenue elasticity modeling
- Affordability analysis, including evaluation of customer assistance options
- Address growth and projected demands for both Water and Sewer into the rate structure
- Identification of rate structure modifications to meet the City's objectives of
    - Fiscal stability
    - Equity and proportionality
    - Conservation and efficiency
    - Regulatory and cost-of-service compliance
- Perform benchmarking analysis for rate structure comparisons (e.g., fixed and volumetric fee, tier count, block size, inclining block steepness, etc.)

4.1.4. Utility Billing and Data Review

Perform a comprehensive review of utility billing, consumption, and financial data systems to support accurate rate development and revenue analysis as needed, including:

- Review utility billing data and revenue records for accuracy and consistency
- Develop familiarity with the City's utility billing system and financial systems
- Perform revenue reconciliation and consumption validation analyses
- Identify data limitations and recommend improvements where appropriate

4.1.5. Development Services Process

Develop a Utility development services process and fee structure, including:

- Workflow process for assessment, including application intake, fee collection, plan review, permitting, inspections, meter installation, and final acceptance.
- Provide a standardized developer agreement template, including roles and responsibilities, construction requirements, asset transfer, and acceptance procedures.
- Assess and recommend updates to development-related fees (e.g., cost recovery fees, capacity charges, connection fees) to ensure alignment with actual service costs and equitable cost allocation.
- Ensure fees and policies support capital improvement needs and appropriate funding of growth-related infrastructure.
- Recommend standardized procedures for fee collection, permitting, inspections, testing, and transfer of assets, including documentation and system integration.
- Documentation & Implementation: Prepare clear documentation of recommended fees, policies, and procedures, and ordinance updates to support implementation.

4.1.6. Miscellaneous Service Charges Review

Evaluate and provide cost-based recommendations for all miscellaneous water and sewer service charges, including but not limited to:

- Connection fees
- Tap fees
- Meter installation charges
- Service turn-on/turn-off fees
- Late/delinquency fees
- Miscellaneous field service charges
- Collection's system assessment fees
- Tampering fees

4.1.7. Grant Assistance

Support the identification, application, development, and implementation of grant assistance programs, with a focus on affordability and equity. Services may include, but are not limited to:

- Identification and assistance to apply for applicable federal, state, and local grant or other funding opportunities
- Development of low-income and fixed-income customer assistance programs, inclusive of eligibility criteria and administrative processes
- Integration of assistance programs into the overall rate structure and financial plan.

4.1.8. Organizational Structure

The Consultant shall evaluate the Utilities Department's current and future organizational needs, including:

- Organizational structure assessment to enhance functionality and efficiency, and facilitate the adoption of digital and transformational platforms to meet current and future industry standards.
- Assist with strategic implementation and training strategies to facilitate organizational change management.
- Review operations of each division, staffing hierarchy and levels, position classifications and job descriptions, compensation, and pay range comparison
- Recommendations for restructuring, inclusive of positions needed to meet operational and regulatory demands.
- Assist in the development of performance metrics and key performance indicators (KPIs) to monitor and improve organizational performance
- Advise on succession planning, knowledge retention planning, and assessment.

4.1.9. Communication Tools & Public Engagement Support

Provide communication tools to support both internal decision-making and public outreach:

- Excel-based, user-friendly financial and rate model with instructions
- Visual aids illustrating rate impacts, financial trends, and policy options
- Policy briefs and executive summaries
- Public workshop materials and presentations
- Provide updates to ordinances, resolutions, and policies necessary to implement recommendations.
- Presentations to City Commission and stakeholder groups
- Coordination and collaboration with various internal and external stakeholders, including Administration, Budget, Finance, Engineering, Planning & Zoning, Legal, Private Entities, and the Public as needed.

4.1.10. Deliverables

All deliverables must be provided in electronic format at a minimum, and in other formats as requested by the City. Deliverables can be, but are not limited to:

- Multi-year financial plan and rate model (e.g., Excel-based)
- Revenue sufficiency analysis report
- Updated financial policies and procedures
- Comprehensive Rate Study
- Interim rate structure update, recommendations, and comparisons
- Miscellaneous fee and deposit analysis and recommendations
- Ordinance and Policy review and updating Assistance
- Benchmarking report
- Development services fee/process assessment and update
- Organizational structure assessment
- Dashboard visualizations and presentation materials.

4.2. Work Authorizations

For each assignment, a work authorization will be issued. The Firm will be requested to submit a proposal for each assignment, including a detailed scope of work, assigned staff, job titles, and hourly rates.

Travel: All reimbursable expenses will be estimated at the time each Work Authorization is negotiated.

All requests for payment of eligible expenses and other charges for reimbursement under the terms of the Work Authorization shall include copies of paid receipts, invoices, or other documentation acceptable to the City.

The City reserves the right to issue work authorizations for discrete tasks and does not guarantee all services will be utilized.

4.3. Service Requirements

A. The selected firm must have a proven track record of providing similar services to municipalities or utility providers.
B. The firm must assign a dedicated project manager to oversee all aspects of the project and serve as the primary point of contact for the City.
C. The firm must provide regular progress reports and updates to City staff, including detailed documentation of all findings and recommendations.
D. The firm must be available for meetings and presentations with City staff, elected officials, and other stakeholders as needed.
E. The firm must ensure that all work is completed in a timely manner and within the agreed-upon budget.

4.4. Delivery Requirements

A. The firm must submit a detailed project plan and timeline within two weeks of contract award.
B. All deliverables, including reports, presentations, and models, must be submitted in electronic and/or hard copy formats.
C. The firm must provide training and support to City staff to ensure the successful implementation of all recommendations.
D. The firm must be available for follow-up consultations and support as needed.
E. All deliverables must be submitted in accordance with the agreed-upon timeline and to the satisfaction of the City.

5. SUBMITTAL INSTRUCTIONS AND REQUIREMENTS

5.1. Minimum Requirements from Proposers

To be considered responsive, the Proposer must meet all of the following minimum requirements. Failure to demonstrate compliance with any requirement may result in the proposal being rejected as non-compliant.

- Proposer must have performed similar services for the past (5) five years of the scope and nature required by this RFP. Municipal experience preferred.
- The proposer must have sufficient staff and computer technology ability to prepare and/or update at least one enterprise rate study (e.g., water/wastewater, and/or stormwater) and one bond feasibility report annually (this does not mean that the City will assign this work, only that the Successful Proposer shall have the capability to perform the work).
- If sub-contractor service is proposed, verification of qualifications shall be submitted with the proposal.

5.2. Submission Format Requirements

Proposals must be submitted electronically through the eBid System (https://pompanobeachfl.ionwave.net) on or before the date and time stated in Section 1-Schedule of Events. Please follow all the steps and requirements to submit proposals at http://www.pompanobeachfl.ionwave.net/. Submissions must include all documents, requirements, and attachments advertised on the website, as listed in the Attributes tab and the Response Attachments tab of the eBid System.

The City will not be responsible for delays caused by technical or other issues. It is the sole responsibility of the Proposer to ensure its Proposal is successfully submitted in the eBid System before the established deadline for Proposal submission.

The City reserves the right to reject and not consider any proposals that are not submitted according to the requirements established herein.

5.3. Proposer's Responsibilities

Before submitting a response, the Proposer shall be solely responsible for conducting any necessary investigations, evaluations, and examinations to ascertain all conditions and requirements affecting the full performance of the Contract. Ignorance of such conditions and requirements, and/or failure to make such evaluations, investigations, and examinations, will not relieve the Proposer from any obligation to comply with every detail and with all provisions and requirements of the Contract and will not be accepted as a basis for any subsequent claim whatsoever for any monetary consideration on the part of the Proposer.

5.4. Costs Incurred by the Proposer in Preparation of the Proposal

Proposers are responsible for any and all costs associated with responding to this RFP. The City will not reimburse any Proposer for preparation, submittal, travel, or per diem costs. All expenses involved with the preparation and submission of Proposals, or any work performed in connection with this solicitation, shall be the sole responsibility (and shall be at the sole cost and expense) of the Proposer and shall not be reimbursed by the City.

5.5. Composition Of Project Team

The principals and personnel named in the proposal must perform the services throughout the contractual term, unless otherwise provided for by a negotiated contract or a written amendment to the same, executed by both parties. No diversion or substitution of principals or personnel will be allowed unless a written request that sets forth the qualifications and experience of the proposed replacement(s) is submitted to and approved by the City in writing. If, during the course of the project, the Successful Proposer makes personnel changes, the City has the right of review, acceptance, and/or reject proposed substitute(s). The City will make available the City's management team for interview and consultation during plan(s) development and for review of the draft and final plans.

5.6. Coordination With The City

The Successful Proposer shall identify the Project Manager to work in close coordination with the City. The City's Project Manager shall be the City's point of contact. The City shall approve any changes to the Project Manager or personnel assigned to the project.

During the term of the contract, the Project Manager shall meet on-site with the City's Project Manager and/or other designated City officials as necessary, for the purpose of discussing and coordinating work to be performed, or performance of work.

5.7. Environmental Regulations

The City reserves the right to consider the Proposer's history of citations or violations of Environmental Regulations and investigate the Proposer's responsibility. Furthermore, it reserves the right to declare the Proposer not responsible if the history of violations warrants such a determination in the City's opinion. The Proposer shall submit a complete history of all citations, violations, notices, and dispositions within the Proposal. The non-submission of any such documentation shall be deemed an affirmation by the Proposer that there are no citations or violations. The Proposer shall notify the City immediately of notice of any citation or violation, which the Proposer may receive after the RFP opening date and during the time of performance of any contract/agreement awarded to it.

6. PROPOSAL REQUIREMENTS AND EVALUATION CRITERIA

This section outlines the proposal requirements and evaluation criteria that will be used to assess and score Proposals. The maximum possible points awarded for each section are noted. Failure to respond to or provide incomplete responses to any of the evaluation criteria below will result in zero or reduced points for the criterion and may lead to the disqualification of the entire proposal. In addition, to maintain comparability and facilitate and expedite the review process, it is strongly recommended that the proposals be organized as specified below:

6.1. Proposer's Format:

6.1.1. Title page:

- Show the project name and solicitation number, the name of the Proposer's firm, business address, telephone number, name, title, email address, and phone number of the primary contact person, and the date.

6.1.2. Table of Contents:

- Include a clearly organized table of contents identifying sections and corresponding page numbers.

6.1.3. Letter of Interest:

Submit a letter of Interest, signed by an authorized representative of the Proposer's firm, expressing the Proposer's commitment to provide the services described herein. In the letter, include:

- Legal name of the Proposer and any joint venture partners (if applicable)
- Federal Tax Identification Number
- Office address
- Primary Contact name, title, phone number, and email

6.1.4. Company Profile

Provide a comprehensive overview of the Proposer, including:

- Company's history and years in operation
- Legal structure (e.g., sole proprietorship, partnership, LLC) and ownership details
- Description of core services related to utilities financial consulting.
- Organizational structure and key personnel
    - Include resumes for key personnel proposed for this contract, highlighting relevant experience within the past five (5) years.
    - The Proposer must commit that the principals and personnel named in the response will perform the services throughout the Agreement term unless otherwise provided for by way of a negotiated Agreement/written amendment to the same executed by both parties. No diversion or substitution of principals or personnel will be allowed unless a written request that sets forth the qualifications and experience of the proposed replacement(s) is submitted to and approved by the City in writing.

6.1.5. Conflicts of Interest:

Provide the name(s) of any officer, director, agent, or immediate family member (spouse, parent, sibling, and child) who is also an employee, elected or appointed official of the City of Pompano Beach. Further, the Proposer must disclose the name of any City employee, elected or appointed official who owns, either directly or indirectly, an interest of ten (10%) percent or more in the Proposer entity or any of its affiliates.

6.1.6. Litigation:

Disclose any litigation within the past five (5) years of the firm's/team member's performance, including status/outcome. If there is no litigation, the Proposer must include a letter that no litigation exists within the past (5) years.

6.1.7. Office Locations:

The Proposer shall identify the office location(s) from which the services under this Agreement will be performed. At a minimum, the Proposer must specify the primary office location of the assigned Project Manager and all key personnel proposed for this project.

For each identified office location, include the physical address and indicate which team members will be based at that location. If personnel are working remotely or from multiple offices, clearly describe those arrangements.

The City reserves the right to consider the location of key personnel and the Proposer's ability to provide timely on-site support, coordination, and responsiveness as part of its evaluation.

6.2. Experience and Qualifications (Maximum 30 Points):

Proposers shall demonstrate their qualifications and experience performing services similar in scope, scale, and complexity to those required under this solicitation. Emphasis will be placed on experience with municipal utility systems of comparable size and operational complexity, including Water, Wastewater, Reuse, and Stormwater utilities.

Proposers shall clearly describe their experience and capabilities in the following areas:

- Revenue sufficiency studies, cost-of-service analyses, and rate design
- Utility billing and consumption data analysis
- Financial modeling, forecasting, and long-term financial planning
- Development and implementation of tariffs, surcharges, and rate stabilization strategies
- Developer services assessment and implementation
- Experience working with large users and wholesale customers, including evaluation and negotiation of service agreements
- Support for the issuance of revenue bonds or other debt financing mechanisms for capital or major operational programs
- Development and implementation of low-income and equity-based assistance programs
- Organizational assessments and implementation strategies for municipal utilities

Experience in Florida or comparable regulatory environments is preferred.

Proposers should provide descriptions of relevant projects and engagements that demonstrate their ability to successfully perform the required services. Project descriptions should highlight the Proposer's role, scope of work performed, and key outcomes or results achieved.

The Evaluation Committee will assess the Proposer's overall experience, depth of expertise, and demonstrated ability to perform the required services based on the information provided.

6.3. Project Approach and Methodology (Maximum 25 Points):

Understanding of the City's objectives, unique challenges, and desired outcomes. The proposed approach should include:

- Methodology for financial modeling, rate design, rate stabilization, scenario analysis, and policy development, including proposed tools, data analysis techniques, and approach to developing customized solutions.
- Knowledge of current industry trends, demand for innovative programs, and advanced ratemaking mechanisms.
- Ability to communicate effectively, engage internal and external stakeholders, and collaborate with City staff and others as needed.
- Proposed project management approach, including the timeline, deliverables, and communication plan.

Clarity, innovation, and the methodology's practicality will be considered.

6.4. Project Team and Key Personnel (Maximum 15 Points):

Qualifications, experience, and availability of key personnel assigned to the project. Includes:

- Identification of key team members, including subcontractors, with expertise in utility financial modeling, rate design, regulatory policies, tariffs, surcharges, and organizational analysis.
- Resumes of key personnel demonstrating knowledge, skills, and professional licenses and or certifications applicable to the services.
- Current and anticipated workload of key personnel

6.5. Relevant Project Experience/References (Maximum 15 Points):

Proposers shall demonstrate successful completion of projects similar in scope, scale, and complexity to the services required under this solicitation.

Submittals shall include:

- References from a minimum of three (3) municipal clients within the past five (5) years
- Emphasis on projects involving multi-utility systems, including Water, Wastewater, Reuse, and Stormwater services
- Description of each referenced project, including scope of services performed and outcomes achieved

Letters of commendation or recommendation may be included as supplemental documentation.

The Evaluation Committee will evaluate the relevance, complexity, and demonstrated success of the Proposer's past projects, with particular emphasis on experience with municipal and multi-utility systems.

6.6. Fees (Maximum 10 Points):

Fee structure must be reasonable, transparent, and competitive:

- Provide the hourly rate for all job titles, for the firm and the subcontractor.
- Include any other fees or charges that may apply, including administrative charges, etc.

Rate Sheet to be included in Exhibit B

6.7. Local Business Program (Maximum 5 points)

The Procurement and Contracts staff will evaluate this section. On March 13, 2018, the City Commission approved Ordinance 2018-46, establishing a Local Business Program, a policy to increase the participation of City businesses in the City's procurement process.

For purposes of this solicitation, "Local Business" will be defined as follows:

TIER 1 LOCAL VENDOR.

POMPANO BEACH BUSINESS EMPLOYING POMPANO BEACH RESIDENTS. A business entity that has maintained a permanent place of business within the city limits and maintains a staffing level, within this local office, of at least ten percent who are residents of the City, or includes subcontracting commitments to Local Vendors Subcontractors for at least ten percent of the contract value. The permanent place of business may not be a post office box. The business must be located in a non-residential zone and must actually distribute goods or services from that location. The business must be staffed with full-time employees within the limits of the city. In addition, the business must have a current business tax receipt from the City for a minimum of one year prior to the date of issuance of a solicitation.

TIER 2 LOCAL VENDOR.

BROWARD COUNTY BUSINESS EMPLOYING POMPANO BEACH RESIDENTS OR UTILIZING LOCAL VENDOR SUBCONTRACTORS. A business entity, which has maintained a permanent place of business within Broward County and maintains a staffing level, within this local office, of at least 15% who are residents of the City, or includes subcontracting commitments to Local Vendors Subcontractors for at least 20% of the contract value. The permanent place of business may not be a post office box. The business must be located in a non-residential zone and must actually distribute goods or services from that location. The business must be staffed with full-time employees within the limits of the city. In addition, the business must have a current business tax receipt from the respective Broward County municipality for a minimum of one year prior to the date of issuance of a solicitation.

LOCAL VENDOR SUBCONTRACTOR.

POMPANO BEACH BUSINESS. A business entity that has maintained a permanent place of business within the city limits of the City. The permanent place of business may not be a post office box. The business must be located in a non-residential zone and must actually distribute goods or services from that location. The

business must be staffed with full-time employees within the limits of the city. In addition, the business must have a current business tax receipt from the City for a minimum of one year prior to the date of issuance of a solicitation.

You can view the list of City businesses with a current Business Tax Receipt on the City's website and locate local companies that are available to perform the work required by the RFP scope of services. The business information, sorted by business use classification, is posted on the Business Tax Receipt Division webpage: www.pompanobeachfl.gov by selecting the Pompano Beach Business Directory in the Shop Pompano! Section.

The City is **strongly committed** to ensuring the participation of City Businesses as contractors and subcontractors for procuring goods and services, including labor, materials, and equipment.

Proposers are required to participate in the City's Local Business Program by including, as part of their package, the Local Business Participation Form (Exhibit A), listing the local businesses that will be used on the contract, and the Letter of Intent Form (Exhibit B) from each local business that will participate in the contract.

If a Prime Contractor/Vendor is not able to achieve the level of goal attainment of the contract, the Prime Vendor will be requested to demonstrate and document that good faith efforts were made to achieve the goal by providing the Local Business Unavailability Form (Exhibit C), listing companies that were contacted but not available, and the Good Faith Effort Report (Exhibit D), describing the efforts made to include local business participation in the contract. This documentation shall be provided to the City Commission for acceptance.

The awarded Proposer will be required to submit "Local Business Subcontractor Utilization Reports" during projects and after projects have been completed. The reports will be submitted to the assigned City project manager. The Local Business Subcontractor Utilization Report template and instructions have been included in the bid document.

Failure to meet Local Vendor Goal commitments will result in an "unsatisfactory" compliance rating. Unsatisfactory ratings may impact the award of future projects if a sanction is imposed by the City Commission.

The City shall award a Local Vendor preference based upon vendors, contractors, or subcontractors who are local, with a preference as follows:

For evaluation purposes, the Tier 1 and Tier 2 businesses shall be a criterion for award in this Solicitation. No business may qualify for more than one tier level.

For evaluation purposes, local vendors shall receive the following preferences:

Tier 1 business, as defined by this subsection, shall be granted a preference in the amount of 5 Points.
Tier 2 business, as defined by this subsection, shall be granted a preference in the amount of 2.5 Points.

It is the responsibility of the awarded vendor/contractor to comply with all Tier 1 and Tier 2 guidelines. The awarded vendor/contractor must ensure all requirements are met before contract execution.

PROPOSERS APPLYING FOR TIER 1 STATUS, OR THOSE LISTING LOCAL SUBCONTRACTORS OR SUBCONSULTANTS IN EXHIBIT A, MUST PROVIDE A VALID CITY OF POMPANO BEACH BUSINESS TAX RECEIPT FOR THE PROPOSER AND FOR EACH LOCAL SUBCONTRACTOR OR SUBCONSULTANT IDENTIFIED. FAILURE TO INCLUDE THE REQUIRED BUSINESS TAX RECEIPT(S) WILL RESULT IN THE DISQUALIFICATION OF THE SUBCONTRACTOR OR SUBCONSULTANT FROM THE LOCAL BUSINESS PROGRAM (SECTION 6.5) AND THE LOSS OF ALL ASSOCIATED POINTS.

IF A PROPOSER IS NOT CLAIMING PARTICIPATION IN ANY LOCAL BUSINESS PROGRAM TIER, THE REQUIRED FORMS (EXHIBITS A THROUGH D, AS APPLICABLE) MUST STILL BE SUBMITTED AND CLEARLY MARKED "NOT APPLICABLE" THROUGHOUT. PROPOSALS SUBMITTED WITHOUT THE REQUIRED DOCUMENTATION WILL BE DEEMED NON-RESPONSIVE AND INELIGIBLE FOR AWARD.

6.8. Other Required Documentation

The following documents are required to determine whether the Proposal meets the minimum requirements. However, these documents will not be considered when scoring the proposal.

6.8.1. City Forms:

Responses should include all pages of this solicitation, initialed where indicated, and completed Local Business forms. These forms are included in this RFP and available as attachments to the eBid System. These forms must be completed electronically in the Attributes tab or uploaded to the Response Attachments tab of the eBid System.

6.8.2. Insurance

Please see Exhibit B with the Insurance Requirements in the Attachments tab of the eBid System.

7. EVALUATION AND AWARD

7.1. Minimum Eligibility Requirements

All proposals received must meet the minimum eligibility requirements as required in Section 6 and be confirmed at the time of submission to be considered for further evaluation. Failure to meet the Minimum Eligibility Requirements may disqualify the entire proposal and prevent it from being considered for further evaluation.

The City reserves the right to seek any information or documentation from the Proposer or other source(s) as the City determines is necessary. Failure to submit any additional information in accordance with the City's request shall result in a Proposal being deemed non-compliant by the City of Pompano Beach. The City reserves the right to determine whether any omission, deficiency, or deviation is material or minor and whether waiver is in the best interest of the City.

7.2. Evaluation Committee

Only Proposals determined by the Procurement and Contracts Department to be compliant with the submission requirements and Minimum Eligibility Requirements of this RFP will be forwarded to the Evaluation Committee for evaluation.

The City Manager will approve a selection evaluation committee to assist in evaluating the received Proposal(s) and selecting the most qualified company or firm. The Committee's findings will be presented to the City Commission. Based upon the evaluation, the Evaluation Committee will recommend one or more Proposers to the City Commissioners for the award and execution of a Service Agreement.

7.3. Evaluation Process - Presentations

The Procurement and Contracts Department staff will initiate an administrative review of the Proposals to determine compliance with the submission requirements and Minimum Eligibility Requirements set forth in this RFP. All Proposals determined to be compliant and eligible for evaluation will be provided to the Evaluation Committee. The Evaluation Committee will score the proposals based on the following:

SECTION NUMBER AND DESCRIPTION		MAXIMUM POINTS
6.2	Experience and Qualifications	30
6.3	Project Approach and Methodology	25
6.4	Project Team and Key Personnel	15
6.5	Relevant Project Experience / References	15
6.6	Fees	10
6.7	Local Business Program	5

The Evaluation Committee reserves the right to shortlist the proposals received and/or to request oral presentations from the Proposers. If the Evaluation Committee requests presentations, they will be scheduled at a later date. Each invited Proposer will be provided with up to 20 minutes to present to the Evaluation Committee members, followed by a question-and-answer period. Pursuant to Section 286.0113(2)(b)1., Florida Statutes, the portion of an Evaluation Committee meeting at which a Proposer makes an oral presentation as part of this competitive solicitation may be conducted as an exempt session, limited solely to the presentation and questions directed to the presenting Proposer.

The Evaluation Committee shall rank the Proposers based on the criteria stated within this solicitation, the information provided in the proposal, and the presentations. After all members of the Evaluation Committee have provided their scores for all Proposals, the scores will be calculated and combined, and the sum of qualitative scores will be converted into rankings. After scoring (and presentations, if any), the Committee determines final rankings and recommends an award to one or more proposers. Based upon the final rankings, the Evaluation Committee may recommend that negotiations be conducted with one or more Proposers in ranked order, as determined to be in the best interest of the City. If contract negotiations cannot be completed with the highest-ranked team, then negotiations may proceed to other ranked teams in accordance with applicable Florida law and City procurement procedures.

7.4. Tie Breaker:

In case there is a tie for the highest-ranked Proposers, the recommendations shall be made by giving preference to the following items in this order:

1) Maintenance of a Drug-Free Workplace in accordance with the requirements of 287.087, F.S.
2) Local Business Program Participation
3) Closest Proximity/Location to the Project site
4) Coin Toss

7.5. Technicalities:

Failure to respond, provide detailed information, or provide requested proposal elements may result in reduced points in the evaluation process or a determination that the Proposal is non-compliant, and may be deemed a technicality or a material deviation, depending on the nature and extent of the omission.

The Procurement and Contracts Department shall conduct an administrative review of all Proposals to determine compliance with the submission requirements and Minimum Eligibility Requirements of this RFP. Proposals determined by the Procurement and Contracts Department to be non-compliant may be rejected and shall not be forwarded to the Evaluation Committee for scoring or ranking. If more than one Proposal is determined to be compliant, the Procurement and Contracts Department shall present any identified omissions, deficiencies, irregularities, or technical deviations to the Evaluation Committee.

The Evaluation Committee shall consider and rely upon the compliance determinations made by the Procurement and Contracts Department and may recommend rejection of any Proposal containing a material deviation from the requirements of this RFP or may recommend waiver of minor irregularities or technicalities when determined to be in the best interest of the City. The City reserves the right to determine whether any omission, deficiency, or deviation is material or minor and whether waiver is in the best interest of the City.

If only one (1) compliant Proposal is received, or if only one (1) compliant Proposal remains after the administrative review, the City may proceed without scoring the Proposal and may negotiate the best terms and conditions with the sole Proposer, or may reject, cancel, or reissue the solicitation, as determined to be in the best interest of the City. The negotiation of a sole compliant Proposal under this subsection is an administrative action and may occur independently of the Evaluation Committee process.

7.6. Committee Questions:

The Committee reserves the right to ask clarifying questions once proposals have been opened, to require presentations from all Proposers, to interview any or all Proposers who respond to the RFP, or to make its recommendations based solely on the information contained in the submitted proposals. The Committee has the option to use the above criteria for the initial ranking to short-list Proposers and to use an ordinal ranking system to score short-listed Proposers following presentations (if deemed necessary), with a score of “1” assigned to the short-listed Proposer deemed most qualified by the Committee.

Each company/firm should submit documentation that evidences the company’s/firm’s capability to provide the services required for the Committee’s review for shortlisting purposes. After an initial review of the proposals, the City may invite selected proposals for an interview to discuss the proposal and meet with the company’s or firm’s representatives, particularly key personnel assigned to the project. Should interviews be deemed necessary, it is understood that the City shall incur no costs as a result of this interview nor bear any obligation in further consideration of the submittal.

7.7. Committee’s Recommendations:

After completion of scoring and, if applicable, presentations, the Evaluation Committee shall determine the final rankings of the Proposers. The Committee may utilize rescoring based on the published evaluation criteria or may apply an ordinal ranking methodology following presentations, as determined by the Committee.

Based upon the final rankings, the Evaluation Committee may, in its discretion, recommend an award to one (1) Proposer, or may recommend that negotiations be conducted with more than one (1) Proposer in ranked order, when determined to be in the best interest of the City. If the Committee recommends negotiations with more

than one Proposer, negotiations shall proceed in ranked order. The Committee may recommend proceeding to the next highest-ranked Proposer if negotiations with a higher-ranked Proposer are unsuccessful or an impasse is reached.

Pursuant to Section 286.0113(2), Florida Statutes, the Evaluation Committee may conduct exempt negotiation sessions with ranked Proposers prior to making its recommendation for award. Any such exempt negotiation sessions shall be conducted outside the presence of the public and other Proposers. The Committee shall recess the open public portion of the meeting to conduct any exempt negotiation session(s) and shall reconvene the open public portion of the meeting upon completion.

Upon completion of its evaluation and any exempt negotiation sessions, the Evaluation Committee shall, by motion and roll call vote, make its recommendation to the City Commission. City staff may assist in documenting and presenting the Committee's recommendation to the City Commission. Final scores and rankings are used solely to establish the negotiation order and do not determine the actual award.

The negotiation of a sole compliant Proposal is an administrative action and may occur independently of the Evaluation Committee process, as determined by the City. In all cases, City staff assigned to the project and procurement retain authority to negotiate the terms and conditions of any resulting agreement, subject to final approval by the City Commission.

7.8. Negotiations:

Following the Evaluation Committee Meeting, the City reserves the right to enter into negotiations with the successful Proposer. Notwithstanding the preceding, the City is in no way obligated to enter into a Contract with any successful Proposer and may cease negotiations at any time. The Proposer also understands and acknowledges that no property, Contract, or legal rights of any kind shall be created at any time until and unless an Agreement has been agreed to, approved by the City Commission or by the City Manager if within his delegated authority, and executed by the parties. During the negotiation process, the City reserves the right to request a best and final offer from the Proposer with whom it is negotiating.

7.9. Determination of Award:

The City Commission shall consider the Committee's award recommendation for this RFP and may approve such a recommendation. The City Commission may also, at its option, reject the Evaluation Committee's recommendation, or it may also reject all Proposals, in which case the City may choose to re-advertise this project "as is" or by adopting a modified version.

8. STANDARD PROVISIONS

8.1. RFP Conditions and Provisions

The proposal must be submitted to the City on or before the time and date stated herein. All Proposers, by submission of a proposal, shall agree to comply with all of the conditions, requirements, and instructions of this RFP as stated or implied herein. All proposals and supporting materials submitted will become the property of the City. Exceptions or deviations to this solicitation may not be added after the submittal date. All Proposers are required to provide all information requested in this RFP. Failure to do so may result in the proposal's disqualification.

The City reserves the right to postpone or cancel this RFP or reject all proposals if, in its sole discretion, it deems it in the City's best interest to do so. The City reserves the right to waive any technical or formal errors or omissions, reject all proposals, or award a contract for the items herein, in part or whole, if it is determined to be in the City's best interests.

The City shall not be liable for any costs incurred by the Proposer in preparing proposals or for any work performed therein.

8.2. Acceptance Period

Proposals submitted in response to this RFP must be valid for a period of no less than one hundred eighty (180) days from the closing date of this solicitation.

8.3. Withdrawal Of Proposals

A firm may withdraw its proposal without prejudice, no later than the advertised deadline for submission of proposals by using the eBid System or through written communication to the Procurement and Contracts Department, 1190 N.E. 3rd Avenue, Building C, Pompano Beach, Florida 33060.

8.4. Protest Procedures

The Protest Procedures established within the Procurement and Contracts Procedures Manual and Section 120.57, Florida Statutes, must be followed to file a valid Protest to this solicitation. To be considered, protests concerning the proposed solicitation award must be filed in writing with the Procurement and Contracts Director. They may only be filed by bidders or Proposers whom the solicitation or award may aggrieve. The initial protest must be addressed to the following:

Director of Procurement and Contracts, City of Pompano Beach
1190 N.E. 3rd Avenue, Building C, Pompano Beach, Florida 33060

8.5. Familiarity With Laws

It is assumed the selected firm(s) will be familiar with all federal, state, and local laws, ordinances, rules, standards, and regulations that may affect its services pursuant to this RFP. Ignorance on the part of the firm will in no way relieve the firm from responsibility for compliance.

8.6. Staff Assignment

The City of Pompano Beach reserves the right to approve or reject, for any reason, the Proposer's staff assigned to this project at any time. Background checks may be required at the discretion of the City.

8.7. Contract Terms

The contract shall include, at a minimum, this RFP document and the successful Proposer's proposal. The City of Pompano Beach City Attorney shall prepare the contract. If the City of Pompano Beach defends any claim, demand, cause of action, or lawsuit arising out of any act, action, negligent acts or negligent omissions, or willful

misconduct of the contractor, its employees, agents, or servants during the performance of the contract, whether directly or indirectly, the contractor agrees to reimburse the City of Pompano Beach for all expenses, attorney's fees, and court costs incurred in defending such claim, cause of action or lawsuit.

8.8. Waiver

It is agreed that no waiver or modification of the contract resulting from this RFP, or of any covenant, condition, or limitation contained in it shall be valid unless it is in writing and duly executed by the party to be charged with it, and that no evidence of any waiver or modification shall be offered or received in evidence in any proceeding, arbitration, or litigation between the parties arising out of or affecting this contract, or the right or obligations of any party under it, unless such waiver or modification is in writing, duly executed as above. The parties agree that the provisions of this paragraph may not be waived except by a duly executed writing.

8.9. Manner of Performance

The Proposer agrees to perform its duties and obligations under the contract resulting from this RFP in a professional manner and in accordance with all applicable local, federal, and state laws, rules, and regulations. Proposer agrees that the services provided under the contract resulting from this RFP shall be provided by employees who are educated, trained, experienced, certified, and licensed in all areas encompassed within their designated duties. Proposer agrees to furnish the City of Pompano Beach with all documentation, certification, authorization, license, permit, or registration currently required by applicable laws, rules, and regulations. Proposer further certifies that it and its employees are now in and will maintain good standing with such governmental agencies and that it and its employees will keep all licenses, permits, registrations, authorizations, or certifications required by applicable laws or regulations in full force and effect during the term of this contract. Failure of the Proposer to comply with this paragraph shall constitute a material breach of contract.

8.10. Quality

All materials and supplies used to construct the services within this RFP shall be new unless otherwise specified. The items must be new, of the latest model, of the highest quality, and with the highest-grade workmanship. Reconditioned, refurbished, rebuilt, discontinued, used, shopworn, demonstrator, prototype, or other types of product(s) of this kind are unacceptable without written correspondence from the City with the City Manager's approval**.**

8.11. Omissions

Omissions in the specifications of the RFP, Attachments, Exhibits, or any Addendum regarding any details or the omission from the specification of a detailed description concerning any point shall be interpreted as meaning that only the best available units or service shall be provided. The best commercial practices are to prevail, and only materials and workmanship of first quality are to be used to submit this proposal.

8.12. Hold Harmless and Indemnification

Proposer covenants and agrees that it will indemnify and hold harmless the City and all of its officers, agents, and employees from any claim, loss, damage, cost, charge, or expense arising out of any act, action, neglect, or omission by the Proposer, whether direct or indirect, or whether to any person or property to which the City or said parties may be subject, except that neither the Proposer nor any of its subcontractors will be liable under this section for damages arising out of injury or damage to persons or property directly caused by or resulting from the sole negligence of the City or any of its officers, agents or employees.

8.13. Composition Of the Project Team

The principals and personnel named in the proposal must perform the services throughout the contractual term unless otherwise provided for by way of a negotiated contract or written amendment to the same executed by both parties. No diversion or substitution of principals or personnel will be allowed unless a written request that sets forth the qualifications and experience of the proposed replacement(s) is submitted to and approved by the City in writing.

8.14. Survivorship Rights

This contract resulting from this RFP shall be binding on and inure to the benefit of the respective parties and their executors, administrators, heirs, personal representatives, successors, and assigns.

8.15. Termination

The City of Pompano Beach may terminate the contract resulting from this RFP without cause upon providing the contractor with at least sixty (60) days' prior written notice. Should either party fail to perform any of its obligations under the contract resulting from this RFP for a period of thirty (30) days after receipt of written notice of such failure, the non-defaulting party will have the right to terminate the contract immediately upon delivery of written notice to the defaulting party of its election to do so. The foregoing rights of termination are in addition to any other rights and remedies such party may have.

8.16. Governing Law

Any agreement resulting from this RFP shall be governed by the laws of the State of Florida, and the venue for any legal action relating to such agreement will be the 17th Judicial Circuit Court of Broward County, Florida.

8.17. Relationship to the City

It is the intent of the City, and the Proposer hereby acknowledges and agrees that the successful Proposer is considered to be an independent Contractor and that neither the Proposer nor the Proposer's employees, agents, or Contractors shall, under any circumstances, be considered employees or agents of the City.

8.18. Cone of Silence

Cone of Silence shall take effect once this solicitation is released to the General Public and shall remain in effect until the City Commission has taken final action to approve or reject an award, or otherwise terminate the solicitation. During the Cone of Silence period, Respondents to this solicitation, or persons acting on their behalf, including lobbyists, shall not communicate, directly or indirectly, regarding any aspect of this solicitation with any member of the City Commission, the City Clerk, the City Manager's Office, any Evaluation Committee member, or any other City of Pompano Beach employee, except in writing to the Procurement and Contracts Department staff as expressly permitted in this solicitation. Violation of the Cone of Silence may be grounds for rejection of a Proposal or other appropriate action as permitted by City ordinance.

8.19. Communications

No negotiations, decisions, or actions shall be initiated or executed by the Proposers as a result of any discussions with any City employee. Only those communications in writing from the City may be considered duly authorized expressions on behalf of the City. In addition, only communications from Proposers that are signed and in writing will be recognized by the City as duly authorized expressions on behalf of Proposers.

8.20. Conflict Of Interest

To determine any possible conflict of interest, each Proposer must disclose if any City employee is also an owner, corporate officer, or employee of the firm. If any City employee is an owner, corporate officer, or employee, the Proposer must file a statement with the Broward County Supervisor of Elections pursuant to § 112.313, Florida Statutes.

8.21. Lobbying

No Lobbying Permitted: As to any matter relating to this solicitation, the Proposer, project team member, or anyone representing the Proposer is advised they are prohibited from contacting or lobbying the Mayor, any City Commissioner, City employees, agents, or any other person working on behalf of the City related to or involved with this solicitation, including all members of the City and CRA advisory committees. For purposes of

clarification, a team's representatives shall include, but not be limited to, the Proposer's employees, partners, attorneys, officers, directors, consultants, lobbyists, or any actual or potential subcontractor or consultant of the Proposer and the Proposer's team. All questions regarding the solicitation are to be submitted using the Questions feature in the eBid System. Any violation of this condition may result in rejection and disqualification of the response/Proposal. **This "No Lobbying Provision" is in effect from the date of publication of the solicitation and shall terminate when the City approves the execution of a Contract with an awarded Proposer, rejects all responses, or otherwise takes action, which ends the solicitation process.**

The Proposer shall disclose any commitment, direct or indirect, financial or otherwise, made to any person, entity, institution, or association (Recipient), other than a team member identified as required by the solicitation submittal requirements, in connection with or potentially in connection with this solicitation. Because of the City's commitment to complete transparency regarding this solicitation, the Disclosure Form shall be required to be updated to include additional Recipients, if any, up to and including the date of approval by the City Commission of the final negotiated Agreement. Additionally, all such Recipients shall be required to register as lobbyists as required by Sec. 34.402 of the City's Code.

8.22. Right to Inspect or Audit

Contractor's records which shall include but not be limited to accounting records, written policies, procedures, computer records, disks and software, videos, photographs, subcontract files (including Proposals of Successful and Unsuccessful Proposers, originals, estimates, estimating worksheets, correspondence, change order files (including documentation covering negotiated settlements), and any other supporting evidence necessary to substantiate charges related to the agreement/contract (all the foregoing hereinafter referred to as "records") shall be open to inspection and subject to audit and reproduction, during normal working hours, by City's agent or its authorized representative to the extent necessary to adequately permit evaluation and verification of any invoices, payments or claims submitted by the Contractor or any of its payees pursuant to the execution of the agreement/contract. Such records subject to the examination shall also include, but are not limited to, those necessary to evaluate and verify direct and indirect costs (including overhead allocations) as they may apply to costs associated with the agreement/contract.

For the purpose of such audits, inspections, examinations, and evaluations, the City's agent or authorized representative shall have access to said records from the effective date of the agreement/contract, for the duration of the Work, and until five (5) years after the date of final payment by the City to the Contractor pursuant to the agreement/contract. The City's agent or authorized representative shall have access to the Contractor's facilities, all necessary records, and adequate and appropriate workspace to conduct audits in compliance with this article. The City's agent or its authorized representative shall give auditees reasonable advance notice of intended audits.

The Contractor shall require all subcontractors, insurance agents, and material suppliers (payees) to comply with this article's provisions by inserting the requirements hereof in any written agreement/contract. Failure to obtain such written agreements/contracts that include such provisions shall be a reason to exclude some or all of the related payees' costs from amounts payable to the Contractor pursuant to the agreement/contract.

8.23. No Discrimination

There shall be no discrimination as to race, sex, color, age, religion, or national origin in the operations conducted under any contract with the City.

8.24. Drug-Free Workplace

The selected firm(s) must verify that they will operate a "Drug-Free Workplace" as outlined in Florida Statute 287.087.

8.25. Public Entity Crimes

A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity

crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals 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 Statute, Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

8.26. Patent Fees, Royalties, And Licenses

If the selected Proposer requires or desires to use any design, trademark, device, material, or process covered by letters of patent or copyright. In that case, the selected Proposer and his surety shall indemnify and hold harmless the City from any and all claims for infringement because of the use of any such patented design, device, trademark, copyright, material, or process in connection with the work agreed to be performed and shall indemnify the City from any cost, expense, royalty or damage which the City may be obligated to pay because of any infringement at any time during or after completion of the work.

8.27. Price Adjustments

Prices offered shall remain firm throughout the Agreement. A request for a price adjustment, with proper documentation justifying the adjustment, may be submitted in writing thirty (30) calendar days before the first-anniversary date of the Agreement. Price adjustment requests shall be evaluated on an annual basis after that. Unit price adjustments must have written approval from the City before invoicing. Any unit price adjustment invoiced without written consent from the City shall not be paid, and the invoice will be returned to the Awardee for correction.

The Director, Procurement and Contracts, may, in the Director's sole discretion, on behalf of the City, equitably adjust pricing if the pricing or availability of supplies is adversely affected by extreme and unforeseen volatility in the marketplace. Consideration for any pricing adjustment shall require the vendor to provide irrefutable evidence that **ALL** the following circumstances exist:

i. The volatility is due to causes wholly beyond the vendor's control and
ii. The volatility affects the marketplace or industry, not just the vendor's source of supply; and
iii. The effect on pricing or availability of supply is substantial, and
iv. The volatility so affects the vendor that continued performance of the Agreement would result in a substantial loss.

Note: The Director of Procurement and Contracts must confirm any pricing adjustment in writing.

PRICE REDUCTIONS: Awarded vendors may offer to the City, at any time during the Agreement period, additional discounts from the prices offered in this Solicitation and invoice less than the prices offered in their submitted bid. If, from the date of bid opening, the Awardee either bids the same products at a lower price than offered to the City or reduces the price of the bidding product to another entity, the lowest of these reduced prices shall be extended to the City.

8.28. Invoicing/Payment

All invoices should be sent to the City of Pompano Beach, Accounts Payable, P.O. Drawer 1300, Pompano Beach, Florida, 33061. In accordance with Florida Statutes, Chapter 26, payment will be made within 45 days after receipt of a proper invoice.

8.29. Taxes

The City of Pompano Beach, Florida, does not pay Federal Excise or State taxes on purchases of tangible personal property. The sales tax exemption number is available upon request. This exemption does not apply to purchases of tangible property made by contractors who use tangible personal property in the performance of contracts for the improvement of real property owned by the City of Pompano Beach.

8.30. Force Majeure

Neither party shall be obligated to perform any duty, requirement, or obligation under this RFP if the City has determined that such performance is prevented by fire, hurricane, earthquake, explosion, war, sabotage, accident, flood, acts of God, strikes, or other labor disputes, riot or civil commotions, epidemics, pandemics, government regulations, and the issuance or extension of existing government orders of the United States, the State of Florida, or local county and municipal governing bodies, or because of any other matter or condition beyond the control of either party and which cannot be overcome by reasonable diligence and without unusual expense ("Force Majeure"). In no event shall lack of funds on the part of either party be deemed Force Majeure.

8.31. Public Records

The City is a public agency subject to Section 119, Florida Statutes. The Contractor shall comply with Florida's Public Records Law, as amended. Specifically, the Contractor shall:

a. Keep and maintain public records required by the City in order to perform the service;
b. Upon request from the City's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Section 119, Florida Statutes, or as otherwise provided by law;
c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the agreement/contract term and following completion of the agreement/contract if the Contractor does not transfer the records to the City; and
d. Upon completion of the agreement/contract, transfer, at no cost to the City, all public records in possession of the Contractor, or keep and maintain public records required by the City to perform the service. If the Contractor transfers all public records to the City upon completion of the agreement/contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the agreement/contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the City upon request from the City's custodian of public records in a format compatible with the City's information technology systems.

Failure of the Contractor to provide the above-described public records to the City within a reasonable time may subject the Contractor to penalties under Section 119.10, Florida Statutes, as amended.

8.32. Public Records Custodian:

If the awarded Proposer has questions regarding the application of Chapter 119, Florida Statutes, to the awarded Proposer's duty to provide public records relating to the agreement/contract, contact the custodian of public records at:

CITY CLERK
100 W. Atlantic Blvd., Suite 253,
Pompano Beach, Florida 33060
(954) 786-4611
RecordsCustodian@copbfl.com

9. ADDENDA

The issuance of a written addendum or posting of an answer in response to a question submitted using the Questions feature in the eBid System is the only official method by which interpretation, clarification, or additional information can be provided. If any addenda are issued for this solicitation, they will be posted via the eBid System. The Proposer must obtain all Addendum/Addenda posted for this RFP in the eBid System before submitting a response to this RFP.

10. ATTACHMENTS AND EXHIBITS

10.1. Appendix - City Forms

Cost ProposalBid
T1_T2_Form
Local Business Program Forms
Insurance Requirements

City of Pompano Beach
Procurement and Contracts Department
1010 N.E. 3rd Avenue
Pompano Beach, Florida, 33060

May 18, 2026

ADDENDUM #1

RFP26-040 Utilities Rate, Financial Planning, and Organizational Services

To Whom It May Concern,

Addendum #1 has been issued and posted on the City's eBid System.

Proposers are reminded to acknowledge receipt of this Addendum by completing the Addendum Attribute in the Attributes tab within the eBid System.

The City is issuing this Addendum to extend the bid due date to 2 P.M. Thursday, May 21st, 2026.

Proposers are responsible for reviewing all newly posted documents and incorporating this information into their proposals as applicable.

The remainder of the solicitation is unchanged at this time.

Sincerely,

Michael Lee,
Purchasing Supervisor

cc: website

Exhibit B – Cover Page

Bidders Response

Local Business Forms

Proposal

Sunbiz

RFP26-040 Addendum 1
Stantec Consulting Services Inc.
Stantec
Supplier Response

Event Information

Number:	RFP26-040 Addendum 1
Title:	Utilities Rate, Financial Planning, and Organizational Services
Type:	Request for Proposals
Issue Date:	4/23/2026
Deadline:	5/21/2026 02:00 PM (ET)
Notes:	The City of Pompano Beach (the “City”) is interested in receiving proposals in response to the attached RFP for Utilities Rate, Financial Planning, and Organizational Services. Proposers must be registered on the City’s eBid System to view the solicitation documents and respond to this solicitation. The complete solicitation document can be downloaded free of charge from the eBid System at https://pompanobeachfl.ionwave.net/. Proposals must bear the electronic signature of an authorized officer of the Proposer who is legally authorized to enter into a contractual relationship in the Proposer's name. THE CITY will consider the submittal of a proposal as constituting an offer by the Proposer to perform the required services at the prices stated herein. The City is not responsible for the accuracy or completeness of any documentation the Proposer receives from any source other than the eBid System. The Proposer is solely responsible for downloading all required documents. Responses will be electronically unsealed in a public forum and read aloud.

Proposals must be submitted electronically at (https://pompanobeachfl.ionwave.net), referred to hereinafter as the eBid System, on or before the date and time stated in Section 2 — Schedule of Events. Proposals received after 2:00:00 p.m. ET on the due date will not be considered, and late bids will not be accepted.

Cone of Silence shall take effect once this solicitation is released to the General Public and shall remain in effect until the City Commission has taken final action to approve or reject an award, or otherwise terminate the solicitation. During the Cone of Silence period, Respondents to this solicitation, or persons acting on their behalf, including lobbyists, shall not communicate, directly or indirectly, regarding any aspect of this solicitation with any member of the City Commission, the City Clerk, the City Manager's Office, any Evaluation Committee member, or any other City of Pompano Beach employee, except in writing to the Procurement and Contracts Department staff as expressly permitted in this solicitation. Violation of the Cone of Silence may be grounds for rejection of a Proposal or other appropriate action as permitted by City ordinance.

All communications must go through the eBid System (IonWave) or the Purchasing Agent assigned to this solicitation, Eric Seifer, at (954)786-4166, or eric.seifer@copbfl.com. Any information that amends any portion of this solicitation received by any method other than an Addendum issued through IonWave is not binding on the City of Pompano Beach.

Carefully read all portions of the RFP document to ensure the Proposer's bid fully complies with all requirements.

Contact Information

Contact: Mr. Eric Seifer Purchasing Supervisor
Address: Purchasing
1010 NE 3rd Avenue
Pompano Beach, FL 33060
Phone: (954) 786-4166
Fax: (954) 786-4168
Email: eric.seifer@copbfl.com

Stantec Consulting Services Inc. Information

Address: 777 S Harbour Island Boulevard
Suite 600
Tampa, FL 33602
Phone: (813) 269-6002
Web Address: www.stantec.com

By submitting this Response I affirm I have received, read and agree to the all terms and conditions as set forth herein. I hereby recognize and agree that upon execution by an authorized officer of the City of Pompano Beach, this Response, together with all documents prepared by or on behalf of the City of Pompano Beach for this solicitation, and the resulting Contract shall become a binding agreement between the parties for the products and services to be provided in accordance with the terms and conditions set forth herein. I further affirm that all information and documentation contained within this response to be true and correct, and that I have the legal authority to submit this response on behalf of the named Supplier (Offeror).

Chelsea Coto
Signature

chelsea.coto@stantec.com
Email

Submitted at 5/18/2026 01:11:45 PM (ET)

Requested Attachments

Proposal

Stantec - Proposal to City of Pompano Beach - RFP 26-040.pdf

Electronic version of proposal must be uploaded to the Response Attachments tab. The file size for uploads is limited to 250 MB. If the file size exceeds 250 MB the response must be split and uploaded as two (2) separate files.

Tier 1/ Tier 2 Local Business Form

Stantec - T1_T2 Compliance Form.pdf

To comply with the City's Local Business Program as a Tier-1 or Tier-2 vendor, you must complete the Tier 1/ Tier 2 Local Business form from the attachments tab and upload it here.

Local Business Program Forms

Stantec - Local Business Program Forms.pdf

Local Business Program Forms from the attachments tab are to be completed and uploaded to this tab.

Cost_ProposalBid

Cost_ProposalBid.xlsx

Bid Attributes

1	**Terms & Conditions** Contractor acknowledges that it has read, understands, and agrees to be bound by all terms, conditions, and specifications contained in this solicitation and any resulting contract. Failure to comply may result in rejection of the response or termination of any resulting agreement. ☑ Agree
2	**Acknowledgement of Addenda** Contractor acknowledges receipt of all addenda issued for this solicitation and certifies that all addenda have been reviewed and incorporated into its response. Failure to acknowledge all addenda may result in rejection of the response as non-responsive. ☑ Agreed

3	**Vendor Certification Regarding Scrutinized Companies Lists (Any Dollar Amount)** Section 215.4725, Florida Statutes, prohibits agencies from contracting (at any dollar amount) with companies on the Scrutinized Companies that Boycott Israel List, or with companies that are engaged in a boycott of Israel. As the person authorized to electronically sign on behalf of Respondent, I hereby certify by selecting the box below that the company responding to this solicitation is not listed on the Scrutinized Companies that Boycott Israel List. I also certify that the company responding to this solicitation is not participating in a boycott of Israel, and is not engaged in business operations in Syria or Cuba. I understand that pursuant to sections 287.135 and 215.4725, Florida Statutes, the submission of a false certification may subject company to civil penalties, attorney's fees, and/or costs. Select yes for Agree, No for disagree on the drop down menu. Yes
4	**Drug-Free Workplace** Contractor certifies that it has implemented and maintains a drug-free workplace program in accordance with Section 287.087, Florida Statutes. Yes
5	**Conflict of Interest** Contractor certifies that it has disclosed any potential conflict of interest, including whether any City of Pompano Beach employee is an owner, officer, or employee of the Contractor's firm. If such a relationship exists, Contractor shall comply with applicable disclosure requirements pursuant to Chapter 112, Florida Statutes. Failure to disclose may result in disqualification or termination of any resulting contract. Yes
6	**If yes, provide details.** No conflicts of interest exist.
7	**Local Business Program Participation & Documentation** **Contractor shall submit all required Local Business Program forms (Exhibits A through D, as applicable) with its response. Forms must be fully completed, including documentation demonstrating compliance with Tier 1 or Tier 2 eligibility requirements, or clearly marked "Not Applicable," as appropriate. Failure to submit the required forms will result in the proposal being deemed non-responsive.** **Contractors seeking Tier 1 or Tier 2 Local Vendor preference, or those identifying Local Vendor subcontractors or subconsultants, must provide all required supporting documentation, including valid Business Tax Receipt(s), and demonstrate compliance with applicable program requirements, including minimum local participation percentages or employee residency thresholds, in accordance with Section 32.40, City of Pompano Beach Code of Ordinances. Failure to meet these requirements will result in denial of Local Vendor preference and loss of any associated evaluation points.** N/A
8	**Business in Good Standing (Florida Division of Corporations)** Is the proposer an active business entity in good standing with the Florida Division of Corporations (Sunbiz)? Yes

RFP26-040 Addendum 1
Willdan Financial Services
Supplier Response

Event Information

Number: RFP26-040 Addendum 1
Title: Utilities Rate, Financial Planning, and Organizational Services
Type: Request for Proposals
Issue Date: 4/23/2026
Deadline: 5/21/2026 02:00 PM (ET)
Notes: The City of Pompano Beach (the “City”) is interested in receiving proposals in response to the attached RFP for Utilities Rate, Financial Planning, and Organizational Services.

Proposers must be registered on the City’s eBid System to view the solicitation documents and respond to this solicitation. The complete solicitation document can be downloaded free of charge from the eBid System at https://pompanobeachfl.ionwave.net/. Proposals must bear the electronic signature of an authorized officer of the Proposer who is legally authorized to enter into a contractual relationship in the Proposer's name. THE CITY will consider the submittal of a proposal as constituting an offer by the Proposer to perform the required services at the prices stated herein. The City is not responsible for the accuracy or completeness of any documentation the Proposer receives from any source other than the eBid System. The Proposer is solely responsible for downloading all required documents. Responses will be electronically unsealed in a public forum and read aloud.

Proposals must be submitted electronically at

(https://pompanobeachfl.ionwave.net), referred to hereinafter as the eBid System, on or before the date and time stated in Section 2 — Schedule of Events. Proposals received after 2:00:00 p.m. ET on the due date will not be considered, and late bids will not be accepted.

Cone of Silence shall take effect once this solicitation is released to the General Public and shall remain in effect until the City Commission has taken final action to approve or reject an award, or otherwise terminate the solicitation. During the Cone of Silence period, Respondents to this solicitation, or persons acting on their behalf, including lobbyists, shall not communicate, directly or indirectly, regarding any aspect of this solicitation with any member of the City Commission, the City Clerk, the City Manager's Office, any Evaluation Committee member, or any other City of Pompano Beach employee, except in writing to the Procurement and Contracts Department staff as expressly permitted in this solicitation. Violation of the Cone of Silence may be grounds for rejection of a Proposal or other appropriate action as permitted by City ordinance.

All communications must go through the eBid System (IonWave) or the Purchasing Agent assigned to this solicitation, Eric Seifer, at (954)786-4166, or eric.seifer@copbfl.com. Any information that amends any portion of this solicitation received by any method other than an Addendum issued through IonWave is not binding on the City of Pompano Beach.

Carefully read all portions of the RFP document to ensure the Proposer's bid fully complies with all requirements.

Contact Information

Contact: Mr. Eric Seifer Purchasing Supervisor
Address: Purchasing
1010 NE 3rd Avenue
Pompano Beach, FL 33060
Phone: (954) 786-4166
Fax: (954) 786-4168
Email: eric.seifer@copbfl.com

Willdan Financial Services Information

Address: 200 S Orange Street
Suite 1550
Orlando, FL 32801
Phone: (800) 755-6864

By submitting this Response I affirm I have received, read and agree to the all terms and conditions as set forth herein. I hereby recognize and agree that upon execution by an authorized officer of the City of Pompano Beach, this Response, together with all documents prepared by or on behalf of the City of Pompano Beach for this solicitation, and the resulting Contract shall become a binding agreement between the parties for the products and services to be provided in accordance with the terms and conditions set forth herein. I further affirm that all information and documentation contained within this response to be true and correct, and that I have the legal authority to submit this response on behalf of the named Supplier (Offeror).

Nicolle Stormon
Signature

NStormon@Willdan.com
Email

Submitted at 5/18/2026 10:52:06 AM (ET)

Requested Attachments

Proposal

Pompano Beach_RFP 26-040_Willdan Financial Services.pdf

Electronic version of proposal must be uploaded to the Response Attachments tab. The file size for uploads is limited to 250 MB. If the file size exceeds 250 MB the response must be split and uploaded as two (2) separate files.

Tier 1/ Tier 2 Local Business Form

T1_T2_Form (1).pdf

To comply with the City's Local Business Program as a Tier-1 or Tier-2 vendor, you must complete the Tier 1/ Tier 2 Local Business form from the attachments tab and upload it here.

Local Business Program Forms

Local Business Program Forms.pdf

Local Business Program Forms from the attachments tab are to be completed and uploaded to this tab.

Cost_ProposalBid

Cost_ProposalBid (2).xlsx

Bid Attributes

1	**Terms & Conditions** Contractor acknowledges that it has read, understands, and agrees to be bound by all terms, conditions, and specifications contained in this solicitation and any resulting contract. Failure to comply may result in rejection of the response or termination of any resulting agreement. ☑ Agree
2	**Acknowledgement of Addenda** Contractor acknowledges receipt of all addenda issued for this solicitation and certifies that all addenda have been reviewed and incorporated into its response. Failure to acknowledge all addenda may result in rejection of the response as non-responsive. ☑ Agreed

3	**Vendor Certification Regarding Scrutinized Companies Lists (Any Dollar Amount)** Section 215.4725, Florida Statutes, prohibits agencies from contracting (at any dollar amount) with companies on the Scrutinized Companies that Boycott Israel List, or with companies that are engaged in a boycott of Israel. As the person authorized to electronically sign on behalf of Respondent, I hereby certify by selecting the box below that the company responding to this solicitation is not listed on the Scrutinized Companies that Boycott Israel List. I also certify that the company responding to this solicitation is not participating in a boycott of Israel, and is not engaged in business operations in Syria or Cuba. I understand that pursuant to sections 287.135 and 215.4725, Florida Statutes, the submission of a false certification may subject company to civil penalties, attorney's fees, and/or costs. Select yes for Agree, No for disagree on the drop down menu. Yes
4	**Drug-Free Workplace** Contractor certifies that it has implemented and maintains a drug-free workplace program in accordance with Section 287.087, Florida Statutes. Yes
5	**Conflict of Interest** Contractor certifies that it has disclosed any potential conflict of interest, including whether any City of Pompano Beach employee is an owner, officer, or employee of the Contractor's firm. If such a relationship exists, Contractor shall comply with applicable disclosure requirements pursuant to Chapter 112, Florida Statutes. Failure to disclose may result in disqualification or termination of any resulting contract. No
6	**If yes, provide details.** No conflict of interest.
7	**Local Business Program Participation & Documentation** **Contractor shall submit all required Local Business Program forms (Exhibits A through D, as applicable) with its response. Forms must be fully completed, including documentation demonstrating compliance with Tier 1 or Tier 2 eligibility requirements, or clearly marked "Not Applicable," as appropriate. Failure to submit the required forms will result in the proposal being deemed non-responsive.** **Contractors seeking Tier 1 or Tier 2 Local Vendor preference, or those identifying Local Vendor subcontractors or subconsultants, must provide all required supporting documentation, including valid Business Tax Receipt(s), and demonstrate compliance with applicable program requirements, including minimum local participation percentages or employee residency thresholds, in accordance with Section 32.40, City of Pompano Beach Code of Ordinances. Failure to meet these requirements will result in denial of Local Vendor preference and loss of any associated evaluation points.** N/A
8	**Business in Good Standing (Florida Division of Corporations)** Is the proposer an active business entity in good standing with the Florida Division of Corporations (Sunbiz)? Yes

LOCAL BUSINESS EXHIBIT “A”
CITY OF POMPANO BEACH, FLORIDA
LOCAL BUSINESS PARTICIPATION FORM

Solicitation Number & Title: RFP 26-040 Utilities Rate, Financial Planning, & Organizational Services Prime Contractor’s Name: Stantec Consulting Services Inc.

Name of Firm, Address	Contact Person, Telephone Number	Type of Work to be Performed/Material to be Purchased	Contract Amount or %
N/A			

LOCAL BUSINESS EXHIBIT “A”

LOCAL BUSINESS EXHIBIT "B"
LOCAL BUSINESS
LETTER OF INTENT TO PERFORM AS A LOCAL SUBCONTRACTOR

Solicitation Number RFP 26-040

TO: Stantec Consulting Services Inc.
(Name of Prime or General Bidder)

The undersigned City of Pompano Beach business intends to perform subcontracting work in connection with the above contract as (check below)

_____ an individual _X_ a corporation

_____ a partnership _____ a joint venture

The undersigned is prepared to perform the following work in connection with the above Contract, as hereafter described in detail:

N/A

at the following price: _____

_____ N/A
(Date) (Print Name of Local Business Contractor)

_____
(Street Address)

_____
(City, State Zip Code)

BY: N/A
(Signature)

IMPORTANT NOTE: Signatures on this form MUST be by an authorized employee of Subcontractor and must be uploaded to the Response Attachment Tab

LOCAL BUSINESS EXHIBIT "B"

LOCAL BUSINESS EXHIBIT "C

LOCAL BUSINESS
UNAVAILABILITY FORM

BID # RFP 26-040

I, Kelly Westover, Senior Principal
(Name and Title)

of Stantec Consulting Services Inc., certify that on the 5th day of

May, 2026, I invited the following LOCAL BUSINESSES to bid work items to be performed in the City of Pompano Beach:

Business Name, Address	Work Items Sought	Form of Bid Sought (i.e., Unit Price, Materials/Labor, Labor Only, etc.)
Projetare, 510 NE 28th Ct, Pompano Beach, FL - Public Outreach - Teaming Partner Request		

Said Local Businesses:

X Did not bid in response to the invitation

___ Submitted a bid which was not the low responsible bid

___ Other:_____

Name and Title: Kelly Westover, Senior Principal

Date: May 13, 2026

Note: Attach additional documents as available.

LOCAL BUSINESS EXHIBIT "D"
GOOD FAITH EFFORT REPORT
LOCAL BUSINESS PARTICIPATION

BID # RFP 26-040

1. What portions of the contract have you identified as Local Business opportunities?

Public Outreach

2. Did you provide adequate information to identified Local Businesses? Please comment on how you provided this information.

Initial email contact included pertinent RFP information, PDF of solicitation for reference, and request for assistance with public outreach services.

3. Did you send written notices to Local Businesses?

____ Yes ___X___ No

If yes, please include copy of the notice and the list of individuals who were forwarded copies of the notices.

4. Did you advertise in local publications?

____ Yes ___X___ No

If yes, please attach copies of the ads, including name and dates of publication.

5. What type of efforts did you make to assist Local Businesses in contracting with you ?

Contacted Projetare via email and phone

7. List the Local Businesses you will utilize and subcontract amount.

N/A _____ $_____

_____ $_____

_____ $_____

8. Other comments: _____

Contacted Projetare via email and phone, recieved no response.

_____

_____

_____

From:	Westover, Kelly
To:	info@projetare.us
Cc:	Coto, Chelsea
Subject:	RE: Teaming Partner for City of Pompano
Date:	Thursday, May 7, 2026 10:12:52 AM
Attachments:	image001.png image002.png image003.png image004.png

Good morning,
I was hoping to talk to someone today about potentially teaming for this proposal. I called the main number and left a message as well.
Best,
Kelly

Kelly Westover, MBA, PMP, CFM
Senior Principal, Management & Technology

Mobile: (941) 504-7239
kelly.westover@stantec.com

Stantec

From: Westover, Kelly
Sent: Tuesday, May 5, 2026 3:07 PM
To: 'info@projetare.us' <info@projetare.us>
Cc: Coto, Chelsea <Chelsea.Coto@stantec.com>
Subject: Teaming Partner for City of Pompano

Hi Mr. Gontijo,

Stantec is submitting a proposal to the City of Pompano to provide Utility Rate, Financial Planning and Organizational Services. We are looking for a local teaming partner to assist with public outreach that may be required as part of the services. As such, we came across your firm located within the City and wanted to initiate a conversation to see if you are interested in teaming with us on this proposal.

If so, Chelsea, copied on this email can provide a list of the information we would need to include in the proposal. Please let me now if you are available and interested to join us.

Best,
Kelly

Kelly Westover, MBA, PMP, CFM
Senior Principal, Management & Technology

Mobile: (941) 504-7239
kelly.westover@stantec.com

Stantec
6920 Professional Parkway, Sarasota FL 34240-8414, United States

Stantec

TIER 1/TIER 2 COMPLIANCE FORM

IN ORDER FOR YOUR FIRM TO COMPLY WITH THE CITY'S LOCAL BUSINESS PROGRAM AS A TIER 1 OR TIER 2 VENDOR, BIDDERS MUST COMPLETE THE INFORMATION BELOW AND UPLOAD THE FORM TO THE RESPONSE ATTACHMENTS TAB IN THE EBID SYSTEM.

TIER 1 LOCAL VENDOR

_____ My firm has maintained a permanent place of business within the city limits and maintains a staffing level, within this local office, of at least 10 % who are residents of the City of Pompano Beach.

And/Or

_____ My firm has maintained a permanent place of business within the city limits and my submittal includes subcontracting commitments to Local Vendors Subcontractors for at least 10 % of the contract value.

Or

X My firm does not qualify as a Tier 1 Vendor.

TIER 2 LOCAL VENDOR

_____ My firm has maintained a permanent place of business within Broward County and maintains a staffing level, within this local office, of at least 15% who are residents of the City of Pompano Beach

And/Or

_____ My firm has maintained a permanent place of business within Broward County and my submittal includes subcontracting commitments to Local Vendors Subcontractors for at least 20% of the contract value.

Or

X My firm does not qualify as a Tier 2 Vendor.

I certify that the above information is true to the best of my knowledge.

May 13, 2026
(Date)

Stantec Consulting Services Inc.
(Name of Firm)

BY: Andrew Burnham
(Name)

LOCAL BUSINESS EXHIBIT "A"
CITY OF POMPANO BEACH, FLORIDA
LOCAL BUSINESS PARTICIPATION FORM

Utilities Rate, Financial Planning, and Organizational Services RFP – 26-040

Solicitation Number & Title: _____ Prime Contractor's Name: **Willdan Financial Services**

Name of Firm, Address	Contact Person, Telephone Number	Type of Work to be Performed/Material to be Purchased	Contract Amount or %
N/A			

LOCAL BUSINESS EXHIBIT "A"

LOCAL BUSINESS EXHIBIT "B"
LOCAL BUSINESS
LETTER OF INTENT TO PERFORM AS A LOCAL SUBCONTRACTOR

Solicitation Number_____

TO: _____
(Name of Prime or General Bidder)

The undersigned City of Pompano Beach business intends to perform subcontracting work in connection with the above contract as (check below)

_____ an individual _____ a corporation

_____ a partnership _____ a joint venture

The undersigned is prepared to perform the following work in connection with the above Contract, as hereafter described in detail:

_____

_____

_____

_____

at the following price: _____

_____ _____
(Date) (Print Name of Local Business Contractor)

_____
(Street Address)

_____
(City, State Zip Code)

BY: _____
(Signature)

IMPORTANT NOTE: Signatures on this form MUST be by an authorized employee of Subcontractor and must be uploaded to the Response Attachment Tab

LOCAL BUSINESS EXHIBIT "B"

LOCAL BUSINESS EXHIBIT "C

LOCAL BUSINESS
UNAVAILABILITY FORM

BID #_____

I,_____
(Name and Title)

of_____, certify that on the _____day of

_____, _____, I invited the following LOCAL BUSINESSES to bid work items to be performed in the City of Pompano Beach:

Business Name, Address	Work Items Sought	Form of Bid Sought (i.e., Unit Price, Materials/Labor, Labor Only, etc.)

Said Local Businesses:

___ Did not bid in response to the invitation

___ Submitted a bid which was not the low responsible bid

___ Other:_____

Name and Title: _____

Date: _____

Note: Attach additional documents as available.

LOCAL BUSINESS EXHIBIT "D"
GOOD FAITH EFFORT REPORT
LOCAL BUSINESS PARTICIPATION

BID #_____

1. What portions of the contract have you identified as Local Business opportunities?

_____

_____

_____

_____

2. Did you provide adequate information to identified Local Businesses? Please comment on how you provided this information.

_____

_____

_____

3. Did you send written notices to Local Businesses?

____ Yes ____ No

If yes, please include copy of the notice and the list of individuals who were forwarded copies of the notices.

4. Did you advertise in local publications?

____ Yes ____ No

If yes, please attach copies of the ads, including name and dates of publication.

5. What type of efforts did you make to assist Local Businesses in contracting with you ?

_____

_____

7. List the Local Businesses you will utilize and subcontract amount.

_____ $_____

_____ $_____

_____ $_____

8. Other comments: _____

_____

_____

_____

_____

TIER 1/TIER 2 COMPLIANCE FORM

IN ORDER FOR YOUR FIRM TO COMPLY WITH THE CITY'S LOCAL BUSINESS PROGRAM AS A TIER 1 OR TIER 2 VENDOR, BIDDERS MUST COMPLETE THE INFORMATION BELOW AND UPLOAD THE FORM TO THE RESPONSE ATTACHMENTS TAB IN THE EBID SYSTEM.

TIER 1 LOCAL VENDOR

_____ My firm has maintained a permanent place of business within the city limits and maintains a staffing level, within this local office, of at least 10 % who are residents of the City of Pompano Beach.

And/Or

_____ My firm has maintained a permanent place of business within the city limits and my submittal includes subcontracting commitments to Local Vendors Subcontractors for at least 10 % of the contract value.

Or

X My firm does not qualify as a Tier 1 Vendor.

TIER 2 LOCAL VENDOR

_____ My firm has maintained a permanent place of business within Broward County and maintains a staffing level, within this local office, of at least 15% who are residents of the City of Pompano Beach

And/Or

_____ My firm has maintained a permanent place of business within Broward County and my submittal includes subcontracting commitments to Local Vendors Subcontractors for at least 20% of the contract value.

Or

X My firm does not qualify as a Tier 2 Vendor.

I certify that the above information is true to the best of my knowledge.

5/15/2026
(Date)

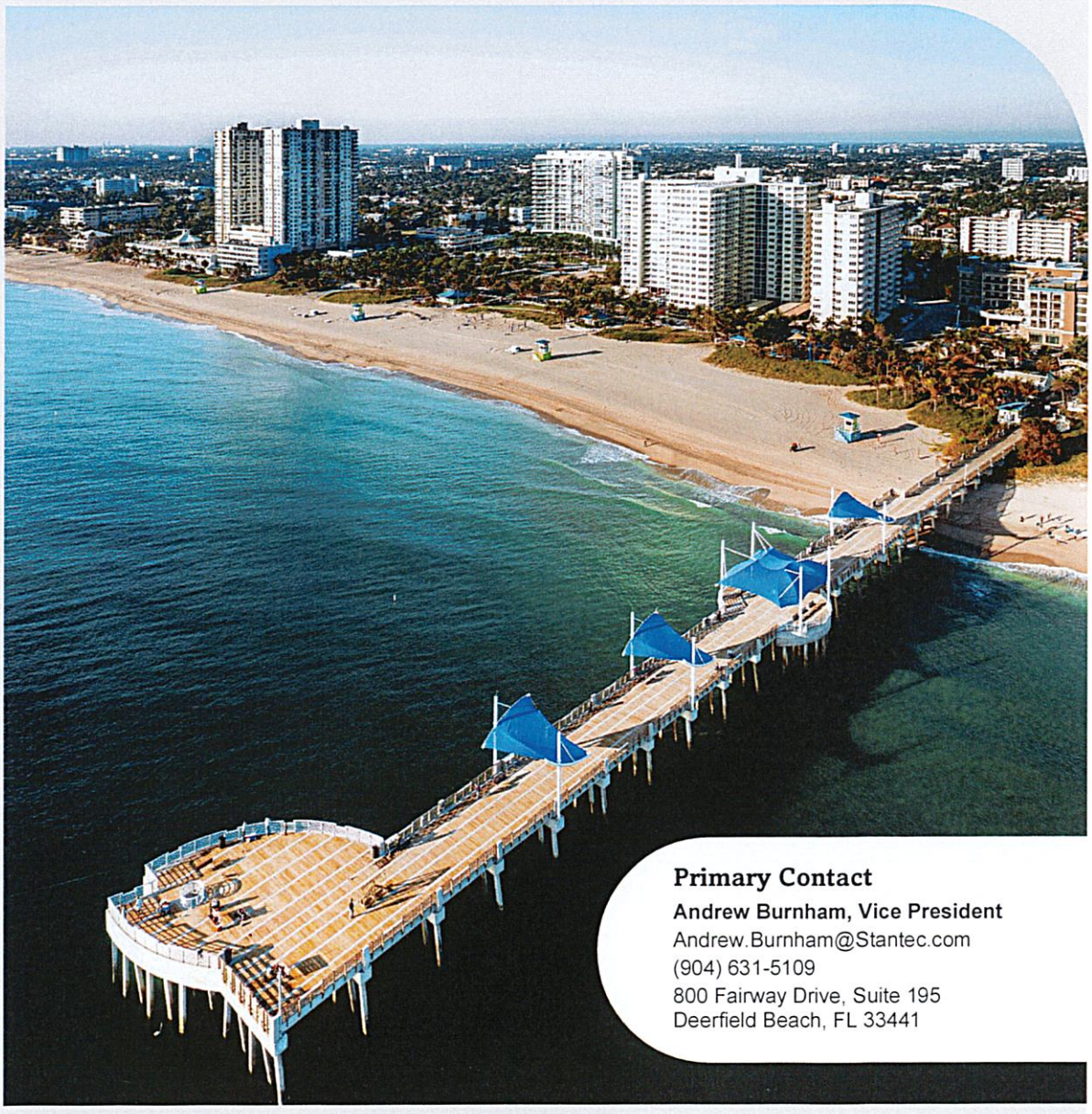
Willdan Financial Services
(Name of Firm)

BY: Daryll Parker **Daryll Parker**
(Name)

Pompano Beach, Florida

RFP 26-040

Utilities Rate, Financial Planning, and Organizational Services



Primary Contact

Andrew Burnham, Vice President
Andrew.Burnham@Stantec.com
(904) 631-5109
800 Fairway Drive, Suite 195
Deerfield Beach, FL 33441

Stantec Consulting Services Inc.

May 18, 2026

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Stantec

Stantec Consulting Services Inc.
800 Fairway Drive, Suite 195
Deerfield Beach, FL 33441

May 18, 2026

Attention
City of Pompano Beach
Procurement & Contracts Dept.
1190 N.E. 3rd Avenue, Bldg C
Pompano Beach, FL 33060

Reference
RFP 26-040
Utilities Rate, Financial Planning, and Organizational Services

Federal Tax ID
11-2167170

Dear Members of the Selection Committee,

Stantec Consulting Services Inc. (Stantec) is pleased to submit our proposal to the City of Pompano Beach (City) in response to RFP 26-040 for Utilities Rate, Financial Planning, and Organizational Services.

As your trusted advisor, Stantec brings an unparalleled, "day-one readiness" to this engagement. Having recently partnered with you to complete the **City of Pompano Beach Utilities Independent Financial & Organizational Review**, we already possess a strong understanding of your immediate operational challenges, funding limitations, infrastructure vulnerabilities, and long-term strategic objectives.

Our Management and Technology Consulting Practice—comprised of 100+ professionals with over 600 years of combined experience—has successfully completed over 1,500 financial planning studies, including work for more than 130 agencies across Florida. However, it is our current knowledge of Pompano Beach's utility systems from the recent review that makes us the ideal partner for this scope of work.

Key Reasons to Select Stantec for this Engagement:

- **Zero Learning Curve for Financial Planning:** Having already identified the Utility's $100+ million Capital Improvement Plan (CIP) funding gap and unsustainable debt reliance during our recent review, we can immediately begin financial modeling given our understanding of existing tools to help the City achieve a greater level of cash reserves and cash-funding of capital projects.
- **Targeted Rate & Development Solutions:** We know that your capacity fees are outdated and that the City lacks formal developer agreements for localized cost recovery. We are ready to leverage our industry experience to create template agreements and update capital cost recovery fees. Moreover, we have identified opportunities for rate structure modifications that enhance conformance with accepted practices and that can help close the capital funding gap.
- **Ready-to-Implement Organizational Redesign:** We previously identified that your lean executive structure and lack of a dedicated infrastructure division forces staff to manage over $60 million in capital per FTE—nearly four times the average of peer agencies. We are prepared to immediately execute structural changes to resolve the resulting reactive decision-making, project delays, and staff burnout.

This proposal reflects our continued commitment to bringing expert knowledge, strategic insights, and proven solutions to the City. We do not need time to study your utility; we are ready to assist in measures to enhance its level of service, sustainability, and efficiency.

We have reviewed your proposed contract terms and believe that should we be selected for this assignment, we will be able to conclude a mutually satisfactory contract with you.

Please feel free to reach out to our **Primary Contact, Andrew Burnham,** with any questions about our proposal or services.

Respectfully,

Stantec Consulting Services Inc.

Andrew Burnham
Vice President
(904) 631-5109
Andrew.Burnham@Stantec.com

1.

Company Profile

About Stantec

Founded in 1954 in Edmonton, Alberta, Canada, Stantec is a global leader in sustainable engineering, architecture, and consulting. The diverse perspectives of our team drive us to think beyond what's previously been done on critical issues like climate change, digital transformation, and future-proofing our cities and infrastructure. We are designers, engineers, scientists, project managers, and strategic advisors. We innovate at the intersection of community, creativity, and client relationships to advance communities everywhere, so that together we can redefine what's possible.

The Stantec community unites more than **34,000 employees working in over 450 locations across the globe** offering a wide range of services to improve communities. Our local strength, knowledge, and relationships, coupled with our world-class expertise, have allowed us to go anywhere to meet our clients' needs in more creative and personalized ways. With long-term commitment to the people and places we serve, Stantec has the unique ability to connect to projects on a personal level and advance the quality of life in communities across the globe. Stantec is a publicly traded corporation on the TSX and NYSE under the symbol STN. Information regarding our corporate governance can be found on our website at Stantec.com.

Stantec's legal structure is that of a public corporation, Stantec Consulting Services Inc. In the past five years, Stantec has continued to expand its global presence and service offerings through several acquisitions. Notable acquisitions include MWH Global in 2016, which significantly increased Stantec's size and capabilities in the water and infrastructure sectors.

Management & Technology Consulting for Utilities

Our Management & Technology Consulting (MTC) sector includes **100+ consultants** working across seven distinct practice areas (see Figure 1). Our team of experts apply a comprehensive understanding of utility management to deliver practical, actionable solutions to the challenges faced by local governments. MTC operates as a collaborative group, drawing on the collective knowledge and experience of its members to create a combination of diverse backgrounds and experiences that make us who we are today - a trusted source to our clients in providing independent and objective utility management and financial services to local governments and utilities. This knowledge sharing and expertise will be brought to the City of Pompano Beach so you can be confident that our team will develop comprehensive, balanced solutions tailored to your utility's needs.

600+
Combined years of experience

>500
Communities in our benchmarking database

>30%
Of the U.S. population served

$6B+
Debt issued for communities in the last 5 years

Management & Technology Consulting Areas			
Financial Services Sustainable, affordable, equitable financial planning and utility rate structures	**Strategic Planning & Implementation** Transform agencies through people/process changes and implementation	**Systems Integrations** Asset information systems and data management solutions	**Asset Management** Maximize performance, governance and sustainability
	Funding Identify, secure and manage alternative funding (grants / loans)	**Economics** Unbiased benefit cost analysis and forecasting	**Technology** Data analytics and digital planning to improve performance

Figure 1. Full suite of practice areas offered by our MTC sector.

Financial Services

Stantec's Financial Services team delivers specialized financial analysis with a strong focus on fiscal planning and utility rate study for public sector entities. Figure 2 outlines the core financial consulting services provided to **over 350 communities throughout the United States**, bringing deep insight into the challenges faced by utilities. Our work is grounded in a holistic understanding of government functions, enabling us to craft solutions that are practical, transparent, and implementable.

Rate Studies	
• Water/Sewer/Reclaimed	• Stormwater
• Electric & Natural Gas	• Solid Waste & Recycling
Cost-of-Service Analysis	
• Wholesale/Outside-City Rates	• Regionalization Studies
• Interlocal Agreements	• Customer Class Allocations
System Development Fees / Capacity Charges	
• Utilities & Other Services	• Fee/Charge Structure
• Expert Witness Services	• Development Policies
Financial Planning & Capital Funding	
• Policies, Targets & KPI's	• Demand Forecasting
• Bond Feasibility Studies	• Project Funding Strategies
Benchmarking	
• Database of 500+ Entities	• Key Financial Metrics
• Audited Financials & Rates	• Custom Group Comparisons
Affordability	
• Actual Bills & Incomes	• Regulatory Support
• Multiple Metrics & Thresholds	• Assistance Programs
Strategy & Management	
• IT Planning & Implementation	• O&M and CIP Optimization
• Strategic Plans	• Performance Measures
• Asset Management	• Level of Service Development
• Business Process Mapping	• Real Estate Advisory Services

Figure 2. Utilities financial consulting core services.

We help public agencies assess their financial health and plan strategically for long-term sustainability. Our services include comprehensive financial modeling, scenario planning, and utility rate analysis, all tailored to support effective resource allocation and informed decision-making. Backed by extensive experience supporting utility providers both locally and globally, our team of financial experts excels at identifying root causes of financial pressures and developing actionable strategies to address them. We support both immediate needs and long-range planning, allowing our clients to remain agile in a dynamic environment. Effective financial planning requires evaluating innovative, data-driven solutions that account for risk, capacity, system efficiency, and service reliability. Our consultants work closely with clients to develop adaptable financial plans and innovative rate structures. By emphasizing transparency, risk management, and community engagement, we help local governments maintain fiscal stability while continuing to invest in critical infrastructure and services.

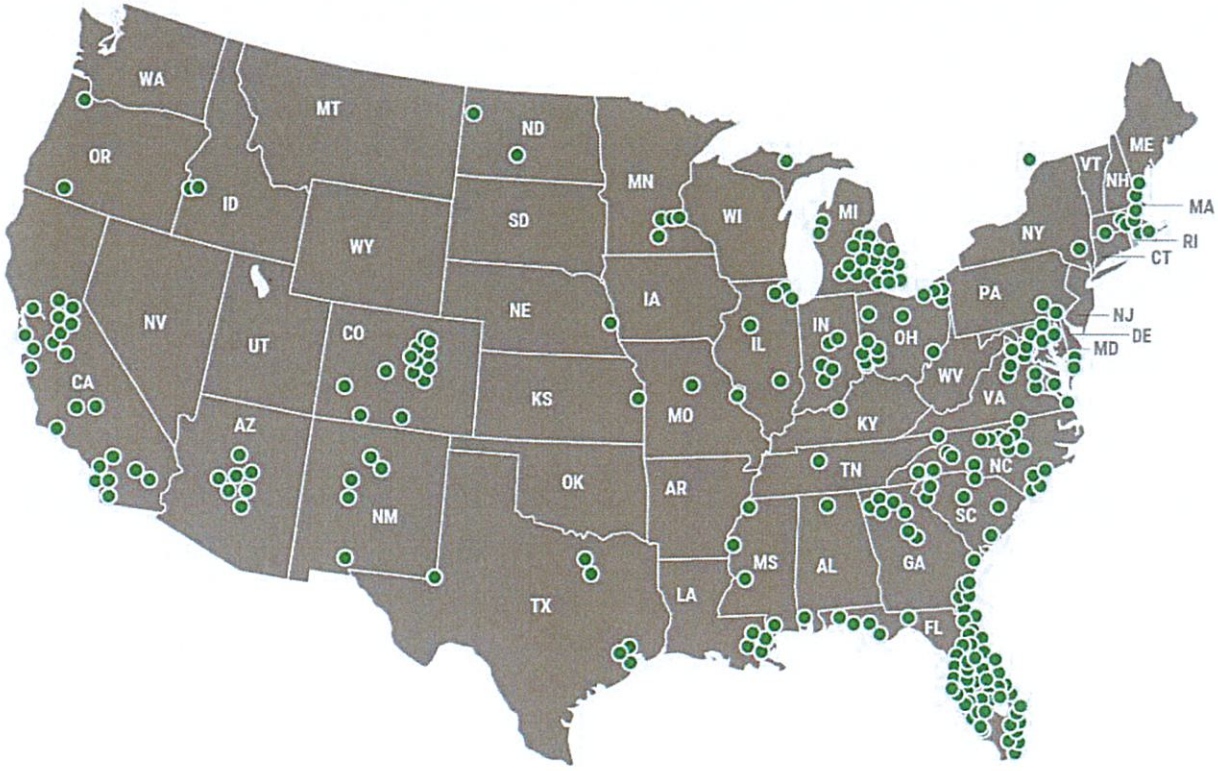


Figure 3. Map of select financial services clients in the United States.

Strategic Planning & Implementation

Navigating the complexities of modern utility management requires more than just reactive problem-solving; it demands a visionary approach that bridges the gap between immediate financial needs and long-term strategic goals. Our Strategic Planning and Implementation consulting services are specifically designed to empower municipalities to overcome critical challenges and include organizational structure assessments, change management and training, staffing and operations review, restructuring recommendations, performance metrics, and succession planning. By integrating advanced financial forecasting, equitable rate structure design, and comprehensive organizational restructuring, we deliver a prioritized, multi-year strategic roadmap tailored to your utility's unique operational realities. Leveraging proven industry methodologies like the Effective Utility Management (EUM) (see Figure 4) Continuous Improvement Framework and the Prosci ADKAR® Model for change management, our team ensures that every customized solution is not only financially resilient and legally defensible but also seamlessly adopted by your workforce and embraced by the community. From optimizing development services and securing vital grant funding to fostering transparent stakeholder engagement, we partner with you to transform complex utility challenges into sustainable, cost-effective service delivery that protects both your infrastructure and your ratepayers.

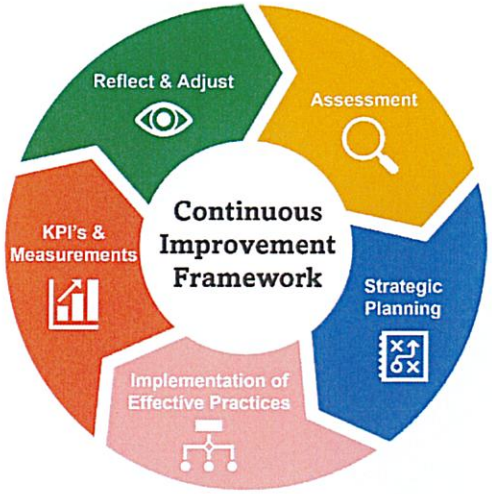


Figure 4. Continuous Improvement Framework.

Funding

Identifying a project is easy. Finding funding is not. Our team understands how challenging and time consuming it can be to identify funding sources, navigate the application process in a competitive environment, and manage the funds once awarded. We work with you to understand the projects that are most important to your community or organization, and demystify the funding process. With Stantec, you have an integrated team of resources at your fingertips–not only grant writers–but experienced financial consultants, engineers, urban planners, architects, and scientists. We help turn your plans into projects by simplifying a complex and competitive process with nimble project teams that help your project stand out from the rest. We support you every step of the way.

Our team has supported the issuance of $5B+ in municipal debt through bond feasibility analyses, WIFIA loan applications, and State Revolving Fund loan assistance, and regularly work with the credit rating agencies to ensure understanding and application of most current credit rating methodologies and metrics that can be applied to the financial management. We believe that funding services is a natural and complementary extension of the other technical and professional services we offer as a firm. For 30+ years, Stantec has partnered with our clients over the years to successfully apply for and secure over $8 billion in grants and loans ranging in value from $10,000 to over $1 billion, for projects small and large. Figure 5 shows the distribution of the $6.3 billion in total awards we secured for clients since 2021. We believe every dollar counts in seeing projects to completion. Through our North American Funding Program (NAFP), we have a team of over 250 funding specialists with expertise and knowledge of over 100 different funding programs across various infrastructure sectors.

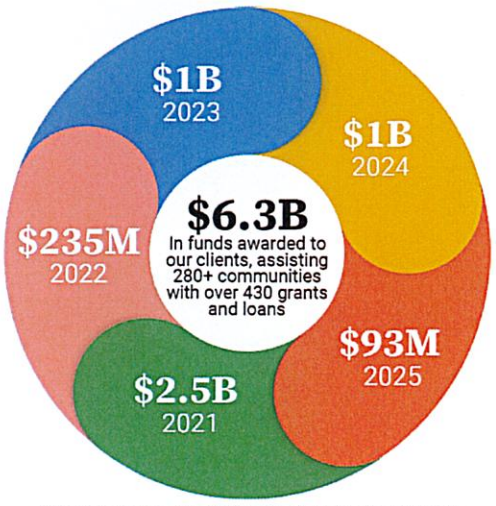


Figure 5. Total awards for clients in the last 5 years.

Organizational Structure & Key Personnel

The Stantec project team brings unmatched expertise and experience to the City. **Project Manager Andrew Burnham** brings over 24 years of experience in municipal utility finance and rate setting. The following organizational chart presents our project team composed of professionals with vast experience in rate and evaluation consulting in communities across Florida. We have aligned subject matter experts with areas of focus for the City. Each SME will specialize in their area of expertise and work closely with project management to meet the City's needs. Full resumes for each team member are included in the appendix for your reference.

Primary Contact
Andrew Burnham
Vice President
(904) 631-5109
Andrew.Burnham@Stantec.com

For each Work Authorization issued by the City, Stantec's Project Manager will be responsible for overall coordination, direction, and primary communication with the City. A Deputy Project Manager will provide continuity and support day-to-day execution as needed. Quality Control (QC) oversight will be provided by a senior reviewer independent of day-to-day production to ensure technical accuracy, consistency, and adherence to the City's requirements. One or more Subject Matter Experts (SME) will be assigned based on the specific technical needs of the Work Authorization (e.g., rate design, financial modeling, organizational assessment). The assigned project Consultant will guide Analysts and lead the performance of technical analyses, modeling, and drafting documentation under the direction of the Project Manager and SME, while Administrative Support will assist with billing and document control. Staffing for each Work Authorization will be tailored to the scope and complexity of the assigned task and identified in the corresponding Work Authorization proposal submitted to the City.

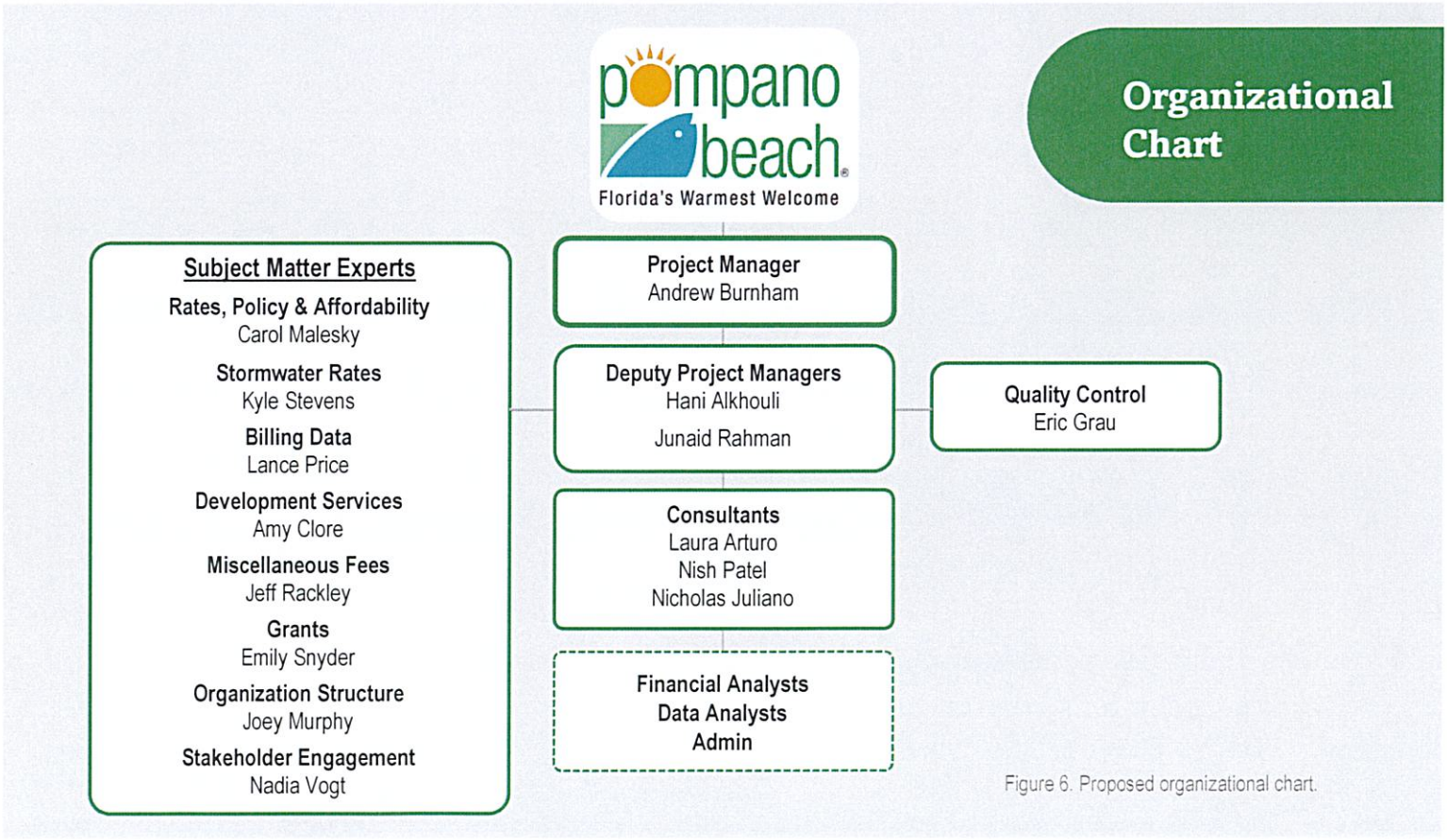


Figure 6. Proposed organizational chart.

Meet Your Key Personnel

We have included brief introductions for our key personnel that are committed to the City on the following pages. Detailed resumes for each team member can be found in Section 4. Project Team & Key Personnel.

Andrew Burnham

Role: Director / Project Manager
Office: Tampa, FL

As Director / Project Manager, Andrew will apply his 24 years of experience to identify appropriate strategies and approaches, lead project execution, verify deliverables meet objectives, coordinate team resources, and maintain effective communication with stakeholders throughout each assignment.

Hani Alkhouli

MIAM, Prosci, CPM

Role: Deputy Project Manager
Office: Tampa, FL

As Deputy Project Manager, Hani will apply his 29 years of experience to support project leadership, coordinate day-to-day activities, oversee work product development, and deliver all project components in a timely manner, keeping each assignment on schedule and within budget.

Junaid Rahman

CPA, Prosci, CPM

Role: Deputy Project Manager
Office: Tampa, FL

As Deputy Project Manager, Junaid will apply his 27 years of experience to support project leadership, coordinate day-to-day activities, oversee work product development, and deliver all project components in a timely manner, keeping each assignment on schedule and within budget.

Eric Grau

MBA, PMP

Role: Quality Control
Office: Jacksonville, FL

As Quality Control, Eric will apply his 21 years of experience to review all data, models, and deliverables for accuracy, consistency, and completeness, confirming work products meet technical standards and project requirements.

Carol Malesky

Role: Rates, Policy, & Affordability
Office: Cleveland, OH

As Rates, Policy, & Affordability SME, Carol will apply her 29 years of experience to develop rate structures, analyze affordability, develop customer assistance programs, recommend customer-centric policy options, and align rates with financial and equity objectives.

Kyle Stevens

Role: Stormwater Rates
Office: Tampa, FL

As Stormwater SME, Kyle will apply his 15 years of experience to analyze stormwater program costs, develop equitable rate structures, identify credit programs, and support funding adequacy for infrastructure and regulatory compliance needs.

Lance Price

Role: Billing Data
Office: Naples, FL

As Utility Billing Data SME, Lance will apply his 12 years of experience to analyze utility billing data, validate customer consumption patterns, and verify data accuracy for rate modeling and revenue projections.

Amy Clore

PMP, DBIA

Role: Development Services
Office: Tampa, FL

As Development Services SME, Amy will apply her 22 years of experience to evaluate development-related fees, assess cost recovery methodologies, develop standard template agreements, engage with the development community, and develop processes that align with industry practices.

Jeff Rackley

MBA, PMP

Role: Miscellaneous Fees
Office: Tampa, FL

As Miscellaneous Fees SME, Jeff will apply his 22 years of experience to evaluate miscellaneous service charges, assess cost justification, perform benchmarking, and recommend fee levels that achieve appropriate cost recovery.

Emily Snyder

Role: Grants
Office: Asheville, NC

As Grants SME, Emily will apply her 20 years of experience to identify funding opportunities, support grant applications, and guide compliance activities and tracking for the City's utility systems.

Joey Murphy

Prosci Certified

Role: Organizational Structure
Office: Mobile, AL

As Organizational Structure SME, Joey will apply his 30 years of experience to assess organizational effectiveness, recommend structural improvements, and guide implementation of best practices for operations and staffing.

Nadia Vogt

Role: Stakeholder Engagement
Office: Mequon, OH

As Stakeholder Engagement SME, Nadia will apply her 16 years of experience in facilitating public outreach, coordinating stakeholder meetings, developing communication materials, and developing/leading public engagement plans.

Laura Arturo

Role: Consultant
Office: Coral Gables, FL

As Consultant, Laura will apply her 7 years of experience to analyze financial data, develop rate and capacity fee models, prepare pro formas for bond issuances, and support presentations and stakeholder engagement activities.

Nish Patel

Role: Consultant
Office: Tampa, FL

As Consultant, Nish will apply his 4 years of experience to conduct cost-of-service analyses, evaluate rate structures, assist with financial projections, and contribute to technical report development (including bond feasibility reports).

Nick Juliano

Role: Consultant
Office: Tampa, FL

As Consultant, Nick will apply his 6 years of experience to support rate study development, perform data analysis, prepare financial schedules, support bond issuances, and lead the development of all types of reports and public presentations.

Conflicts of Interest

Stantec hereby represents that, to the best of its knowledge, there are no officers, directors, agents, or immediate family members (defined as spouse, parent, sibling, or child) of Stantec who are employees, elected officials, or appointed officials of the City of Pompano Beach. Further, Stantec affirms that no City of Pompano Beach employee, elected official, or appointed official owns, either directly or indirectly, an interest of ten percent (10%) or more in Stantec or any of its affiliates. Accordingly, Stantec confirms that no conflicts of interest exist with respect to this solicitation.

Litigation

There are no unsatisfied judgments or arbitration awards outstanding against Stantec. Stantec does have some legal proceedings, lawsuits or claims pending. These are a normal part of professional services industries. All have been reported to Stantec's insurers who are in the process of adjusting/managing them. None will have a material effect on the financial position of the company or its ability to undertake this assignment. Stantec seeks to deal with client concerns and claims promptly and fairly through its Risk Management group. As a public company, Stantec has substantial assets and maintains a high professional liability insurance limit. Stantec's claim history has resulted in relatively low insurance premiums when compared with firms of similar size and character.

Office Locations

The office locations from which Stantec's key personnel will support this contract are identified in Table 1 – Office Locations, including the primary office location for the Project Manager and other core team members. Our core team is primarily located in Tampa, Florida allowing us to provide timely on-site support and coordination as we do for all of our 100+ clients across the state. Moreover, our technical team is composed of subject matter experts sourced from offices throughout the country, allowing us to provide industry leading expertise to the City.

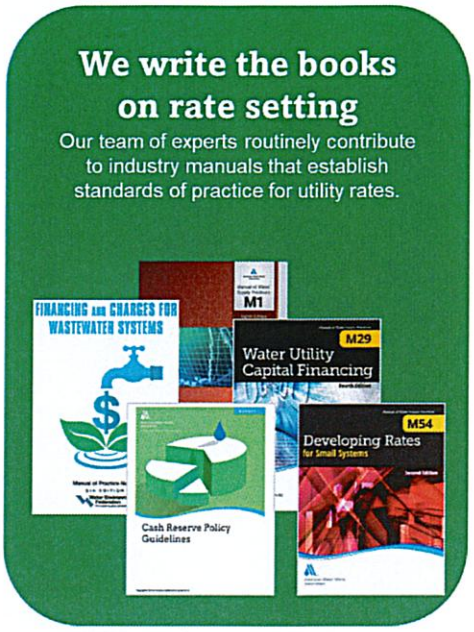
Location	Address	Key Personnel		
Tampa (Primary Office)	777 S Harbour Island Boulevard, Suite 600, Tampa, FL 33602	Andrew Burnham Nicholas Juliano	Junaid Rahman Hani Alkhouli	Amy Clore Nish Patel
Coral Gables	901 Ponce de Leon Boulevard, Suite 900, Coral Gables, FL 33134	Laura Arturo		
Jacksonville	4651 Salisbury Road, Suite 350, Jacksonville, FL 32256	Eric Grau		
Naples	3510 Kraft Road, Suite 200, Naples, FL 34105	Lance Price		
Tallahassee	1701 Hermitage Boulevard, Suite 102, Tallahassee, FL 32308	Jeff Rackley		
Mobile	1110 Montlimar Drive, Suite 920, Mobile, AL 36609	Joey Murphy		
Asheville	56 College Street, Suite 201, Asheville, NC 28801	Emily Snyder		
Cleveland	1001 Lakeside Avenue East, Suite 1600, Cleveland, OH 44114	Carol Malesky		
Mequon	12308 North Corporate Parkway Suite 600, Mequon, WI 53092	Nadia Vogt		

Table 1. Office locations.

2.

Experience & Qualifications

Industry Experts



As showcased throughout this proposal, Stantec has a team of industry experts poised to provide the highest level of service to the City. These leaders, including our proposed Project Manager, are widely recognized as **experts in the utility rate, financial planning, and management consulting industry,** and have:

- Contributed to AWWA rate manuals M-1 and M-54
- Contributed to WEF's wastewater rate Manual of Practice No. 27
- Contributed to AWWA's capital financing manual M-29
- Contributed to and drove creation of AWWA's cash reserve policy statement
- Served as chair to AWWA's Rates and Charges Committee
- Provided testimony and expert witness services in multiple states
- Conducted rate training for AWWA, WEF, Michigan State University, the Carl Vision Institute of Government, and private organizations

Our industry expertise spans decades and includes working with utility systems of all sizes—from small, rural operations to some of the largest and most complex municipal utilities in the country. This breadth of experience allows us to bring both time-tested best practices and innovative, forward-thinking strategies to every engagement. We understand the unique financial, regulatory, and operational pressures that public utilities face, and we tailor our approach to meet each client's specific needs. Our long history of serving Florida communities provides valuable local context, while our national and international project experience broadens our perspective and enhances our ability to identify transferrable, effective solutions. This combination of deep local knowledge and wide-ranging industry expertise positions our team to uniquely support the City in achieving its financial and organizational goals.

Florida Experience

The majority of Stantec's project team is based in Florida and supported by a large, established team that has extensive experience serving municipal water, wastewater, and stormwater utilities across the state. Our team's local presence not only enhances our understanding of the unique challenges and regulatory environment facing Florida cities, but also reflects our long-standing commitment to serving public agencies across the state. We have a strong and successful track record of partnering with Florida communities to deliver financial management services that are practical, transparent, and results driven.

We have supported many counties and municipalities throughout Florida, helping them make informed decisions, maintain fiscal sustainability, and communicate clearly with stakeholders. This deep familiarity with local government operations, combined with our technical expertise, makes us uniquely suited to meet the City's goals and deliver effective, customized solutions. Our team has had the pleasure of working with over 130 local governments across Florida, including 13 clients in Broward County, as shown on the county map in Figure 7.

Figure 7. Map of our Broward County clients.

Matrix of Florida Client Projects

Table 2 summarizes representative Florida client projects completed by Stantec that are relevant to the services requested under this RFP.

Table 2. Matrix of Florida client projects.

Client	Population	Revenue Requirements	Cost of Service Analysis	Rate Structure Dev.	Wholesale / Bulk Rate	Capacity / Impact Fees	Miscellaneous Fees	Affordability Studies / WARi	Debt Issuance Support	Litigation / Expert Witness	Capital Project Funding	Custom Model & Tool Dev.	Policies & Benchmarking	Public Engagement	Utility Valuation Analysis	Demand Forecasting	Regional Cost Allocation	Special Assessments	Sustainability Analysis	Ordinance/Agreement	Stormwater Feasibility
Alachua County	291,782	●	●									●		●				●			
Brevard County	658,447	●	●								●	●	●	●				●			
Citrus County	170,174	●	●	●	●					●	●	●	●	●	●	●					
City of Atlantic Beach	13,279	●	●	●	●	●			●		●	●	●	●		●				●	
City of Avon Park	10,415	●	●									●		●				●			
City of Belleair Beach	1,615	●	●	●					●		●	●	●					●	●	●	●
City of Bonita Springs	57,112	●	●	●								●	●			●				●	●
City of Bunnell	4,120	●	●	●	●	●					●	●	●	●		●				●	
City of Cape Coral	233,025	●	●	●	●	●	●		●		●	●	●	●		●	●	●	●	●	
City of Casselberry	31,650	●	●	●	●	●	●				●	●	●	●		●				●	
City of Clearwater	116,811	●	●	●	●	●	●		●		●	●	●	●		●			●	●	●
City of Cocoa	19,909	●	●	●	●	●	●		●	●	●	●	●	●		●	●	●	●	●	●
City of Coconut Creek	59,721	●	●	●	●	●	●				●	●	●	●	●	●	●	●		●	
City of Cooper City	35,541	●	●	●	●		●					●						●			
City of Coral Springs	140,808	●	●	●	●	●	●				●	●	●	●	●	●				●	
City of Crystal River	3,661	●	●	●	●	●	●				●	●	●	●		●				●	●
City of Davenport	16,764	●	●	●	●		●					●	●								
City of Daytona Beach	86,015	●	●	●	●	●	●				●	●	●	●		●		●		●	
City of Delray Beach	70,140	●	●									●	●					●			
City of Deltona	100,513	●	●	●	●	●	●				●	●	●	●				●	●		
City of Dunedin	35,932	●	●	●		●			●		●	●	●	●		●				●	●
City of Dunnellon	2,043	●	●	●	●	●	●		●	●	●	●	●	●	●	●				●	
City of Edgewater	24,334	●	●	●	●	●	●		●		●	●	●	●		●	●			●	
City of Fernandina Beach	13,672	●	●	●		●	●			●	●	●	●	●	●	●				●	
City of Fort Lauderdale	190,641	●	●	●	●	●	●		●		●	●	●	●		●	●	●	●	●	●
City of Fort Myers	99,918	●	●	●	●	●	●		●		●	●	●	●	●	●	●	●	●	●	●
City of Gulfport	11,645	●									●	●	●			●					●
City of Holly Hill	13,183	●	●	●																	
City of Hollywood	159,073	●		●	●					●	●						●		●	●	●
City of Indian Rocks Beach	3,637	●	●	●							●	●	●	●	●					●	
City of Jacksonville Beach	23,630	●	●	●							●	●	●	●		●				●	
City of LaBelle	5,472	●	●	●		●	●		●		●	●	●	●		●				●	
City of Lake City	12,783	●	●	●		●	●					●	●	●		●		●		●	
City of Lake Helen	2,988	●	●									●		●				●			
City of Lake Worth Beach	44,417	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●		●	●	●
City of Largo	82,337	●	●	●								●						●	●		
City of Lynn Haven	21,954	●	●	●		●	●				●	●	●	●		●		●	●	●	●
City of Marco Island	16,554	●	●	●		●	●				●	●	●	●		●				●	

Client	Population	Revenue Requirements	Cost of Service Analysis	Rate Structure Dev.	Wholesale / Bulk Rate	Capacity / Impact Fees	Miscellaneous Fees	Affordability Studies / WARi	Debt Issuance Support	Litigation / Expert Witness	Capital Project Funding	Custom Model & Tool Dev.	Policies & Benchmarking	Public Engagement	Utility Valuation Analysis	Demand Forecasting	Regional Cost Allocation	Special Assessments	Sustainability Analysis	Ordinance/Agreement	Stormwater Feasibility
City of Melbourne	87,561	●	●	●			●					●									
City of Miami Beach	83,251	●	●	●								●						●			●
City of Minneola	19,675	●	●	●		●	●					●									
City of Miramar	143,242	●	●										●	●					●		
City of Mount Dora	18,261	●	●	●		●	●					●	●	●							●
City of Naples	20,168	●	●	●	●	●	●				●	●	●	●		●				●	●
City of Neptune Beach	7,032	●	●	●		●	●		●		●	●	●	●		●				●	
City of New Port Richey	18,130	●	●	●	●	●	●		●		●	●	●	●	●	●	●		●	●	
City of North Port	92,875	●	●	●					●		●	●	●	●		●		●		●	●
City of Ocala	70,251	●	●	●		●	●					●	●	●				●		●	
City of Ocoee	51,269	●	●	●		●	●					●									
City of Opa-locka	16,507	●	●	●		●	●		●		●	●	●	●		●				●	●
City of Orange City	15,257	●	●	●		●	●					●						●			●
City of Palatka	10,867	●	●	●		●	●				●	●	●	●		●		●		●	
City of Palm Bay	142,023	●	●	●		●					●	●	●	●				●	●	●	
City of Palmetto	13,682	●	●	●		●	●				●	●	●	●		●				●	●
City of Pembroke Pines	179,326	●	●	●	●	●	●			●	●	●	●			●	●		●	●	
City of Pinellas Park	53,503	●	●	●							●	●	●	●		●				●	●
City of Plant City	43,046	●	●	●		●	●				●	●	●	●		●			●	●	
City of Polk City	3,076	●	●	●		●	●		●		●	●	●	●		●				●	
City of Pompano Beach	**118,104**	●		●		●	●				●		●								
City of Port Orange	66,556	●	●								●	●	●	●		●					●
City of Port Richey	3,637	●	●	●		●	●				●	●	●	●		●				●	
City of Port St. Joe	3,856	●	●	●	●	●	●				●	●	●	●		●				●	
City of Port St. Lucie	258,575	●	●						●		●	●	●						●	●	●
City of Punta Gorda	20,416	●	●	●	●	●	●				●	●	●	●		●			●	●	
City of Safety Harbor	16,972	●	●	●							●	●	●	●		●				●	●
City of Sarasota	57,764	●	●	●	●	●	●				●	●	●	●		●				●	●
City of St. Cloud	71,036	●	●	●	●	●	●		●		●	●	●	●		●			●	●	●
City of St. Pete Beach	8,730	●				●	●				●	●	●	●						●	●
City of St. Petersburg	267,102	●	●	●	●	●	●	●	●	●	●	●	●	●		●	●			●	●
City of Stuart	19,566	●	●	●								●	●	●				●		●	
City of Tallahassee	205,089	●	●	●								●									
City of Tamarac	75,147	●	●	●		●	●				●	●	●	●		●				●	
City of Tarpon Springs	26,168	●	●	●	●	●	●		●		●	●	●	●		●			●	●	●
City of Temple Terrace	27,588	●									●	●	●	●		●			●		
City of Venice	29,902	●	●	●	●	●	●		●		●	●	●	●		●		●	●	●	●
City of Wauchula	4,984	●	●	●			●				●	●	●	●		●				●	
City of Wildwood	19,031	●	●	●	●	●	●				●	●	●	●	●	●	●			●	
City of Zephyrhills	22,304	●	●	●		●	●				●	●	●	●		●		●	●	●	
Clay County Utility Authority	116,000	●	●	●	●	●	●					●									
Collier County	416,233	●	●	●	●	●	●				●	●	●	●		●				●	●
Desoto County	36,744	●		●		●	●				●	●	●	●		●		●		●	

Client	Population	Revenue Requirements	Cost of Service Analysis	Rate Structure Dev.	Wholesale / Bulk Rate	Capacity / Impact Fees	Miscellaneous Fees	Affordability Studies / WARi	Debt Issuance Support	Litigation / Expert Witness	Capital Project Funding	Custom Model & Tool Dev.	Policies & Benchmarking	Public Engagement	Utility Valuation Analysis	Demand Forecasting	Regional Cost Allocation	Special Assessments	Sustainability Analysis	Ordinance/Agreement	Stormwater Feasibility
Gateway Services Community Dev. District	20,000	●	●	●		●	●		●	●	●	●	●	●		●				●	
Glades County	13,132	●	●	●								●									
Harmony Community Development District	7,200	●	●	●								●									
Inlet Beach Water System	1,000	●	●	●								●									
JEA	407,161	●	●	●		●	●				●	●	●	●	●		●	●	●	●	
Lake St. Charles Community Dev. District	2,000	●	●									●						●	●		
Lee County	860,959	●	●									●						●			
Marion County Utilities	428,905	●	●	●	●	●	●		●		●	●	●	●	●	●	●		●	●	
Nassau County	104,376	●	●	●	●	●	●				●	●	●	●		●			●	●	
North River Fire District	15,000					●							●	●						●	
Okaloosa County	220,483	●	●	●	●	●	●		●		●	●	●	●	●	●				●	
Okeechobee County	42,369	●	●	●	●	●	●				●	●	●	●		●		●	●		
Orange County	1,533,646	●	●	●	●	●	●		●		●	●	●	●		●	●			●	
Pasco County	659,114	●	●	●	●	●	●				●	●	●	●	●	●			●	●	●
Peace River Manasota Regional Water Authority	900,000	●	●	●	●	●	●		●		●	●	●	●	●		●			●	
Pinellas County	965,870	●	●	●	●		●	●			●	●	●	●		●		●	●	●	●
Plantation Bay Utility Co.	3,522	●	●	●	●						●	●									
Polk County	852,878				●	●	●					●	●								
Putnam County	77,301	●	●									●		●				●			
Sarasota County	476,604										●	●		●						●	
Seminole County	494,605	●	●	●	●	●	●		●		●	●	●	●	●	●	●			●	
St. Johns River Water Management District	4,730,000	●	●					●		●		●	●			●	●				
Sun n' Lake of Sebring Improvement District	13,000	●	●	●	●	●	●					●						●			
The Villages	150,000	●			●		●				●	●	●	●		●				●	
Toho Water Authority	160,000	●	●	●	●	●	●	●	●		●	●	●	●		●	●			●	
Town of Beverly Beach	520	●	●									●	●								
Town of Davie	112,052	●	●			●						●	●		●						
Town of Lady Lake	17,288	●	●	●		●	●				●	●	●	●					●	●	
Town of Lake Clarke Shore	3,629	●	●									●									
Town of Lauderdale-by-the-Sea	6,365	●	●									●						●			
Town of Longboat Key	7,463	●	●								●	●									
Town of Orange Park	8,993	●	●	●		●	●				●	●	●	●		●				●	
Village of Key Biscayne	15,111	●					●				●	●	●	●				●		●	●
Village of Miami Shores	11,917	●	●	●							●	●	●	●				●	●	●	●
Village of Royal Palm Beach	41,948	●	●									●							●		
Volusia County	602,772	●	●	●	●							●					●			●	
West Villages Improvement District	10,000	●	●	●								●	●	●							

Relevant Experience in Scope Areas

Revenue Sufficiency, Cost-of-Service, and Rate Design Experience

We have 600+ years of combined professional experience and have successfully completed more than 1,500 financial planning and fee studies for local governments nationwide. As such, we don't just follow industry standards—we set them, with our experts (including our Project Manager) routinely contributing to the authoritative rate-setting manuals published by the American Water Works Association (AWWA) and the Water Environment Federation (WEF). Our dynamic, interactive approach simplifies complex financial concepts, enabling transparent decision-making that bridges the gap between utility needs and ratepayer affordability.

CASE STUDIES

Pasco County, FL | Utility Rate & Financial Consulting

Since being awarded a continuing services contract in 2016, our firm has served as a premier trusted advisor to Pasco County, successfully completing more than 35 specialized task orders. Our comprehensive consulting services have spanned the County's entire public works portfolio, including water, wastewater, reclaimed water, stormwater, and solid waste utilities.

Scope of Work: To support the rapid expansion of Pasco County's utilities, Stantec delivered annual revenue sufficiency analyses and comprehensive rate studies aimed at developing a sustainable capital funding strategy. We allocated costs between water, sewer, and reclaimed water services, as well as between retail and bulk users, to inform a highly customized rate design. The scope also integrated alternative capital financing scenarios, bond support, reserve policies, and targeted debt coverage ratios.

To deliver a truly holistic financial strategy that serves the County's long-term objectives, our expanded scope of services included, Dynamic Financial Modeling, Impact & Connection Fee Optimization, Utility System Valuations, Executive Policy Guidance, and Diversified Feasibility Studies.

Outcomes:

Commission Approval: Our data-driven rate structures and financial management plans were universally adopted and implemented by the County Commission as a direct result of both the 2017, 2021, and 2025 comprehensive study cycles.

Growth-Ready Financial Stability: The implemented rates sustainably fund the operating and capital costs of their fast-growing system, enabling the execution of a robust capital improvement program utilizing an optimized mix of debt, cash, capacity charges, grants, and other diversified sources.

Long-Term Operational Integration: Because our deliverables are designed for practical, real-world application, Pasco County now relies on our FAMS model as an integral daily tool for their capital planning scenarios and annual decision-making processes for budgeting and financing.

City of Palm Bay, FL | Financial and Rate Consulting Services

Scope of Work: Stantec served as the Project and Client Manager tasked with developing the City's water and wastewater utility financial sustainability model. We performed 10-year revenue sufficiency analyses and delivered a comprehensive cost-of-service and rate design study.

Outcomes

Successful Implementation: The City seamlessly adopted the recommended rate adjustments and structural modifications we designed.

Objective Alignment: The newly enacted rate structure provided the precise financial footing the utility needed to better meet its operational and strategic objectives.

Utility Billing and Consumption Data Analysis

Your utility data is one of your most valuable assets. Modern utilities generate massive amounts of information, and our consultants are industry-recognized experts at managing large, complex datasets and transforming them into actionable, strategic insights. Whether we are performing detailed customer billing analyses of millions of 15-minute increment meter reads from Advanced Metering Infrastructure (AMI) to identify peaking factors, or developing sophisticated demand profiles, we help our clients make the most of their data. Our data-driven approach led by actual data scientists simplifies complex billing metrics, confirming that cost-of-service allocations are equitable, rate structures are legally defensible, and customer impacts are clearly understood.

CASE STUDIES

City of St. Petersburg, FL | Retail Rate Structure & Bill Frequency Evaluation

Scope of Work: To support the City's retail rate structure evaluation, Stantec performed a granular assessment of the City's utility billing system data over a full 12-month period. Our analysts developed detailed bill frequency analyses to accurately model the current demand profiles for each customer class by service type.

Outcomes

Precision Impact Modeling: By deeply understanding customer consumption patterns, we accurately determined the precise financial impacts that various alternative, revenue-neutral rate structure modifications would have on each customer class.

Targeted Mitigation Strategies: We leveraged the billing data to develop intuitive "heat maps" that visually identified specific customers and geographic areas that would be disproportionately affected by the rate structure changes, allowing the City to proactively address stakeholder concerns and reach out to large volume users.

City of Tempe, AZ | AMI Data Transformation and Visualization

Scope of Work: The City required advanced data management to unlock the value of its Automated Metering Infrastructure (AMI). Stantec was responsible for extracting massive volumes of water AMI data from a SQL server and transforming the raw volume readings into structured formats to facilitate downstream financial analyses. We then integrated this transformed billing data into an interactive business intelligence environment.

Outcomes

Advanced Analytical Dashboards: We successfully deployed a dynamic PowerBI dashboard that empowered utility staff to easily view and manipulate data.

Enhanced Customer Insights: The tool featured comprehensive tabs tracking general yearly and monthly water use trends, as well as an interactive, map-based search tool allowing users to seamlessly zoom in on specific customer accounts and visualize their individual water use behavior over time.

East Bay Municipal Utility District, CA | Billing Data Normalization & Demand Analysis

Scope of Work: Stantec led a comprehensive cost-of-service and rate design study involving detailed analysis of the District's bi-monthly billing data. To address masked peak usage, we developed advanced normalization methods to accurately estimate maximum month demand factors. Concurrently, we conducted a System Connection Charge study, performing extensive statistical analyses of water demand across the service area and evaluating key billing parameters to assess differences among customer groups.

Outcomes

Legally Defensible Tiered Rates: Our meticulous billing data analysis allowed the District to directly and diligently connect the cost of water service to its tiered rates, significantly strengthening their case for tiered pricing in light of strict Proposition 218 legal requirements.

Equitable System Connection Charges: The statistical demand analysis successfully refined demand estimates for every customer class and provided the empirical support needed to offer reduced charges for smaller multi-family housing units (under 500 square feet), promoting equity and affordability.

Financial Modeling, Forecasting, and Long-Term Financial Planning

True financial sustainability requires more than just looking at the bottom line—it demands dynamic, forward-looking strategies that can adapt to changing economic realities. Central to our approach is our **Financial Analysis & Management System (FAMS)**, a secure, cloud-based digital financial planning tool powered by thousands of studies for hundreds of municipalities. FAMS goes beyond the limitations of standard spreadsheets by offering real-time scenario modeling, capital funding optimization, and interactive visualizations that empower clear, confident decision-making.

CASE STUDIES

City of Fort Lauderdale, FL | Integrated Multi-Fund Financial Sustainability Modeling

Scope of Work: The City required a holistic approach to its long-term financial planning. Stantec developed an interconnected, 10-year financial sustainability modeling system covering the City's General Fund and seven distinct major enterprise funds, including Water/Sewer, Regional Wastewater, Stormwater, Sanitation, Airport, Parking, and Building funds. We customized individual financial models for each specific fund and seamlessly linked them into a common forecasting platform to simulate enterprise-wide impacts.

Outcomes

Real-Time Scenario Analysis: The interconnected platform enabled City management to instantly evaluate a wide variety of decision alternatives and understand their immediate and future financial consequences across all funds.

Targeted Sustainability Strategies: We successfully diagnosed the baseline financial condition of each fund, performed sensitivity analyses on key assumptions, and developed highly customized, fund-specific strategies to support long-term financial sustainability.

City of Tallahassee, FL | Custom FAMS Deployment & Capital Optimization

Scope of Work: Stantec deployed and highly customized our cloud-based FAMS models for the City's water and wastewater enterprise funds. We aligned the platform perfectly with the City's unique cash management practices, capital funding policies, and internal reporting requirements. The models were configured to automatically calculate internal and external inter-fund transfers and model complex scenarios, including multiple rate increases per year.

Outcomes

Agile CIP Execution: The built-in capital funding optimization allowed the City to evaluate numerous iterations of their Capital Improvement Plan (CIP), successfully navigating periods of high inflation and interest rate uncertainty.

Enhanced Financial Control: The City's utility financial managers use these customized models for real-time forecasting, seamlessly evaluating the addition of specific projects to the CIP and optimizing capital funding strategies.

City of Cape Coral, FL | Financial Forecasting & Massive Expansion Planning

Scope of Work: For over 15 years, Stantec has served as the City's trusted rate and financial consultant. To support an aggressive utility expansion program, we initially developed and now annually update a comprehensive 10-year utility financial management plan and revenue sufficiency analysis. Our financial forecasting accounts for updated capital spending levels, operating budgets, required debt service coverage, and strict reserve targets.

Outcomes

Securing Growth Capital: Our modeling successfully generated a detailed plan of finance to fund over $300 million in critical capital improvements and models the impacts of future system expansions for defined areas.

Strategic Cost Recovery: Leveraging the financial forecasts, we evaluated and structured alternative billing and collection methods for betterment fees and capital charges—ensuring growth-related costs were recovered equitably and in alignment with industry best practices.

Development and Implementation of Tariffs, Surcharges, and Rate Stabilization Strategies

Unpredictable weather patterns, rapid community growth, and inflationary pressures can wreak havoc on a utility's financial health. To combat this, utilities must deploy resilient, forward-thinking strategies. Stantec's advisory team excels in designing innovative tariffs, equitable surcharges, and robust rate stabilization mechanisms that protect your bottom line while remaining politically acceptable and fair to ratepayers.

CASE STUDIES

Hillsborough County, FL | Accrued Revenue Guarantee Fees & New Tariff Development

Scope of Work: To address financial pressures from rapid growth, Stantec conducted a comprehensive review of the County's Capacity Fees and Accrued Revenue Guarantee Fees. Our team performed regional benchmarking, assessed cost recovery, and completed a demonstrated needs analysis to support potential fee increases. We also evaluated options for a Reclaimed Water Service Availability Charge and updated Industrial Pre-treatment Charges and Fire Protection tariffs.

Outcomes:

Defensible Surcharge Adjustments: We navigated Florida's statutory constraints and legal precedent to provide a path to update its Accrued Revenue Guarantee Fees to cover the cost of maintaining capacity for future development.

New Revenue Streams: Our analysis of the Reclaimed Water Service Availability Charge provided the strategic framework needed to implement a new tariff supporting the expansion of the County's reclaimed water infrastructure.

New York City Department of Environmental Protection (NYC DEP), NY | Sustainable Tariffs & Resiliency Surcharges

Scope of Work: Stantec directed a highly complex Sustainable Rate Structure Analysis for the NYC DEP. Our team modeled the DEP's water, sewer, and stormwater revenue requirements over a 20-year period. We were tasked with evaluating alternative water and sewer rate structures and developed a new stormwater resiliency fee (surcharge) to support the City's management and capital improvements.

Outcomes

Innovative Tariff Design: We developed a dedicated stormwater charge based on the identified cost of providing stormwater and enhancing resilience, with consideration to customer impacts across a wide range of property uses.

Incentivized Rate Structures: Alongside the new tariff, we designed an implementation plan that included a "green credit program" to financially incentivize customers to adopt green infrastructure, seamlessly blending utility revenue stability with long-term environmental sustainability goals.

City of Cape Coral, FL | Betterment Fees, Surcharges & Capital Cost Recovery

Scope of Work: Serving as the City's rate consultant for over 15 years, one specific engagement was a comprehensive "betterment fee" analysis, where our experts reviewed various surcharge mechanisms to recover capital costs associated with localized water, sewer, and irrigation infrastructure outside of assessment areas. We analyzed existing special assessments for local distribution systems, considered the structure of other fees imposed on new development, and ultimately developed betterment fees to be applied to infill development.

Outcomes:

Optimized Surcharge Implementation: We successfully evaluated and structured alternative billing and collection methods for betterment fees and developed and approach for future updates to address changes in capital costs.

Equitable Growth Funding: The implemented strategies ensured that these capital cost charges were seamlessly integrated, consistent with accepted industry practices, and properly aligned with the utility's broader tariff framework.

Developer Services Assessment and Implementation

Community growth requires a delicate balance: facilitating economic development while requiring that "growth pays for growth." Our team excels in designing and implementing comprehensive developer services processes, from application intake and fee collection to plan review, permitting, and final asset acceptance. We specialize in structuring equitable cost-recovery mechanisms, capacity charges, and developer agreements that protect utility ratepayers while maintaining transparent, efficient workflows for the development community.

CASE STUDIES

Toho Water Authority, FL | Developer Services, Contributions in Aid of Construction (CIAC), & Extension Programs

Scope of Work: To support rapid growth, Stantec developed a comprehensive policy and cost-recovery framework for Toho's utility main extension program and CIAC fees, addressing both Authority- and Builder-installed services for unserved platted lots. Acting as an extension of Toho's staff, we provided program management, GIS mapping, project prioritization, developer coordination, and stakeholder outreach, and evaluated alternative fee options to strengthen future system expansion policies.

Outcomes:

Streamlined Developer Workflow: We successfully guided the approach and implemented new tracking tools for staff to easily monitor properties subject to CIAC charges, seamlessly integrating these new processes into Toho's existing teams and systems.

Balanced Stakeholder Interests: The finalized developer services program effectively balanced and protected the diverse interests of the development community, homeowners, local government, the environment, and the utility.

City of Palm Bay, FL | Impact Fees & Developer Agreement Modeling

Scope of Work: As the City's utility financial consultant, Stantec led a comprehensive water and wastewater impact fee study, evaluating existing methodologies and their application to new growth. We modeled the financial impacts of proposed developer agreements to protect the City and assisted in developing special assessments for water, wastewater, and road service extensions.

Outcomes:

Financially Sound Developer Agreements: Our advanced modeling provided City leadership with the data-driven insights needed to negotiate and execute developer agreements that were financially sustainable and aligned with long-term utility goals.

Optimized Cost Recovery: The updated impact fee methodology and new special assessment structures successfully captured the true cost of extending services, supporting equitable recovery of development-related infrastructure costs.

Hillsborough County, FL | System Expansion & Developer Fee Analysis

Scope of Work: To address growth pressures, Stantec performed a System Expansion Funding Analysis to evaluate extending localized water and wastewater infrastructure into unserved areas. We benchmarked funding approaches from high-growth utilities across the country and applied them to sample areas using County cost data.

Outcomes:

Strategic Expansion Roadmaps: By analyzing sample development areas, we successfully provided the County with clear, data-backed models showing the exact financial impacts that various infrastructure expansion strategies would have on the utility, existing ratepayers, and new system connections.

Defensible Options: We successfully navigated Florida's legal environment to provide the County with an understanding of options for cost recovery and their consequences to support transparent communications and enhanced decision-making by County leadership.

Large Users and Wholesale Customers

We recognize the unique complexities that come with delivering large volumes of water and wastewater services through extensive infrastructure to key wholesale customers and high-demand users. Navigating these relationships requires a delicate balance of technical precision, legal defensibility, and contextual understanding. Our team excels in developing customized cost-of-service allocations, drafting specialized wholesale service proposals, modernizing interlocal agreements, and providing expert litigation support. By deeply understanding the technical drivers—such as system capacity, peaking factors, and wastewater loading characteristics—we support wholesale pricing strategies that are equitable, transparent, and built to foster long-term collaboration.

CASE STUDIES

Hillsborough County, FL | Interlocal Wholesale Agreement Modernization

Scope of Work: Stantec evaluated an interlocal agreement between Hillsborough County and the City of Tampa governing wholesale water and wastewater rates. We developed a cost allocation model to calculate and compare wholesale rates using data, agreement terms, benchmarks, and industry best practices.

Outcomes:

Data-Driven Issue Resolution: We successfully identified discrepancies between the historical agreement guidelines and the recent rates charged to the County and opportunities to better align the agreement with industry practices.

Strategic Negotiation Support: We provided County leadership with three actionable paths to modernize the outdated agreement and providing fair, equitable cost recovery between both entities.

City of St. Petersburg, FL | Wholesale Rate Design & Litigation Support

Scope of Work: As the City's trusted financial consultant for nearly 20 years, Stantec has prepared multi-year financial plans with detailed cost-of-service allocations for retail and wholesale customers. Our services include evaluating rate structures, designing wholesale rate adjustments, and providing expert testimony to defend wholesale rates.

Outcomes:

Unassailable Rate Equity: We successfully established detailed cost allocations that support fair and equitable wholesale rates strictly conforming to accepted industry practices and legal precedents.

Successful Legal Defense: By leveraging our granular data analysis and industry expertise, Stantec provided the critical litigation support the City needed to successfully defend and maintain its wholesale rate structures.

Pinellas County, FL | Wholesale Water Agreement & Acquisition Strategy

Scope of Work: Stantec worked with Pinellas County and the Town of Belleair to evaluate two strategic options: County acquisition of the Town's water system assets or provision of wholesale water service. Our analysis included a review of historical operating revenues, future capital needs, and regulatory requirements.

Outcomes:

Strategic Clarity: Our objective, data-driven financial assessment provided the precise clarity the Town of Belleair needed to confidently choose the wholesale water alternative over an asset buyout.

Seamless Contract Execution: Following the decision, Stantec successfully developed and structured the formal Agreement allowing Pinellas County to initiate and provide long-term wholesale water service to the Town.

City of San Diego, CA | Metro Wastewater JPA Cost Allocation & Strength-Based Billing

Scope of Work: Stantec is leading development of a complex cost allocation and strength-based billing framework for the City's Metro wastewater system, serving 15 member agencies through a Joint Powers Authority. Our team evaluated key cost drivers and alternative rate structures to better align cost recovery with service demands.

Outcomes:

Equitable Regional Collaboration: Stantec's advanced cost allocation models are modernizing a longstanding regional service agreement, ensuring transparent and equitable cost recovery across participating agencies.

Future-Ready Billing Models: The new framework seamlessly accommodates the drastically changing usage and capacity characteristics of the system, supporting the City's commitment to resilient, performance-based billing models.

Revenue Bond Issuance Support and Debt Financing Mechanisms for Capital Projects

Finding the most efficient way to fund critical capital projects is where true financial sustainability is achieved. Our team has supported the issuance of over $6 billion in municipal debt in the last five years alone. We de-mystify the complex financing process by seamlessly guiding utilities through bond feasibility analyses, WIFIA loan applications, and State Revolving Fund (SRF) loan assistance. We work strictly for you—not the banks—collaborating with your staff and Financial Advisors to evaluate the impacts of all possible financing solutions. Furthermore, we regularly work with major credit rating agencies, allowing alignment our financial management plans with the most current rating methodologies and metrics to secure the lowest possible borrowing costs.

CASE STUDIES

Okaloosa County, FL | Water and Sewer Revenue Bond Feasibility Study

Scope of Work: Developed a five-year financial forecast and conducted a Bond Feasibility Study. This involved modeling alternative capital funding scenarios and determining the level of annual water and sewer rate adjustments.

Outcomes:

Successful Bond Issuance: Directly supported the successful issuance of the County's Series 2015 Water and Sewer Revenue Refunding Bond, yielding approximately $67.6 million in proceeds.

Optimized Capital Financing: Determined the optimal capital financing plan for the County. The analysis served as the foundational basis for feasibility recommendations, which were incorporated into the Engineering Report and appended to the final Series 2015 Official Statement.

City of Fort Lauderdale, FL | Revenue Bond Issuance & Rating Agency Strategy

Scope of Work: As the City's financial consultant since 2008, Stantec provides ongoing financial planning and direct support for the issuance of municipal bonds. Our scope of work routinely includes preparing customized financial forecasts, assessing debt coverage ratios, and presentations to major credit rating agencies.

Outcomes:

Successful Capital Financing: We provided the critical financial modeling and feasibility support required for the successful issuance of approximately a) $210 million for 2023 Stormwater Bonds and $540 million for Water and Sewer Bonds, and b) $330 million for 2026 Stormwater Bonds, which were essential to funding necessary system improvements in light of recent historic rainfall events.

Maintained Credit Excellence: Because our data-driven recommendations are consistently implemented, the City's utility has successfully maintained a very good credit rating, allowing them to secure favorable debt terms while keeping annual rate adjustments moderate.

City of Fort Myers, FL | Revenue Sufficiency Analysis & Bond Feasibility Report

Scope of Work: Serving as the City's rate consultant for over 25 years, Stantec utilized our Financial Analysis & Management System (FAMS) to model and optimize the City's debt financing strategies. We recently led the City's FY23 Revenue Sufficiency Analysis Update and prepared the official Bond Financial Feasibility Report.

Outcomes:

Funding Massive Growth: Our advanced financial modeling provided a highly defensible framework that successfully secured financing for over $105 million in critical capital improvements.

Accelerated Project Delivery: By evaluating numerous scenarios of capital spending and reserve targets, we assisted the City in accelerating large, critical infrastructure projects using bank loans and bonds, rather than relying solely on cash funding, thereby equitably spreading the costs of new assets over the useful lives of the assets.

Development and Implementation of Low-Income Equity-Based Assistance Programs

True utility sustainability means balancing financial health with ratepayer affordability. Access to consistent and affordable utilities is critical for maintaining health, safety, and overall well-being. For low-income and fixed-income families, utility rate stability is a necessity, not a convenience. Our team leads the industry to develop equitable, data-driven customer assistance programs (CAPs) and innovative rate structures. Utilizing our proprietary Weighted Average Residential Index (WARi™), we can accurately pinpoint affordability issues across different neighborhoods and income levels, empowering utilities to set fair fees, mitigate financial burdens, and protect their most vulnerable populations.

CASE STUDIES

Toho Water Authority, FL | Affordability Program Assessment & CAP Implementation

Scope of Work: Toho Water Authority engaged Stantec to complete an Affordability Program Assessment for its 160,000 customers. We evaluated potential Customer Assistance Program frameworks and analyzed bill affordability using multiple performance indicators. Our assessment also addressed broader cost-of-living impacts, including deposits, fees, and charges affecting affordable housing, and identified at-risk areas, participation levels, and potential revenue impacts under various program scenarios.

Outcomes:

Targeted Equity Framework: We successfully developed a customized CAP framework that directly met the Authority's goals of improving water and sewer bill affordability for low-income populations.

Turnkey Implementation: Acting as an extension of their team, we worked directly with Toho's business services division to identify and establish the exact workflows, internal processes, and documentation required to seamlessly launch and administer the recommended assistance programs.

Revenue Protection: The finalized programs were expertly structured to allow vulnerable customers to receive relief, while the utility continued to generate sufficient overall revenue to maintain financial stability.

City of North Miami, FL | EPA Community Change Grant

Scope of Work: Stantec led the development of a major funding proposal aimed at reducing pollution and increasing climate resilience within disadvantaged communities in the City of North Miami.

Outcomes:

Securing Equity-Focused Funding: Our strategic funding expertise successfully delivered a $20 million grant proposal targeting a 27-acre mixed-use development serving a predominantly Haitian community. The project successfully integrated brownfield redevelopment, energy-efficiency retrofits, and neighborhood-scale resilience hubs designed to directly benefit low-income residents.

State Water Resources Control Board, CA | SAFER Administrator & Technical Assistance Program

Scope of Work: The State of California selected Stantec as an Administrator and Technical Assistance Provider for the multi-billion-dollar SAFER program, advancing the human right to water statewide. Across assignments totaling approximately $36 million, Stantec provides full-scope water system administration and technical assistance to disadvantaged, rural communities, including evaluating system consolidations, strengthening financial practices, and aligning technical solutions with long-term financial viability.

Outcomes:

Empowering Disadvantaged Communities: Our culturally responsive, community-informed planning successfully aligns water system improvements with broader social equity, health, and environmental goals for vulnerable populations.

Self-Sustaining Success: Through the education of local boards, the formation of accountability frameworks, and capacity-building initiatives, we ensure these systems return to compliance and are positioned for long-term, equitable success.

Organizational Assessments and Implementation Strategies for Municipal Utilities

Transforming a utility requires more than just upgrading technology or improving infrastructure — it requires a fundamental realignment of the organization. We recognize that successful, transformational change is built on 10% technology, 30% processes, and 60% people. Our Strategic Planning and Implementation team leverages industry-leading models, such as the Effective Utility Management (EUM) framework, to deliver systematic, transparent, and adaptive organizational assessments.

Central to our approach is structured Organizational Change Management (OCM) grounded in the Prosci 3-Phase Process and ADKAR® Model — a research-based methodology focused on driving individual and organizational change through Awareness, Desire, Knowledge, Ability, and Reinforcement. Our Prosci-certified practitioners bring the discipline and tools needed to accelerate adoption, reduce resistance, and sustain change long after implementation.

Complementing this, our process management team is anchored in the APQC Process Classification Framework (PCF), a globally recognized standard for benchmarking and improving business processes. Led by our APQC Certified Team, we help utilities define, document, and optimize processes to drive operational efficiency and repeatable performance. Whether we are addressing succession planning, developing Key Performance Indicators (KPIs), or mapping out workforce realignments to support system expansions, we help utilities build the internal capacity required to become industry leaders.

Figure 8. Phases of Organizational Change Management.

CASE STUDIES

City of Portland, OR | One Water Feasibility Study & Governance Roadmap

Scope of Work: In response to a voter-mandated citywide governance transition and organizational restructuring, the City engaged Stantec to bring its expertise in organizational governance, change management, and integrated utility planning. We collaborated with City staff to conduct a comprehensive current-state assessment focusing on leadership development, organizational effectiveness, and infrastructure strategy. The goal was to evaluate the feasibility of moving to a "One Water" framework that integrates all components of the urban water cycle.

Outcomes:

Actionable Strategic Vision: Stantec successfully delivered a phased implementation roadmap for standing up a new, One Water-aligned Public Works Service Area.

Transformational Restructuring: The outcomes promoted cross-departmental collaboration, system-wide alignment of operations, and positioned the City to serve as a national leader in integrated public service delivery.

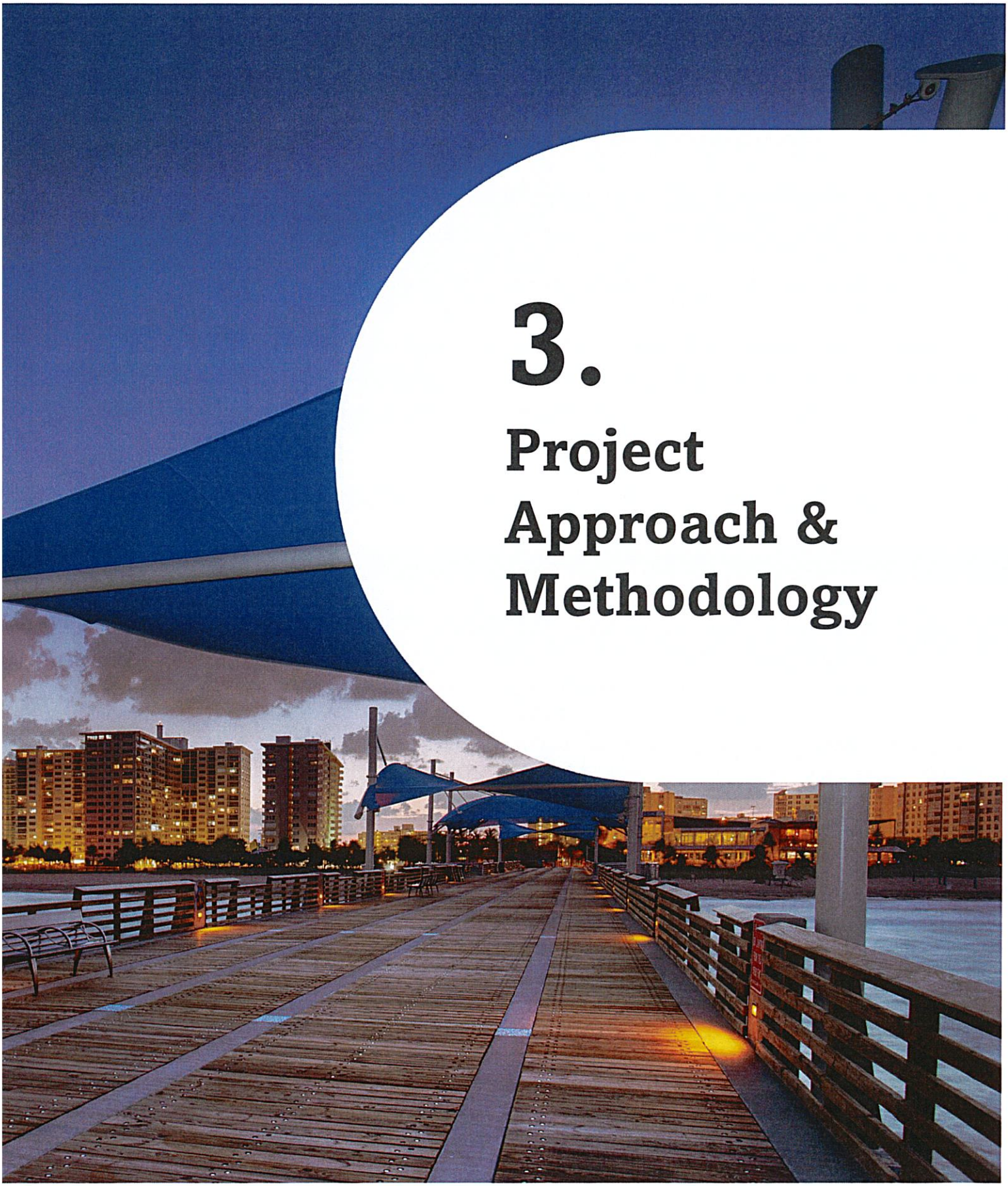
Toho Water Authority, FL | Organizational Assessment & KPI Development

Scope of Work: Stantec conducted targeted organizational assessments for the Authority, with a focused review of the Environmental Compliance Division. We also interviewed staff across Finance, Field Services, Operations, and Administration and deployed a custom survey to collect benchmarking data and compare performance against industry peers for all departments.

Outcomes:

Strategic Action Roadmap: We consolidated the assessment findings and presented executive leadership with a comprehensive action item roadmap outlining specific improvement recommendations for workforce, communication, technology, and performance management.

Performance Tracking: We developed and deployed a custom Key Performance Indicator (KPI) tracking tool, allowing the Authority to accurately monitor and report on its ongoing performance.



3.

Project Approach & Methodology

Project Understanding

Our understanding is that this solicitation will result in a Service Agreement for an initial term of five (5) years, that will result in work authorizations to perform various assignments as described in the RFP's Scope of Services.

The primary objective of the City of Pompano Beach is to meet long-term strategic goals and level of service objectives while maintaining efficient and cost-effective service delivery. To achieve this, the City intends to utilize consulting expertise to maximize financial performance, support organizational growth, and secure long-term sustainability for its utility systems.

Unique Challenges

To achieve its strategic objectives, the City must overcome several critical and interconnected **challenges**:

- **Severe Funding Gaps and High Debt Reliance:** The Utility faces a $100+ million Capital Improvement Plan (CIP) funding gap based on its current draft master plan, with ~80% of capital funded by debt, limiting flexibility and burdening future ratepayers.
- **Critical Infrastructure Vulnerability:** Severe underinvestment in asset renewal (a historical $55 million gap for FY20-24 and a projected $100+ million gap for FY25-31) has increased the frequency of infrastructure failures, such as water main breaks and sewer overflows.
- **Outdated Capital Fees and Absence of Developer Agreement:** Capacity fees are outdated and below peer averages, and a lack of formal developer agreements prevents new developments from properly funding localized infrastructure and contribute to capacity costs.
- **General Fund Risks:** The utility lacks defined policies that set the framework for the transfer of utility revenues to the City's General Fund. This creates legal and regulatory vulnerability, as expenditures outside direct cost-recovery and impact concepts may be inconsistent with federal and Florida legal standards as well as industry practices.
- **Workforce and Infrastructure Capacity Gaps:** A lean executive structure and the absence of a dedicated utilities-focused infrastructure engineering division have resulted in approximately $60 million in capital managed per FTE, nearly four times the average of peer systems. Coupled with limited comprehensive master planning, project prioritization, and technical analysis, this has contributed to reactive and inefficient decision-making, reduced coordination across projects, staff burnout, cost overruns, and schedule delays.
- **Underutilized Reclaimed Water:** The reclaimed water system is underutilized and underfunded due to a lack of a mandatory connection policy.
- **Wholesale and Outside-City Cost Recovery:** Providing services to wholesale and retail customers outside city boundaries, such as Lauderdale-by-the-Sea and Lighthouse Point, creates complex challenges in calculating accurate annual true-ups and maintaining full cost recovery for operations and capital improvements.
- **Aging Assets:** The City faces the specific burden of managing and planning for the replacement of aging utility assets, including those located entirely outside of its municipal boundaries.
- **Customer Affordability and Equity:** As the City navigates severe funding gaps and rate adjustments, it faces the challenge of providing service that remains affordable for low-income and fixed-income populations.

Desired Outcomes

Through the scope of services in this RFP, we will incorporate the strategies on the road map developed in the recent independent review to help the City achieve the following outcomes:

- **Long-Term Financial Feasibility:** The delivery of a dynamic, Excel-based, user-friendly financial and rate model with instructions spanning 5, 10, 15, and 20-year horizons to scenario-test capital improvement priorities, inflation impacts, and debt affordability.
- **Achieve Financial Stability and Liquidity:** Implement standard base charges, remove wastewater caps, and adjust financial policies to generate $4–5 million of annual revenue while targeting a 50% reserve.
- **Reduce Debt Reliance & Modernize Development Services:** We will help the City cash-fund a larger portion of the CIP by assessing development-related fees, identifying grant funding opportunities, setting cash-funding targets, and delivering standardized developer agreement templates.
- **Provide Regulatory Defensibility and Compliance:** Clear policies on General Fund allocations will result in user fees that are legally compliant and comport with AWWA guidelines and GASB requirements.
- **Capital Surcharges & Customer Affordability:** The implementation of restricted-use capital improvement surcharges dedicated to aging assets, alongside the design of targeted low-income and fixed-income assistance programs, to stabilize and sustain both capital funding and affordability.
- **Strengthen Organizational Capacity:** Align the Utilities Department's organizational structure, staffing, and performance metrics with current and future operational, financial, and regulatory demands, supporting effective implementation of recommended policies and strategies.

Project Management Approach

Stantec's Project Management Framework

At Stantec, we recognize that exemplary consulting requires more than just technical expertise; it requires the vision and discipline to make progress happen. Project management is a core competency of our team, driven by a proven track record of delivering highly successful rate, financial, and organizational services to similar municipalities and complex utility providers. Guided by our rigorous, ISO 9001-compliant Project Management Framework, we systematically control every assignment through four critical stages: Initiate, Plan, Control, and Close-Out.

Led by Project Manager Andrew Burnham and Deputy Project Managers Hani Alkhouli and Junaid Rahman, our approach supports our goal to have every project meticulously defined, appropriately staffed, and strictly monitored. For every Work Authorization, we assign a dedicated project manager who serves as your singular, highly responsive point of contact. To provide absolute financial transparency and budget control, our leadership accesses the Oracle Project Management Dashboard on a weekly basis to track time, project costs, and work in progress, guaranteeing that all authorized work is completed within the agreed-upon budget.

Stantec's Project Management Framework	
0	Prepare a proposal that includes a preliminary Project Plan including scope, project budget, resources, deliverables, and schedule. Conduct and document an independent review of the final proposal, as required.
1	Obtain written instructions to proceed and obtain an approved contract with the client. Obtain written agreements for subs (third party providers).
2	Prepare a Project Plan to an appropriate level of detail. Conduct and document an independent review as required.
3	Establish hard copy and/or electronic project record directories and file project records accordingly.
4	Complete a Health, Safety, Security & Environment (HSSE) risk management assessment and documents for all proposals and projects involving field work.
5	Monitor the project financials on a regular basis, including weekly time charges, timely invoicing, accounts receivable (AR), and estimates to complete.
6	Promptly communicate changes to agreed services to the client and obtain required written approvals in a timely manner.
7	Conduct and document a quality review of final deliverables prior to issue.
8	Conduct and document a technical independent review of final deliverables prior to issue.
9	Close the project financials and files.

Figure 17. Process of Stantec's Project Management Framework.

Timeline and Schedule Management

Proactive scheduling is the foundation of our timely delivery. Within two weeks of a work authorization, our project management team will submit a detailed project plan and timeline. We collaboratively develop our schedules using platforms like MS Planner to establish clear tasks, dependencies, and key milestones, ensuring all stakeholders are aligned. Our technology provides real-time schedule updates, giving the City continuous, transparent access to project progress. While customized to your exact needs, a typical utility rate study timeline capitalizes on the local government fiscal year (October–September): we strategically initiate studies around January and drive toward early summer completion, perfectly timing the presentation and adoption of updated rates for your budget process.

Deliverables and Quality Assurance

Our commitment is to deliver impeccably accurate financial models, organizational assessments, and reports to the complete satisfaction of the City. Every deliverable begins with a detailed, assignment-specific scope of work outlining staffing, hourly rates, and estimated expenses.

We differentiate ourselves through an uncompromising, proactive Quality Control (QA/QC) program spearheaded by our Quality Control Reviewer, Eric Grau. Our deliverables workflow includes:

- **Comprehensive Internal Reviews:** Identifying and mitigating potential risks and errors before they arise.
- **Preliminary Result Validation:** Iteratively reviewing and adjusting financial models and fee calculations internally prior to holding interactive review sessions with City staff.

- **Final Submissions:** Issuing electronic and hard-copy deliverables backed by rigorous data validation, reviews, and verifiable documentation.

Implementation, Training, and Long-Term Support

Our commitment to the City of Pompano Beach extends far beyond the final submission of our electronic or hard-copy deliverables. We understand that the true value of a financial model or organizational assessment lies in its execution. To support seamless transitions and operational success, our team will provide comprehensive training and hands-on support to City staff so that they are fully equipped to implement all recommendations. Furthermore, as your dedicated long-term partner, our experts will remain readily available for ongoing follow-up consultations and support whenever the City needs us.

Communication Tools and Public Engagement Support

Stantec recognizes that the success of each project hinges on our ability to communicate effectively and collaborate seamlessly with the City of Pompano Beach. Financial planning, rate-making, and organizational restructuring are inherently complex and often face resistance if stakeholders are not properly engaged. To support successful adoption, our approach integrates the Effective Utility Management (EUM) framework with the Prosci ADKAR® Model and APQC Change Management tenets to drive transparent, two-way communication.

Internal Collaboration and Cross-Functional Alignment

Meaningful organizational change requires active and visible sponsorship. We will work closely with the City's designated Project Manager and establish a strong Sponsor Coalition. Because projects under this RFP have the potential to impact multiple facets of the City's operations, we will facilitate structured, cross-departmental collaboration involving Administration, Budget/Finance, Engineering, Planning & Zoning, and Legal.

To guide internal transitions—such as the implementation of new development service processes, fee structures, and organizational realignments—we apply the Prosci ADKAR® Model (Awareness, Desire, Knowledge, Ability, Reinforcement). By helping all internal stakeholders understand the *Awareness* of why changes are needed and the *Desire* to participate (answering the "What's in it for me?" or WIIFM), we foster employee buy-in, reduce resistance, and enables a smooth transfer of knowledge and assets.

External Stakeholder and Public Engagement

When introducing new utility rate structures, fees, surcharges, or customer assistance programs, gaining the trust of external stakeholders—including private entities and the general public—is critical. Aligned with the EUM attribute of Stakeholder Understanding and Support, our engagement strategy actively promotes an appreciation of the true value of water services and their role in the social, economic, and environmental health of Pompano Beach. To facilitate this, we translate complex financial modeling and cost-of-service analyses into transparent, easily digestible formats. We will equip the City with robust communication tools, including:

- Intuitive, Excel-based financial and rate models.
- Clear visual aids and dashboard visualizations illustrating rate impacts and financial trends.
- Policy briefs, executive summaries, and presentation materials tailored for the City Commission and diverse stakeholder groups.
- Materials specifically designed for public workshops to foster community dialogue.

Two-Way Communication and Continuous Feedback

Effective change management is rooted in engagement and consistent, two-way communication. Our methodology goes beyond simply pushing information out; we actively consult with stakeholders and measure stakeholder satisfaction. By incorporating feedback mechanisms into our public workshops and executive presentations, we align final utility rates, organizational recommendations, and equity-based assistance programs with community expectations, prioritize affordability, and align with the City's strategic objectives.

Methodology and Technical Approach

Revenue Sufficiency Analysis

Our team will execute a comprehensive methodology to develop a multi-year financial feasibility analysis that spans 5, 10, 15, and 20-year planning horizons, fully integrating the City of Pompano Beach's operational, capital, and financial policy requirements. Our approach is designed to provide customized solutions, leverage advanced data analysis techniques, and provide clear communication with City stakeholders. Our team will conduct the following tasks:

Task 1: Baseline Financial Modeling and Forecasting

We will develop a user-friendly, Excel-based revenue requirement and rate projection model. This model will focus on detailed 5- and 10-year rate projections, while also providing interim projections that extend to the 15- and 20-year horizons. To build this baseline, we will comprehensively forecast all critical financial elements, including operating expenses, capital funding needs, cost recovery, and reserve requirements.

Task 2: Scenario Modeling and Capital Financing Strategy

A core component of our technical approach is dynamic scenario modeling to assess key variables and optimize capital financing. We will evaluate multiple capital financing strategies, specifically analyzing the cost-benefits of debt issuance versus pay-as-you-go funding. Our scenarios will be built to assess variables including:

- Capital Replacement Plan (CRP) impacts.
- Capital Improvement Plan (CIP) timing and prioritization alternatives.
- Regulatory compliance cost impacts.
- Debt issuance timing, structure, and overall affordability.

Task 3: Risk Evaluation and Sensitivity Analysis

To strengthen the City's financial resilience against future uncertainties, we will conduct rigorous sensitivity analyses within the model. This will allow the City to proactively evaluate financial risks related to potential demand fluctuations, inflation rates, and future growth assumptions.

Task 4: Policy Integration and Rate Identification

Our methodology is designed so that the City's specific financial policies are hardcoded into the modeling process. We will integrate exact financial policies, including necessary reserve targets and debt service coverage requirements. Utilizing these integrated metrics, we will identify the precise rate adjustments required to maintain long-term financial sustainability and achieve policy compliance.

Task 5: Ongoing Model Updates and Strategic Alignment

Our engagement does not end with the delivery of a static model. We are able to provide semi-annual updates to the financial projection model during the study period. Furthermore, we will review and update all fundamental assumptions at least annually so the model remains aligned with the City's evolving priorities, such as shifts in capital improvement needs, system demand changes, or new regulatory requirements.

Task 6: Stakeholder Engagement and Communication

Recognizing that a successful project requires internal and external consensus, our project management approach prioritizes collaboration with City staff, Administration, Budget, Finance, and the public. We will translate complex modeling data into highly accessible formats by providing visual aids that illustrate impacts, rationale for changes, and industry trends, as well as draft policy briefs and lead presentations for the City Commission and other stakeholder groups.

Revenue Sufficiency Analysis Summary	
Timeline	4 – 6 months
Deliverables	• Multi-year financial plan and rate model • Revenue sufficiency analysis report • Interim rate structure update, recommendations, and comparisons • Ordinance and policy review and updating assistance • Dashboard visualizations and presentation materials.
Communication Tools & Public Engagement Support	• Excel-based, user-friendly financial and rate model with instructions • Visual aids illustrating rate impacts, financial trends, and policy options • Policy briefs and executive summaries • Public workshop materials and presentations • Updates to ordinances, resolutions, and policies necessary to implement recommendations. • Presentations to City Commission and stakeholder groups • Coordination and collaboration with various internal and external stakeholders, including Administration, Budget, Finance, Engineering, Planning & Zoning, Legal, Private Entities, and the Public.

Financial Policy Development

Our approach to developing and updating the City's financial policies supports long-term fiscal stability, regulatory compliance, and effective capital funding strategies. Our methodology is organized into four tasks:

Task 1: Current State Assessment and Benchmarking

We will first conduct a comprehensive review and evaluation of the City's existing financial policies.

- **Policy Review:** We will analyze current targets for debt service coverage ratios, minimum and target working capital/cash balances, and established policies for Operating, Debt, Renewal & Replacement, and Emergency reserves. We will also evaluate the current allocation and differentiation policies regarding contributions to the City's general fund versus Utilities operating, capital, and reserve funds.
- **Benchmarking Analysis:** To confirm the City's policies align with industry practices, we will perform a benchmarking analysis comparing the City's reserve levels and financial policies against peer utilities.

Task 2: Strategic Policy Design and Formulation

Leveraging the insights gained from Task 1, we will formulate customized policy recommendations that reflect current industry trends and the specific needs of Pompano Beach's utility system.

- **Capital Financing Strategy:** We will develop a robust capital financing strategy that strategically balances debt, pay-as-you-go (pay-go) funding, and alternative funding mechanisms, including grants, State Revolving Funds (SRF), WIFIA, and other federal or state funding sources.
- **Outside-City Surcharge Implementation:** A dedicated sub-task will be the design and implementation of a capital improvement surcharge specifically for customers outside the city boundaries. We will structure this surcharge so that proceeds are strictly restricted for use in capital planning and replacing aging assets in those external service areas.
- **Regulatory Compliance:** All recommended policy updates will be reviewed to support compliance with American Water Works Association (AWWA) guidelines and Governmental Accounting Standards Board (GASB) requirements.

Task 3: Financial Feasibility and Debt Issuance Support

We will provide hands-on financial feasibility support to execute the City's capital funding strategies.

- **Feasibility Reporting:** We will prepare comprehensive financial feasibility reports required to support the issuance of revenue bonds or the securing of other debt financing for major operational and capital programs.
- **Rating Agency and Investor Presentations:** Our team will prepare materials for, and actively attend, presentations before rating agencies, bond insurance companies, potential investors, and purchasers of debt instruments to advocate for the City's financial strength.
- **Loan Documentation Advisory:** We will provide financial (non-legal) advisory services to assist the City in preparing and reviewing loan documents for funding agencies, including the Florida Department of Environmental Protection (FDEP), banks, and other lending institutions.

Task 4: Stakeholder Engagement, Documentation, and Implementation

Successful policy adoption requires clear communication and stakeholder alignment.

- **Deliverables:** We will provide clear documentation of all updated financial policies and procedures, alongside benchmarking reports and updated ordinances or resolutions necessary to implement the recommendations.
- **Collaboration and Presentation:** We will develop user-friendly policy briefs, executive summaries, and visual aids that illustrate trends and policy options. Our Project Manager and key personnel will coordinate with Administration, Budget, Finance, Legal, and other internal stakeholders, and deliver presentations to the City Commission and public stakeholder groups to support transparency and final policy adoption.

Financial Policy Development Summary	
Timeline	3 – 6 months
Deliverables	• Updated financial policies and procedures (reserves, debt coverage, allocations). • Benchmarking report comparing policies to peer utilities. • Financial feasibility reports in support of revenue bonds/debt financing. • Implemented capital improvement surcharge framework.
Communication Tools & Public Engagement Support	• Policy briefs and executive summaries • Public workshop materials and presentations • Provide updates to ordinances, resolutions, and policies necessary to implement recommendations. • Presentations to City Commission and stakeholder groups • Coordination and collaboration with various internal and external stakeholders, including Administration, Budget, Finance, Engineering, Planning & Zoning, Legal, Private Entities, and the Public as needed.

Rate Structure Analysis

Our technical approach to the Rate Structure Analysis is designed to support affordability, proportionality, transparency, and alignment with the City of Pompano Beach's objectives. Our methodology relies on advanced data analytics, customized modeling, and proactive stakeholder engagement to deliver a robust and equitable rate framework. In addition to the foundational tasks our team will conduct the following tasks:

Task 1: Data Integration and Baseline Consumption Analysis

- **Data Aggregation and GIS Alignment:** We will begin with GIS integration to align parcel data, customer classes, and service areas, verifying that all geographic and demographic parameters are accurately mapped.
- **Usage Profiling:** We will conduct a detailed review of existing customer class usage and a comprehensive consumption pattern analysis to build a baseline for Florida-specific rate recommendations.

Task 2: Evaluation of Existing Rate Components

- **Revenue Stability:** We will critically evaluate the balance between fixed and volumetric charges to strengthen financial resilience against demand fluctuations and identify the types of costs recovered in each.
- **Conservation Initiatives:** We will review current tier structures and inclining block methodologies, optimizing them to promote water conservation while meeting revenue requirements and considering cost of service.
- **Benchmarking:** To align with industry standards, we will perform a benchmarking analysis for rate structure comparisons, specifically examining fixed and volumetric fees, tier counts, block sizes, and pricing.

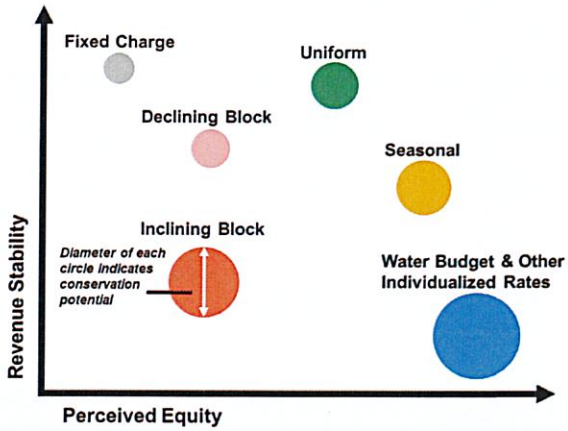


Figure 9. Rate design considerations.

Task 3: Specialized Cost Allocation and Interlocal Agreements

- **Boundary Municipality Surcharges:** We will evaluate and develop a customized approach for surcharges levied on boundary municipalities for capital improvement expenses attributable to their systems.
- **True-Up Calculations:** Our team will review and analyze the annual Lauderdale-by-the-Sea true-up calculations to provide full and fair cost recovery for both current operations and future capital expenditures.
- **Large User and Pass-Through Agreements:** We will advise on structuring large user and service contracts, specifically including the Broward County Wastewater Agreement and the Lighthouse Point Reuse Agreement, to support long-term cost recovery and equitable terms.

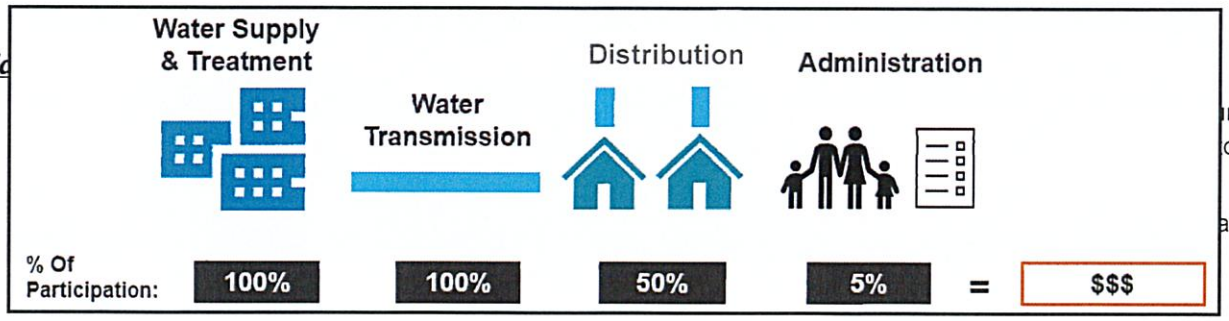


Figure 10. Example wholesale water cost allocation process.

Task 5: Water and Wastewater Cost of Service Analysis

- **Cost Functionalization and Allocation:** We will perform an in-depth cost of service analysis to determine the cost of providing water and wastewater services for each of the various classes of customers served by the City (e.g., residential, multi-family, commercial, and wholesale). The total cost of service and revenue requirements for each utility service will be functionalized to defined categories, which are then allocated to each class of customer based upon their specific characteristics or units of service.
- **Industry-Accepted Methodologies:** We will identify the most appropriate industry-accepted cost of service allocation methodologies, specifically utilizing those defined by the American Water Works Association (AWWA) and the Water Environment Federation (WEF). We will customize the cost of service model to employ the methodologies and concepts best suited for the City, building upon your existing approaches while factoring in your unique system configuration, resources, customer base, demand patterns, and public policy objectives.

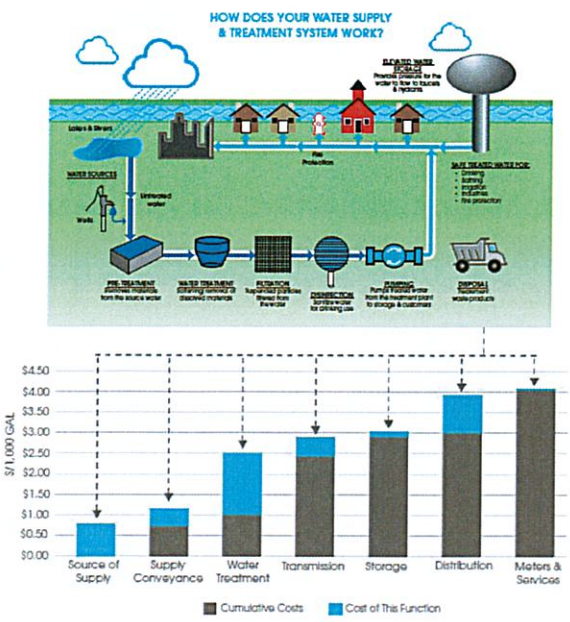


Figure 11. Cost of service analysis.

- **Revenue Recovery Evaluation:** At the conclusion of the cost of service analysis, we will compare the resulting allocation of revenue requirements to the revenue generated by the current rates for each customer class segment of the utility. To the extent current revenue recovery levels are not in line with the results of the cost of service allocation analysis, we will evaluate alternative levels of revenue recovery by class and segment of customer within the rate structure analysis that would better comport with the identified cost of service allocations.

Task 6: Stormwater Cost of Service Analysis

- **Fee Structure Basis and Parcel Characteristics:** We will gather and review available data to evaluate the City's current stormwater fee structure and determine if an alternate fee basis may be appropriate. To provide a fair and equitable allocation of system costs, we will analyze various parcel characteristics across the City's customer base, such as impervious area, pervious area, and gross area, to identify the benefits of modifying the current fee basis.
- **Cost Allocation and Fee Options:** Utilizing industry-accepted cost apportionment principles, we will evaluate various fee options to fairly distribute the stormwater revenue requirements among different customer types. We will populate a stormwater rate design model to examine alternative rate structures, which may include residential tiered fee structures, updated non-residential charges, building footprints, or a customized combination of measured and uniform fees based on parcel classification.

- **Credits, Incentives, and Exemptions Evaluation:** As part of the cost of service analysis, we will review the current database of accounts to determine the existing level of credit participation (e.g., for detention basins, rain barrels, or other structural best management practices). We will evaluate the current fiscal year budget to determine an appropriate level of effort for a stormwater credit, incentive, or exemption policy. We will then identify modifications to these programs and input any resulting revenue impacts directly into the financial model.

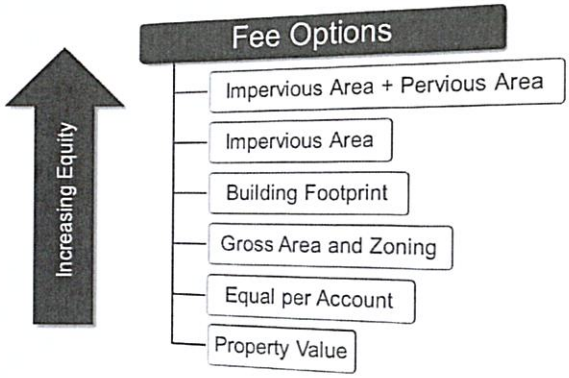


Figure 12. Stormwater fee options.

- **Rate Design and Revenue Recovery:** We will use the populated stormwater rate design model to calculate updated rate schedules based on the recommended fee structure. The updated allocations and resulting rates will be designed to equitably recover the required revenue while fully aligning with the City's operational needs, capital improvement goals, and public policy objectives.

Task 7: Final Rate Structure Modifications and Policy Alignment

Using the outputs from the previous tasks, we will formulate final rate structure modifications specifically calibrated to meet the City of Pompano Beach's four primary objectives:

- Fiscal stability
- Equity and proportionality
- Conservation and efficiency
- Regulatory and cost-of-service compliance

Rate Structure Analysis Summary	
Timeline	4 – 8 months
Deliverables	• Comprehensive rate study. • Interim rate structure update, recommendations, and comparisons. • Revenue elasticity and affordability analysis models. • Drafted or reviewed pass-through/large-user service agreements (e.g., BCWWS, Lighthouse Point).
Communication Tools & Public Engagement Support	• Excel-based, user-friendly rate model with instructions • Visual aids illustrating rate impacts, industry trends, and policy options • Policy briefs and executive summaries • Public workshop materials and presentations • Provide updates to ordinances, resolutions, and policies necessary to implement recommendations. • Presentations to City Commission and stakeholder groups • Coordination and collaboration with various internal and external stakeholders, including Administration, Budget, Finance, Engineering, Planning & Zoning, Legal, Private Entities, and the Public as needed.

Utility Billing and Data Review

Our proposed methodology for the Utility Billing and Data Review is designed to provide the City of Pompano Beach with a comprehensive evaluation of its utility billing, consumption, and financial data systems. This approach provides accurate rate development and revenue analysis while utilizing robust data analysis techniques to deliver customized, practical solutions for the City.

Task 1: System Familiarization and Stakeholder Engagement

Our initial phase focuses on developing a deep familiarity with the City's specific utility billing and financial systems. We will communicate effectively and collaborate with City staff to map out existing workflows, gather relevant records, and gain a full understanding of the City's unique challenges, objectives, and desired outcomes for this review.

Task 2: Comprehensive Data Review and Validation

Leveraging advanced data analysis techniques, our team will conduct a rigorous review of the City's utility billing data and revenue records to verify their accuracy and consistency. A critical component of this technical approach involves performing detailed revenue reconciliation and consumption validation analyses. By systematically matching billed consumption with generated revenues, we will establish a highly accurate data foundation that will confidently support subsequent financial modeling, rate design, and revenue sufficiency analyses.

Task 3: Gap Analysis and Improvement Recommendations

Throughout the review, we will apply our knowledge of current industry trends and best practices to assess the City's systems. We will actively identify any data limitations or structural bottlenecks within the existing billing and financial data frameworks. Upon identifying these gaps, our team will develop actionable recommendations for system or process improvements where appropriate, supporting full optimization of the City's data systems.

Utility Billing and Data Review Summary	
Timeline	1 – 3 months
Deliverables	• Revenue reconciliation and consumption validation analyses. • Recommendations for utility billing data system/information improvements.
Communication Tools & Public Engagement Support	• Executive summaries • Coordination and collaboration with various internal and external stakeholders, including Administration, Budget, Finance, Engineering, Planning & Zoning, Legal, Private Entities, and the Public as needed.

Development Services Process

Our technical approach for the City of Pompano Beach's Development Services Process is designed to create a streamlined, equitable, and transparent framework for new development. We understand that the City's objective is to ensure that development-related fees and policies accurately reflect service costs and adequately support the funding of growth-related infrastructure. To achieve clarity, innovation, and practical implementation, we have structured our methodology into four key Tasks:

Task 1: Workflow Process Assessment and Optimization

Our first step is to comprehensively evaluate the City's existing Utility development services workflow. We will map the current lifecycle from start to finish, analyzing the following critical touchpoints:

- Application intake and initial assessment.
- Fee collection and plan review.
- Permitting, inspections, and meter installation.
- Final acceptance.

Through collaboration with internal City staff and stakeholders, we will identify bottlenecks, integrate best practices, and recommend an optimized workflow process that enhances both internal efficiency and the developer experience.

Task 2: Comprehensive Fee Structure Analysis

To provide equitable cost allocation, we will conduct a detailed assessment of all current development-related fees. Our financial methodology will:

- Evaluate cost recovery fees, capacity charges, contribution requirements, and connection fees to achieve precise alignment with the actual costs of providing services.
- Analyze the funding models to verify these fees adequately support the City's capital improvement needs and appropriately fund growth-related infrastructure (backbone and localized).
- Develop a customized, data-driven fee structure and cost recovery recommendation that provides transparency and fiscal sustainability.

Task 3: Standardization of Procedures and Agreements

A core component of our approach is mitigating risk and providing consistency across all development projects. We will develop and provide standardized tools, including:

- A **standardized developer agreement template** that clearly outlines roles and responsibilities, specific construction requirements, asset transfer protocols, and final acceptance procedures.
- Standardized procedural guidelines for fee collection, permitting, inspections, testing, and the transfer of assets.
- Recommendations for system integration resulting in documentation and processes that flow seamlessly across the City's operational platforms.

Task 4: Documentation, Implementation, and Ordinance Support

To transition from assessment to actionable policy, we prioritize clear communication and thorough documentation. In this final task, we will:

- Prepare comprehensive, clear documentation detailing all recommended fees, policies, and procedures.
- Draft and provide necessary updates to City ordinances and policies required to legally support and enforce the new implementations.
- Provide training and support to City staff to facilitate organizational change management and successful adoption of the new procedures.

Development Services Process Summary	
Timeline	3 – 6 months
Deliverables	• Development services fee/process assessment and update. • Standardized developer agreement template. • Updated fee structures (capacity charges, connection fees). • Documentation of standardized procedures and required ordinance updates.
Communication Tools & Public Engagement Support	• Excel-based, user-friendly fee model with instructions • Visual aids illustrating fee impacts, industry trends/practices, and policy options • Policy briefs and executive summaries • Public workshop materials and presentations • Provide updates to ordinances, resolutions, and policies necessary to implement recommendations. • Presentations to City Commission and stakeholder groups. • Coordination and collaboration with various internal and external stakeholders, including Administration, Budget, Finance, Engineering, Planning & Zoning, Legal, Private Entities, and the Public as needed.

Miscellaneous Service Charges Review

Our methodology focuses on achieving cost recovery, equity, and transparency. We have structured our technical approach to deliver actionable, cost-based recommendations for all miscellaneous water, sewer, and stormwater service charges.

Task 1: Data Discovery and Workflow Review

Our team will initiate the project by collaborating closely with City staff to gather all relevant financial, operational, and billing data. We will map the internal workflows associated with each miscellaneous service to understand the true administrative, labor, equipment, and material costs involved. This phase emphasizes our commitment to **communicating effectively and engaging internal stakeholders** so that no hidden costs are overlooked.

Task 2: Comprehensive Cost-of-Service Evaluation

Utilizing customized data analysis techniques and fee modeling, we will use the information collected in Task 1 to populate cost computation templates to calculate updated and new fees/charges as illustrated in Figure 13 below. We will perform a rigorous bottom-up cost evaluation. We will calculate the exact cost of service for every item outlined in the scope, including but not limited to:

- Connection fees and tap fees
- Meter installation charges
- Service turn-on/turn-off fees
- Late/delinquency fees and tampering fees
- Miscellaneous field service charges and collection's system assessment fees

Figure 13. Example fee calculation process.

Task 3: Industry Benchmarking and Trend Analysis

To maintain competitive and equitable fees, we will integrate our knowledge of current industry trends and advanced cost recovery techniques. We will conduct benchmarking against comparable Florida municipalities to contextualize our findings and propose customized solutions that align with best practices.

Task 4: Implementation Strategy and Deliverables

The culmination of our review will be a detailed, user-friendly, miscellaneous fee template and a comprehensive report. Because practical implementation is a key evaluation criterion, we will not just provide a fee schedule; we will also provide the necessary updates to ordinances, resolutions, and policies required to formally enact these recommendations. Finally, we will provide visual aids, policy briefs, and presentations for the City Commission and other stakeholder groups to secure alignment and approval.

Miscellaneous Service Charges Review Summary	
Timeline	3 – 4 months
Deliverables	• Miscellaneous fee and deposit analysis and recommendations • Benchmarking report
Communication Tools & Public Engagement Support	• Excel-based, user-friendly fee template with instructions • Visual aids illustrating rate impacts, industry trends, and policy options • Public workshop materials and presentations • Provide updates to ordinances, resolutions, and policies necessary to implement recommendations. • Presentations to City Commission and stakeholder groups • Coordination and collaboration with various internal and external stakeholders, including Administration, Budget, Finance, Engineering, Planning & Zoning, Legal, Private Entities, and the Public as needed.

Grant Assistance

Our technical approach for providing grant assistance to the City of Pompano Beach is built upon a dual-focus strategy: 1) maximizing external funding opportunities to support sustainability and also 2) designing equitable relief programs for vulnerable ratepayers. We align our methodology with the City's core objectives of affordability, equity, and fiscal stability.

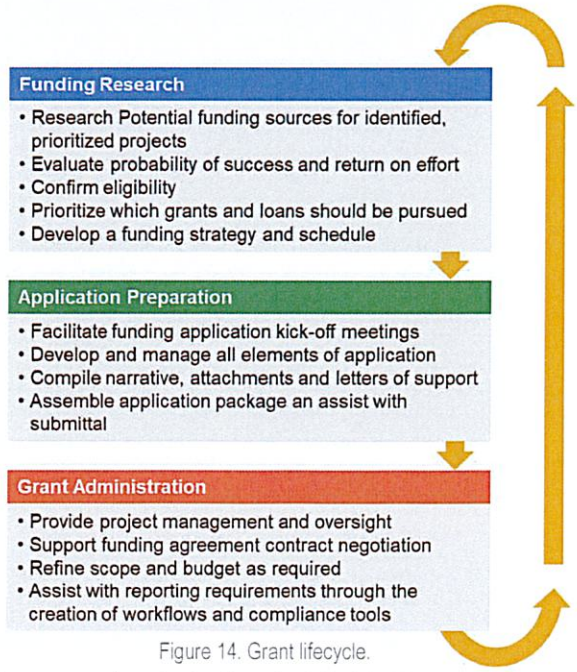


Figure 14. Grant lifecycle.

Task 1: Funding Identification and Application Support

Our team will conduct a comprehensive scan to identify applicable federal, state, and local grant and funding opportunities that align with the City's capital and operational needs. As outlined in Figure 14: Grant Lifecycle, we will systematically evaluate funding mechanisms such as the State Revolving Fund (SRF), the Water Infrastructure Finance and Innovation Act (WIFIA), and other federal and state funding programs. Our technical approach includes providing end-to-end assistance throughout the application process, advising on the preparation of required documentation to obtain funding from key agencies, including the Florida Department of Environmental Protection and other lending institutions.

Task 2: Development of Customer Assistance Programs

To support the City's focus on affordability and equity, we will develop targeted assistance programs for low-income and fixed-income customers. Our process involves:

- **Affordability Analysis:** Conducting comprehensive affordability assessments to identify the customer segments most in need of relief and evaluating various customer assistance options. Figure 15: Example of Affordability Considerations illustrates the key performance indicators—such as the Residential Indicator and Lowest Quintile Poverty Impacts—that we utilize to design targeted, effective relief programs.
- **Program Design:** Establishing clear, equitable eligibility criteria and designing streamlined administrative processes resulting in assistance programs that are both accessible to residents and manageable the City.
- **Industry Best Practices:** Leveraging knowledge of current industry trends and innovative programs to propose advanced solutions that meet the unique socio-economic landscape of Pompano Beach.

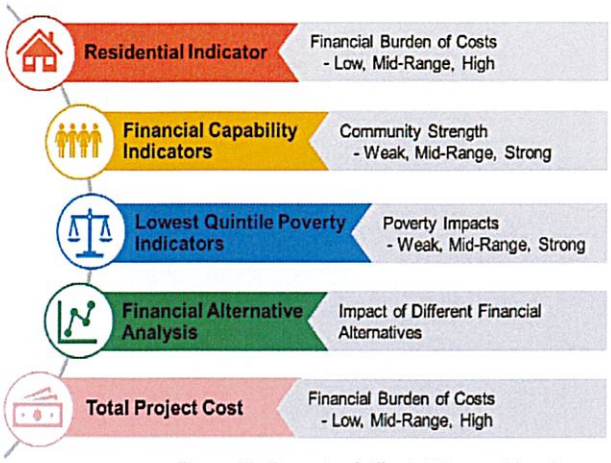


Figure 15. Example of affordability considerations.

Task 3: Integration into Financial Planning and Rate Structure

Standalone grant and assistance programs can create unintended financial imbalances if not properly modeled. Therefore, a critical step in our methodology is the direct integration of these assistance programs and anticipated grant revenues into the overall utility rate structure and multi-year financial plan.

- We will incorporate these variables into the multi-year revenue requirement and rate projection model.
- Through advanced scenario modeling, we will assess the sensitivity and financial impacts of grant inflows and the costs of and participation in assistance programs, verifying they do not compromise the City's debt service coverage ratios or targeted reserve policies.

Grant Assistance Summary	
Timeline	3 – 5 months
Deliverables	• Completed federal, state, and local grant applications. • Fully developed low-income and fixed-income customer assistance programs, including eligibility criteria.
Communication Tools & Public Engagement Support	• Visual aids illustrating rate impacts, industry trends, and policy options • Policy briefs and executive summaries • Public workshop materials and presentations

Organizational Structure

Our methodology for addressing the City of Pompano Beach Utilities Department's organizational structure is designed to evaluate current and future needs while ensuring the utility operates with maximum functionality and efficiency. To achieve this, our technical approach is broken down into four comprehensive tasks that align with the City's desired outcomes for modernization, performance monitoring, and change management:

Task 1: Current State Assessment and Compensation Review

We will initiate the project by conducting a deep-dive review of the Utilities Department's current operations across all divisions that builds on knowledge acquired during the recent independent review. This phase focuses on gathering quantitative and qualitative data to understand the baseline. Our team will:

- Analyze the existing staffing hierarchy and levels to identify operational bottlenecks or inefficiencies.
- Review current position classifications and job descriptions to confirm they accurately reflect the daily realities of the work.
- Conduct a comprehensive compensation and pay range comparison against peer municipal utilities to strengthen the City's ability to attract and retain top talent.

Task 2: Organizational Design and Restructuring Recommendations

Leveraging data collected and recent work with the City, we will formulate strategic recommendations for organizational restructuring. Our approach is designed to properly equip the City to handle both current responsibilities and future growth. Key activities include:

- **Identifying critical new positions** required to meet evolving operational and regulatory demands.
- Evaluating the organizational structure to facilitate the adoption of digital and transformational platforms, positioning the City to meet current and future industry standards for utility modernization.
- Delivering practical, innovative solutions tailored to the City's unique challenges and objectives.

Task 3: Performance Management and Succession Planning

To monitor the success of the restructuring and achieve long-term stability, we will build frameworks that measure performance and protect institutional knowledge. We will:

- Collaborate closely with City staff to develop targeted performance metrics and Key Performance Indicators (KPIs) that will be used to monitor and continuously improve organizational performance.
- Advise on comprehensive succession planning and knowledge retention strategies, including assessment protocols, to safeguard against brain drain as key personnel retire or transition.

Task 4: Strategic Implementation and Change Management

We recognize that successfully transitioning to a new organizational structure requires deliberate communication and workforce support. Our team will integrate change management best practices into the rollout by:

- Assisting with strategic implementation and specialized training strategies to guide staff through the organizational changes.

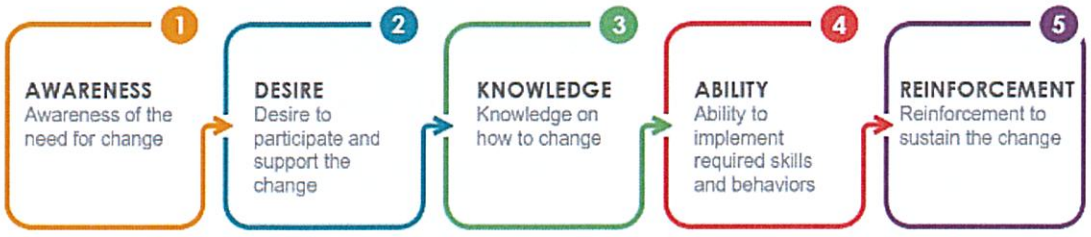


Figure 16. Prosci® ADKAR® model.

- Engaging key internal and external stakeholders—including Administration, Budget, Finance, and City staff—to build alignment, clarity, and buy-in throughout each transition. To support adoption and reduce resistance, we apply the Prosci® ADKAR® Model, guiding stakeholders through Awareness, Desire, Knowledge, Ability, and Reinforcement to support effective knowledge transfer and sustained adoption of new utility workflows.
- Providing clear communication tools, such as policy briefs and executive summaries, to facilitate internal decision-making and project tracking.

Organizational Structure Summary	
Timeline	6-12 months
Deliverables	• Benchmarking report • Organizational structure assessment • Dashboard visualizations and presentation materials • Organizational change management plan and execution report.
Communication Tools & Public Engagement Support	• Executive summaries • Public workshop materials and presentations • Coordination and collaboration with various internal and external stakeholders, including Administration, Budget, Finance, Engineering, Planning & Zoning, Legal, Private Entities, and the Public as needed.

Application of Industry Trends and Innovation

To support the City of Pompano Beach's goals for financial sustainability, operational efficiency, and infrastructure resiliency, our approach combines proven industry best practices with innovative strategies. We address the City's key challenges by applying advanced ratemaking practices, infrastructure financial management, and organizational change management.

Leveraging the Effective Utility Management Framework

Our strategic approach is grounded in the **Effective Utility Management (EUM)** framework, endorsed by the EPA, AWWA, WEF, and other leading water organizations. We utilize the EUM's Ten Attributes—such as Financial Viability, Infrastructure Strategy and Performance, and Operational Optimization—to help the City maintain a balanced focus across all areas. By integrating the EUM framework, the City can move from reactive problem-solving to proactive, long-term planning, providing equitable outcomes and long-term resiliency.

Advanced Ratemaking Mechanisms and Affordability

Modern utilities require rate structures that balance fiscal stability, customer equity, and resource conservation. Our team will apply advanced ratemaking mechanisms to modernize the City's revenue strategies by:

- **Rate Setting:** Defining the specific types of costs to include in fixed charges and identifying how they should be scaled and applied to each customer class, while also considering the use of multiple types of variable rate structures for different customer classifications and service types. This could include the use of allowances for reclaimed water base charges to encourage a certain amount of use during periods of high supply, or seasonal volumetric rates.
- **Affordability and Equity Initiatives:** Developing equitable rate structures and low-income/fixed-income customer assistance programs, so that the true cost of service remains affordable for all community members while adhering to industry standards. Based on experiences with other utilities in Florida, it may be appropriate to consider waivers and policies on non-rate fees, such as reconnection charges and late fees.
- **Growth Paying for Growth:** Updating capacity fees, connection charges, and developer agreements to accurately reflect system-wide backbone infrastructure costs, resulting in new developments proportionately fund the localized infrastructure they require. The structure of the charges, including how larger users demands are assessed and charged is of key importance.

GFOA Best Practices in Infrastructure Financial Management

To address the City's CIP funding gaps and heavy reliance on debt financing, we will apply the Government Finance Officers Association (GFOA) best practices for infrastructure financial management. We utilize a **lifecycle cost approach** that considers all outlays across an asset's lifespan—from acquisition and operations to maintenance and replacement. Our financial models will link the City's CIP with its Long-Term Financial Plan (LTFP), incorporating scenario modeling for debt issuance, inflation, and reserve policies to achieve sustainable capital funding strategies.

Organizational Change Management (OCM) and Process Innovation

Transforming organizational structures and adopting digital platforms requires intentional management of the "people side of change". To achieve lasting benefits and minimize disruption during organizational redesigns, we employ structured methodologies like the **Prosci ADKAR® Model**. Additionally, we leverage continuous process improvement lifecycles to optimize workflows, standardize operating procedures, and align the City's human capital with modern technology (such as GIS, SCADA, CMMS, and billing systems).

Applying National Expertise with Local Context

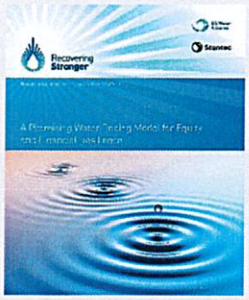
Our proposed strategies are backed by decades of industry leadership. Our team members are recognized experts who have literally written the book on utility finance, having contributed to foundational industry texts such as the AWWA M-1 (Principles of Water Rates, Fees, and Charges), AWWA M-54 (Developing Rates for Small Systems), AWWA M-29 (Capital Financing), and WEF's Manual of Practice No. 27 on wastewater rates.

Thought Leadership

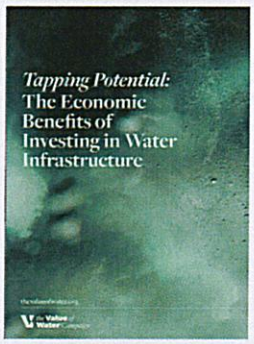
Stantec is actively involved in advancing innovative, data-driven solutions for today's utility challenges. We have highlighted a few recent collaborations that demonstrate our leadership in equitable pricing, strategic infrastructure investment with the US Water Alliance, and a recent research whitepaper with Bluefield Research on organizational change—delivering practical insights that help utilities build resilience and long-term value.

A Promising Water Pricing Model for Equity & Financial Resilience

In partnership with the U.S. Water Alliance, Stantec evaluated an innovative, property-based pricing model using real data from Greater Cincinnati Water Works and Milwaukee Water Works. The study assessed impacts on customers and utilities, with input from community-based social service partners to validate findings across diverse populations.



Read Report >



Read Report >

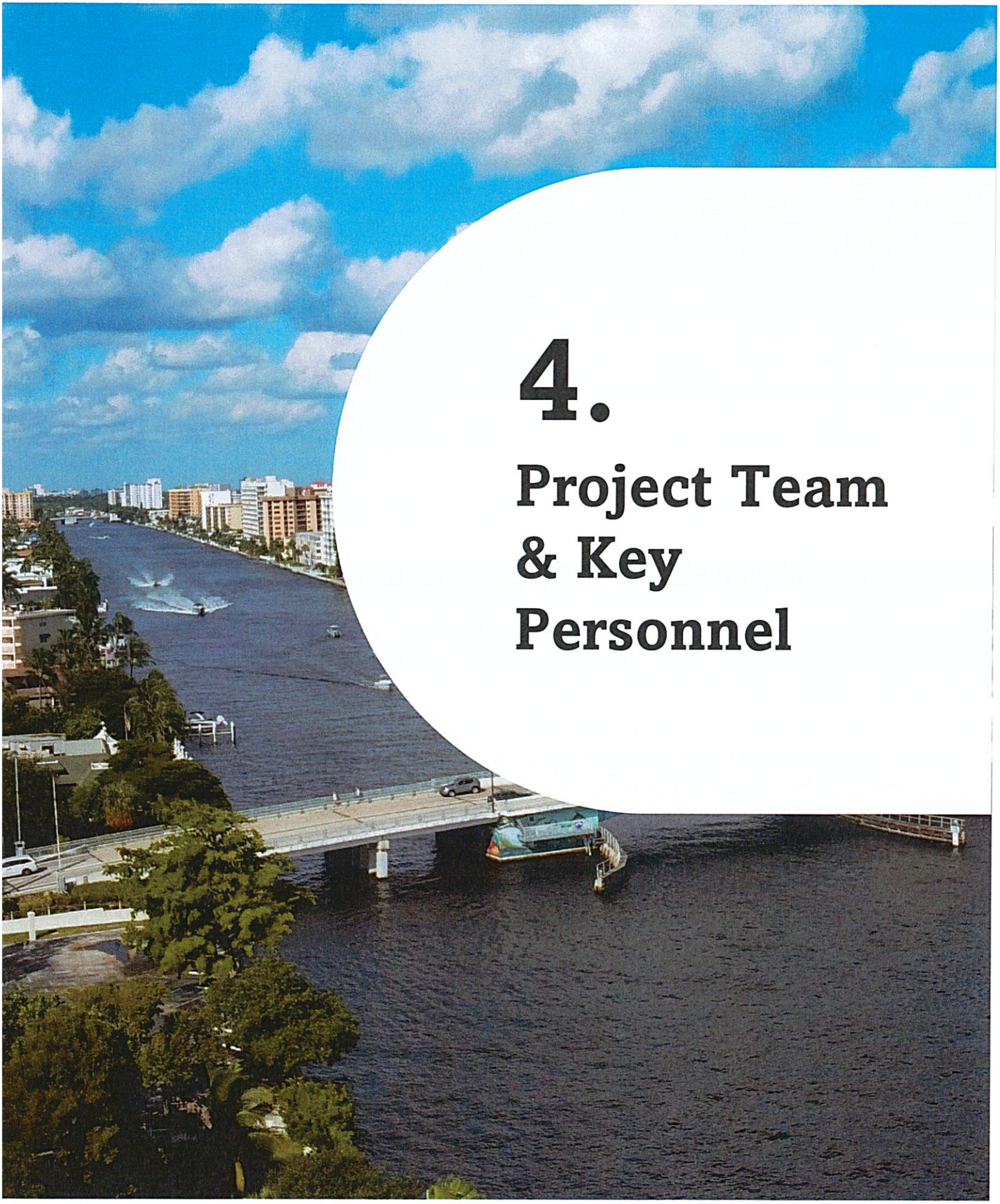
The Economic Benefits of Investing in Water Infrastructure

Developed by Stantec, in partnership with the Value of Water Campaign and One Water Econ, The Economic Benefits of Investing in Water Infrastructure is a landmark analysis of one of America's most pressing infrastructure challenges, one that remains out of sight and out of mind for so many. This report provides the most detailed picture to date of national and state-level funding needs for drinking water, wastewater, and stormwater systems. In a thorough assessment of risks, threats to economic competitiveness, and community impact, the report aims to shed light on the consequences of underinvestment, but also the extraordinary economic return of closing the water investment gap.

Organizational Change Management Navigating Growth & Complexity in Utility Operations

North American utilities face aging workforces, population changes, deteriorating infrastructure, digital transformation, and increasing regulatory demands. Stantec partnered with Bluefield Research to interview change leaders from 19 different utilities at all stages of OCM adoption. In this report, you'll find expert insights, proven frameworks, and practical lessons from leading utilities who used OCM to turn obstacles into opportunities.

Read Report >



4.

Project Team & Key Personnel

Key Personnel, Management, and Technical Staff

To meet the multifaceted needs of the City of Pompano Beach, we have assembled a premier team of industry-recognized experts seamlessly integrated into a highly efficient, two-tiered organizational structure. We do not rely on subconsultants; instead, we bring a unified team that combines deep-rooted Florida institutional knowledge with the national expertise of authors who write the foundational rate-setting manuals for the AWWA and WEF.

Because this contract will involve diverse, as-needed work authorizations—ranging from routine financial modeling to complex organizational restructuring—we have purposefully divided our resources into a **Core Team** and a **Technical Team**. This structure provides the City with continuous, high-momentum project management while only tapping into highly specialized (and cost-effective) technical expertise precisely when a specific task demands it.

Core Team

Our Core Team provides the day-to-day momentum, rigorous financial modeling, and unwavering quality control required to keep Pompano Beach's utility enterprise financially sustainable.

Primary Contact
Andrew Burnham
Vice President
(904) 631-5109
Andrew.Burnham@Stantec.com

- **Project Manager (PM) – Andy Burnham:** As your primary point of contact, Andy brings the experience of managing over 500 utility rate and financial planning studies. He drives the overarching strategy, aligning multi-year financial feasibility models to bridge the gap between capital funding optimization and ratepayer affordability.
- **Deputy Project Managers (DPMs) – Hani Alkhouli and Junaid Rahman:** Our DPMs deliver seamless day-to-day execution and provide crucial local context. Notably, Hani brings direct, recent experience managing an Independent Financial and Organizational Review specifically for the City of Pompano Beach, helping our team to hit the ground running with zero learning curve. Junaid supplements this with 26 years of business process analysis and functional transformation expertise.
- **Quality Assurance (QA) – Eric Grau:** With over 20 years of expertise in cost-of-service allocations, Eric serves as our independent QA lead. He provides rigorous oversight to verify all proprietary financial models, rate structures, and policy updates are accurate, legally defensible, and aligned with industry best practices.
- **Consultants, Financial Analysts, and Data Analysts:** This dedicated "engine room" of Consultants (Laura Arturo, Nish Patel, Nick Juliano), Financial Analysts, and Data Analysts specializes in the heavy lifting of crunching historical utility data, maintaining forecasting models, building customized Excel-based deliverables, and calculating specific affordability metrics to assess impacts on your diverse customer classes.

Technical Team

Our Technical Team of Subject Matter Experts (SMEs) provides on-demand, deep-dive expertise and technical leadership tailored exactly to the discrete tasks authorized by the City. These SMEs merge foundational industry standards with locally actionable solutions.

- **Rates Affordability & Policies (Carol Malesky):** A leading economist and rate practitioner who evaluates the characteristics of those with challenges in paying their bills, designing assistance programs around those needs, and tracking/enhancing participation.
- **Stormwater Rates (Kyle Stevens):** A leading expert in complex and innovative stormwater rate options, he will be essential to advice the City on how to accurately apportion, model, and recover its cost of service.
- **Billing Data (Lance Price):** A data scientist utilizing Python, SQL, and machine learning to parse massive datasets (like AMI data) for revenue reconciliation, consumption validation, and identifying peaking factors.

- **Development Services (Amy Campbell):** Specializes in development policy review and permitting to standardize workflows for application intake, inspections, and equitable cost recovery structures.
- **Miscellaneous Fees (Jeff Rackley):** Brings targeted expertise in updating utility-related fees, ensuring true cost recovery for connection fees, meter installation charges, delinquency fees, etc.
- **Grants (Emily Snyder):** Deployed to identify and secure federal and state infrastructure funding (SRF, WIFIA, BIL) and support compliance activities.
- **Organizational Structure (Joey Murphy):** Brings 30 years of operational management experience to conduct comprehensive workforce assessments, evaluate staffing hierarchies, and develop actionable KPIs.
- **Stakeholder Engagement (Nadia Vogt):** An expert in stakeholder facilitation who designs user-friendly visual aids, policy briefs, and public workshop materials to transparently communicate complex topics to elected officials and the public.

By utilizing this structured approach, the City of Pompano Beach benefits from the continuous stability of a dedicated Core Team, backed by an elite bench of Technical SMEs ready to execute any specialized task authorization efficiently and flawlessly.

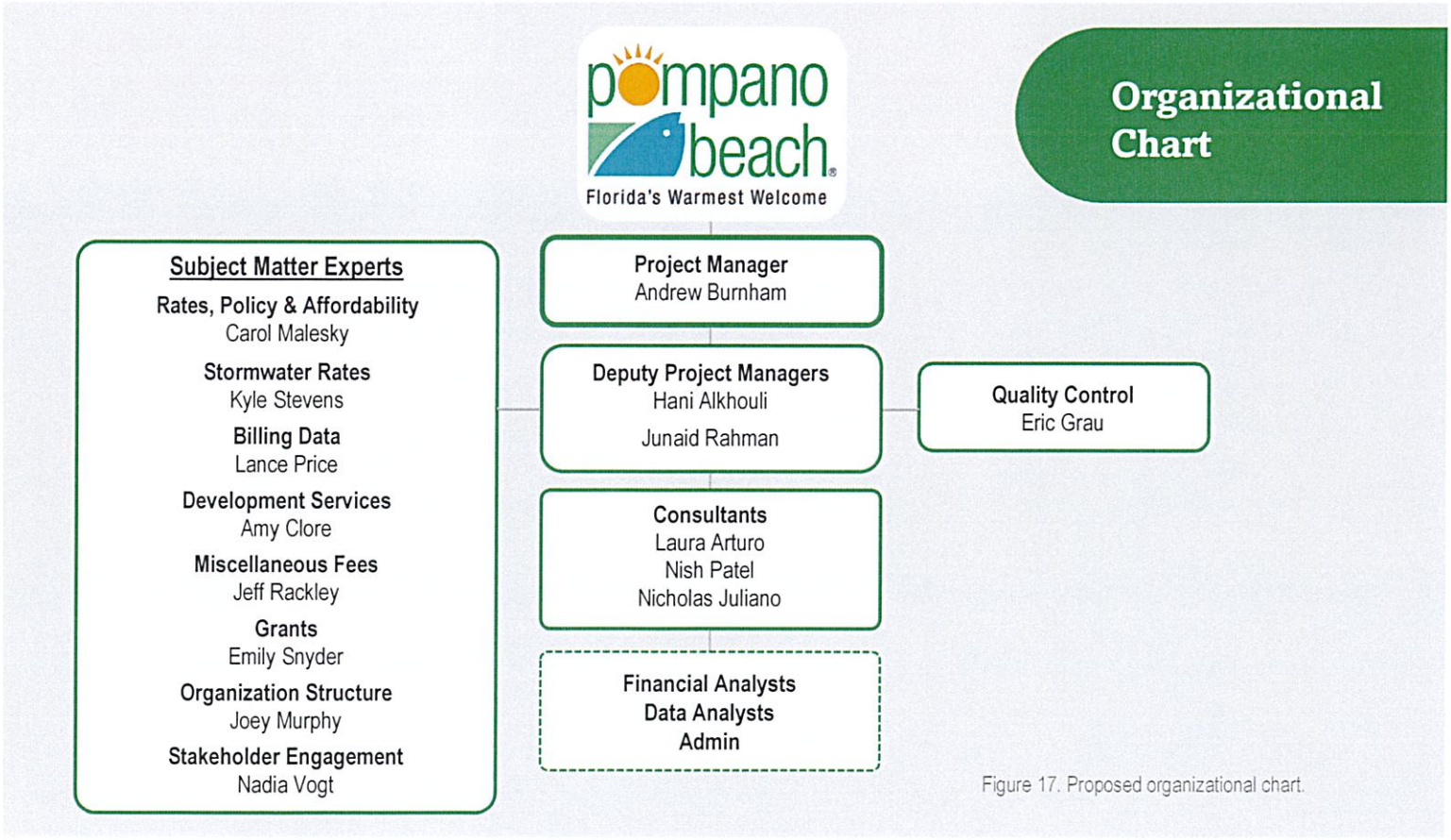


Figure 17. Proposed organizational chart.

Capacity & Workload

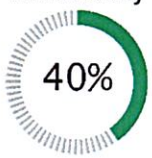
All proposed team members have sufficient workload capacity to support this project, with individual availability detailed in each individual's resume.

Key Personnel	Project Role	Availability
Andrew Burnham	Project Manager	40%
Hani Alkhouli	Deputy Project Manager	65%
Junaid Rahman	Deputy Project Manager	65%
Eric Grau	Quality Control	30%
Kyle Stevens	Stormwater Rates	50%
Carol Malesky	Rates, Policy & Affordability	40%
Joey Murphy	Organizational Structure	50%
Emily Snyder	Grants	40%
Amy Clore	Development Services	45%
Jeff Rackley	Miscellaneous Fees	60%
Lance Price	Billing Data	60%
Nadia Vogt	Stakeholder Engagement	50%
Laura Arturo	Consultant	60%
Nish Patel	Consultant	60%
Nick Juliano	Consultant	50%

Resumes

The following pages provide resumes for each proposed team member. These individuals have collaborated on similar projects throughout the State of Florida and will work seamlessly to perform your scope of services. We selected key personnel that have worked on local, long-standing rate and financial management Master Service Agreements.

Availability



Andrew Burnham

Vice President | Tampa, FL | 24 Years Experience

Project Role: Project Manager

Education:
Bachelor of Business Administration, Lake Superior State University, Sault Ste. Marie, Michigan, 2000

Registrations / Certifications / Memberships:
Rates and Charges Committee, American Water Works Association

Financial Accounting & Management Controls Committee, American Water Works Association

Member, Florida Section, Government Finance Officers Association

Member, Utility Resource Management Committee, The National Association of Clean Water Agencies

Management Committee, Water Environment Federation

Trustee of the Management & Leadership Division, American Water Works Association

As Vice President and Leader of Management and Technology Consulting at Stantec, Andy brings extensive experience conducting and overseeing cost of service allocations, financial planning analyses, and feasibility studies. His expertise includes rate studies, capital funding optimization, economic impact analysis, affordability analysis, business case evaluation, life cycle and replacement cost analysis, benchmarking, as well as technology planning and implementation. In the past five years alone, Andy has been involved with more than 500 studies for more than 150 local governments and supported clients in the issuance of more than $4 billion of debt financing for projects. He has also provided expert testimony for utility-rate-related regulatory proceedings in multiple states and before the Federal Energy Regulatory Commission. Andy is actively involved in multiple industry groups and recently served as a contributing author in the latest edition of AWWA Manual M1 – Principles of Water Rates, Fees and Charges.

Utility Rate Study Services | City of Clearwater | Clearwater, FL | Project Director
Andy served as project manager for the City's annual water, sewer, reclaimed water, solid waste, and recycling and stormwater rate studies. Each year, he oversees a detailed analysis of historical customer demand data, including the development of multi-year projections of the same based upon current economic and environmental conditions. As part of each study, a multi-year financial forecast and rate adjustment plan is developed for each utility. Andy also developed rate structures for the City that ensure fair and equitable rates and conformance to accepted industry practice and legal precedent. Each study included presentations of the results to City management, elected officials, and stakeholders

Utility Rate Consulting Services | Pinellas County Utilities | Clearwater, FL | Project Manager
Andy has served as the project manager for the County for nearly ten years, including a comprehensive Water, Wastewater and Solid Waste Rate Study and several annual updates. During these studies, Andy has used our FAMS-XL model to develop ten year financial plans for the water, sewer and solid waste enterprise funds. He has also conducted a benchmarking analysis, assisted County staff in evaluating the underlying cost of operations, and conducted detailed cost allocation and overhead studies for the Utilities Department.

Water Resources, Stormwater, & Sanitation Rate Studies | City of St. Petersburg | St. Petersburg, FL | Project Manager
Andy created an innovative, data-driven approach to evaluate tier-based rate structures by analyzing impervious area data from approximately 1,300 residential parcels. The sample was normalized to reflect citywide parcel sizes and applied across all residences to model tiered rates and customer impacts. He used dynamic data visualization and real-time GIS mapping to show rate and bill impacts, building transparency, stakeholder understanding, and support for implementation.

Revenue Sufficiency Analyses | Marion County FL | Project Manager
Andy has served as the project manager for the County for over ten years. During this time, he has managed a variety of initiatives including multiple water, wastewater, and irrigation revenue sufficiency analysis to ensure adequate revenues to meet projected cost requirements; development of inclining block rates, as well as a plan for common rate structure through the County which combined five disparate rate districts into one common inclining block rate structure; and development of a detailed customer impact analysis to demonstrate the impact of the new rate structure upon the cost of service to all customers classes in each rate district.

Utility Rate & Financial Consulting Services | Toho Water Authority | Kissimmee, FL | Project Director
Andy recently served as Project Director for a reclaimed water cost of service and rate design for the Authority. The study included a detailed cost allocation analysis that evaluated the current level of cost recovery from existing rates and examined alternative rate designs for the Authority, including the resulting impacts to retail and bulk customers. The Authority adopted the recommendations developed during the study, which included modifications to provide a consistent level of cost recovery amongst all customer classes and a modified retail reclaimed water rate structure that is consistent with its potable water rate structure.

Financial Consulting Services | City of Fort Lauderdale | Fort Lauderdale, FL | Project Director
Andy served as project director for an integrated ten-year financial sustainability model of utility enterprise funds and airport, building, and parking special funds. The goal was to determine the current and projected financial condition of the City over a ten-year projection period and develop strategies to ensure financial sustainability that included cost reduction/containment measures and revenue diversification/enhancements. Where interfund transactions occur, the individual models were linked to reflect the flow of funds from and to each fund. The annual comprehensive financial sustainability analysis for the parking fund included the City's long-term plan for adequate parking supply and considered citizenry pricing sensitivity. The annual comprehensive financial sustainability analysis of the airport fund ensured it met ongoing obligations such as budgeted operating expenses, capital improvements, existing debt service, and minimum reserve targets.

Utility Rate & Financial Consulting Services | Pasco County | New Port Richey, FL | Project Manager
Andy served as Project Manager for the County's water, sewer, and reclaimed water rate study, which included five- and ten-year revenue sufficiency analyses. He evaluated capital improvement funding options, debt service coverage targets, operating and capital reserve levels, and key financial policies. His work assessed alternative CIP scenarios, cost escalation factors, impact fees, miscellaneous charges, and demand elasticity related to rate changes and conservation efforts.

Water Resources Rate & Financial Consulting Services | Orange County | Orlando, FL | Project Manager
Andy has served as the project manager or a lead consultant for the County for over 15 years. During that time, he has conducted several revenue sufficiency analyses to ensure adequate revenue to meet projected cost requirements, periodic water and wastewater impact fee studies, water and sewer rate structure analysis, reclaimed water cost of service study and presentations of the results to management, elected officials and other stakeholders. In addition, he led a bond feasibility study for the County including preparation of a bond report. Our recommendations have been implemented, and the utility has been able to maintain a very good credit rating with low rates and annual rate adjustments.

Water & Wastewater Financial Planning, Cost Allocation & Rate Design | Jacksonville Electric Authority (JEA) | Jacksonville, FL | Project Manager
Andy has led a wide range of financial advisory and consulting services. These have included developing an understanding of the business organization forms being applied to the sewer business and industry practices for converting septic tanks to central sewer service; identifying the costs associated with treating landfill leachate from the City of Jacksonville; supporting evaluation and negotiation of the terms of service for new development on a wholesale basis; evaluating repair and rehabilitation funding levels, unit costing, and development of capacity charges; and conducting a comprehensive cost of service and rate design study using detailed data and granular approaches.

Water & Wastewater Rate Consulting Services | City of Naples | Naples, FL | Project Manager
Andy served as the project manager for the City's comprehensive water and sewer rate study. Andy worked with City staff to customize a multi-year financial forecasting model. He also reviewed the current water and sewer rate structures and developed modifications to ensure the City's rates conformed to accepted industry practice and reflected the appropriate distribution of system costs, while providing cost incentive to encourage water conservation.

A Promising Water Pricing Model for Equity & Financial Resilience | US Water Alliance | Senior Advisor
Andy served as the Senior Advisor on a report authored with the US Water Alliance and our partners in Cincinnati and Milwaukee, that outlined a cost-based approach to pricing water by moving costs from usage-based rates to charges based on a customer's property characteristics. We determined that property value was the most effective in achieving more equitable outcomes than the current utility pricing model. These methods could have the added benefit of increasing the proportion of fixed revenue while simultaneously addressing affordability concerns, potentially meeting multiple utility objectives.

Availability

Hani Alkhouli, MIAM, Prosci, CPM

Principal | Tampa, FL | 29 Years Experience

Project Role: Deputy Project Manager

Education:
MA, Finance, The Arab Academy, Amman, Jordan, 2000

Registrations / Certifications / Memberships:
Process Manager Certificate, APQC, Houston, TX, 2025

Asset Management Certificate, IAM, Tampa, Florida, United States, 2023

IPSAS, ACCA, Doha, Qatar, 2020

Change Management Certificate, PROSCI, Dubai, UAE, 2016

Hani has 29 years of experience in large-scale diverse businesses and the public sector, leading value optimization strategy development and implementation through transforming processes, technology, and people. With around 19 years of experience in the infrastructure industry supporting asset management programs, strategic planning, and organizational performance, he excels at applying process mapping methodologies to improve efficiency and effectiveness.

Hani holds a master's degree in Finance and certification in Asset Management, Change Management, and Process Management. Hani is interested in leading diverse teams for successful business transformation and implementation of digital solutions.

Independent Financial and Organizational Assessment | City of Pompano Beach | Pompano Beach, FL | Project Manager
Directed an Independent Financial and Organizational Review of Utilities Operations for the City of Pompano Beach, managing a 120-day, four-phase engagement that included project initiation, operational assessments, financial evaluations, and final reporting. Hani led a multidisciplinary consulting team and collaborated directly with municipal utility leadership to flexibly allocate project resources, evaluate organizational scalability, address workforce succession gaps, and analyze complex utility financial models and rate structures. Successfully oversaw the project lifecycle from data collection to the final delivery of a comprehensive presentation and data-driven report, providing city stakeholders with critical risk analyses and a quantifiable, prioritized list of recommendations to optimize operational efficiency and guide future capital and workforce investments.

Utilities Staffing and Level of Service Assessment | City of Cape Cora | Cape Cora, FL | Project Manager
Hani successfully led a comprehensive project to evaluate the staffing needs and service levels of the Cape Coral Utilities Department. Conducted in-depth analysis of current operations, workload projections, and industry benchmarks to inform future staffing strategies. Collaborated closely with key stakeholders to ensure project objectives were met and recommendations were aligned with departmental goals. Effectively utilized data collection techniques, including document review, interviews, observation, and data analysis, to provide a robust assessment of the department's staffing requirements.

Procurement Department Staffing and LOS Assessment | Toho Water Authority | Kissimmee, FL | Project Manager
As project manager for the Procurement Department Staffing and Level of Service Assessment, Hani led a thorough review of staffing, roles, and service delivery. He defined the project scope, designed a multi-pronged assessment approach (staff & leadership interviews, stakeholder feedback, workload analysis), and oversaw data collection. Hani then analyzed findings to identify departmental strengths, weaknesses, opportunities, and threats (SWOT analysis). Leveraging this analysis, he formulated actionable recommendations to improve staffing, optimize roles, and enhance service delivery. These recommendations were prioritized and accompanied by a realistic implementation timeline. The final report provided a comprehensive assessment of the department, along with actionable steps for improvement.

Benchmarking Study for Utility Operations | City of Pinellas Park | Pinellas Park, FL | Task Leader
Hani carried out a benchmarking study to measure the various operating and financial performance metrics of the City of Pinellas Park's Water & Sewer Enterprise Fund compared to local utilities to find examples of strong performance and identify opportunities for improvement. He presented insights to the client for improvement opportunities related to system reinvestments and financial health.

Utility Valuation | Town of North Redington Beach | North Redington Beach, FL | Project Manager
Hani successfully led a comprehensive project to coordinate wastewater collection system engineering, inspections, capital needs, and technical documentation for Town of North Redington Beach. Provided an independent valuation, ensuring informed decision-making for the County's acquisition. Identified and mitigated potential risks, conducted detailed financial and rate impact analyses, and assisted with compliance under Chapter 125 Florida Statutes to safeguard public interests.

Regionalization Analysis and Support Services | Town of Wrightsville Beach | Wrightsville Beach, NC | Project Manager
As Project Manager for the Regionalization Analysis and Support Services project, Hani successfully directed the Data-Driven Analysis, Financial Forecasting, and Rate Analysis. He ensured the client's interests were fully protected by coordinating an independent evaluation of the regionalization proposal, critically assessing its financial modeling, governance, customer service, and other key components. His transparent communication facilitated effective engagement with all relevant stakeholders.

IT Govern Cybersecurity Improvement Roadmap | Toho Water Authority | Kissimmee, FL | Change Management Practitioner
Hani leads OCM services that address the direct impacts of implementing a new cybersecurity governance framework on executives, managers, and staff, including changes to roles, routines, and reporting. His approach applies the ADKAR® model and is delivered in three phases: preparing for change through impact assessments and staff surveys; managing change through tailored communication, sponsorship, and resistance management plans; and reinforcing change by sustaining outcomes through ongoing reinforcement strategies and performance monitoring beyond implementation.

Atlantic and Neptune Beaches Feasibility Analysis & Acquisition Support | JEA | Jacksonville, FL | Project Manager
Hani led a comprehensive evaluation of the Atlantic and Neptune Beaches Water and Sewer System to assess its acquisition feasibility. Developed detailed financial models to predict long-term financial implications, ensuring transparency and equitable transition. Coordinated asset evaluations, identified necessary improvements, and quantified system value. Fostered community engagement through stakeholder meetings and public outreach initiatives. Ensured compliance with Florida Statutes governing utility acquisitions, mitigating risks and streamlining the approval process.

Public Interest and Water Quality & Supply Utility Valuation | Grove Land Reservoir and Stormwater Treatment Area | Okeechobee, FL | Project Manager & Financial Consultant
As Project Manager and Financial Consultant for the Grove Land Reservoir and Stormwater Treatment Area (GLRSTA) valuation project, Hani led an independent, business-focused financial analysis on behalf of the St. Johns River and South Florida Water Management Districts. Directing a team of engineering and financial experts, Hani oversaw a detailed discounted cash flow analysis that critically refined capital and operational cost estimates to establish a realistic financial baseline. To quantify the project's true worth, he developed defensible valuation methodologies that established raw water values using market data, calculated environmental improvements based on the client's actual alternative nutrient removal costs, and isolated direct, mission-aligned agency benefits from speculative regional impacts. Ultimately, he delivered a clear, data-driven assessment that validated the project as a net positive investment, highlighted potential financial risks, and empowered the client to make confident, strategic decisions on a generationally important water resource initiative.

Sanitary Master Plan - Policy and Financial Evaluation | City of Ann Arbor | Ann Arbor, MI | Task Manager
As Task Manager for the Policy and Financial Evaluation of the Ann Arbor Sanitary Sewer Collection System Comprehensive Plan, Hani led the assessment of equitable funding strategies to ensure that new development pays for growth. He reviewed the City's Capital Cost Recovery model and Developer Offset Mitigation Program, evaluated alternative funding sources used by peer communities, and ensured compliance with financial and legal requirements. He also facilitated stakeholder working sessions and public meetings, presenting clear financial tradeoff analyses and policy recommendations to City Administration and City Council.

Availability

Junaid Rahman, CPA, Prosci

Managing Consultant | Tampa, FL | 27 Years Experience

Project Role: Deputy Project Manager

Education:
BS, Finance & Accounting, Indiana University, Bloomington, IN, 1997

Registrations / Certifications / Memberships:
Certified Process Manager, American Productivity & Quality Center (APQC), Houston, TX, 2025

Prosci® Certified Change Practitioner, Prosci, Fort Collins, CO, 2025

Certified Public Accountant (CPA), Denver, Colorado, United States, 2007

Junaid is a management consultant and project manager with 27 years of experience in financial planning and analysis, business process analysis and improvements, performance monitoring, functional transformation, and change management. He has 17 years of experience in the water resources, utilities, and infrastructure industry. In his current role, Junaid is responsible for financial feasibility analyses of utility acquisitions and bond issuances, revenue sufficiency analysis, utility process optimization, organizational assessment and change management, and operational and financial benchmarking.

Water & Wastewater Rate Study | Orange County Utilities | Orlando, FL | Managing Consultant
Utilized Stantec's customizable rate design model to accurately reflect the unique characteristics of Orange County's Water and Wastewater systems with respect to revenues, expenses, cost allocations, policies, and assumptions, and other objectives. In addition, modeled different scenarios and present results of the analysis to County staff. Furthermore, conducted a survey of rate structures in place at other jurisdictions and prepare a comparative analysis. Documented the results of the rate study in a report.

Water & Wastewater Revenue Sufficiency Analysis | Marion County | Marion County, FL | Managing Consultant
Developed a multi-year financial management plan that includes projections of revenues, operation and maintenance costs, asset renewal and replacement, capital improvements and debt service costs. Additionally, he created alternative scenarios of rate adjustments and capital expenditure, and reviewed results with County staff. Prepared a report of the revenue sufficiency analysis.

Financial Feasibility Support for Bond Issuances | Peace River Manasota Regional Water Supply Authority | Lakewood Ranch, FL | Managing Consultant
Responsible for preparing a five-year financial forecast that consists of the financial results of operations for the Regional Water Supply Authority, and a financial feasibility report supporting the Authority's proposed issuances of the Utility System Revenue Bonds.

Financial Planning & Analysis Support | Peace River Manasota Regional Water Supply Authority | Lakewood Ranch, FL | Managing Consultant
Responsible for ongoing support of the regional authority's use of Stantec's Financial Analysis and Management System (FAMS). Additionally, we provided financial planning and analysis support in connection with the development of the 2025 Budget.

Cape Coral Utilities Staffing and Level of Service Assessment | City of Cape Coral | Cape Coral, FL | Organizational Assessment Consultant
Evaluated the staffing needs and service levels of the Cape Coral Utilities Department. Conducted in-depth analysis of current operations, workload projections, and industry benchmarks to inform future staffing strategies.
Collaborated closely with key stakeholders to ensure project objectives were met and recommendations were aligned with departmental goals. Effectively utilized data collection techniques, including document review, interviews, observation, and data analysis, to provide a robust assessment of the department's staffing requirements.

Financial Feasibility of Utility Acquisitions | JEA | Jacksonville, FL | Managing Consultant
Responsible for developing a financial model to evaluate the feasibility of potential utility acquisitions. This includes preparing analyses of utility valuation, financial forecasts, and rate impacts.

Financial Planning Processes & Tools | Public Works Authority | Doha, Qatar | Process Improvement Specialist
Developed and implemented a financial management strategy to transform and optimize financial processes, tools, and resources. Mapped and analyzed budgeting and forecasting processes and identified process inefficiencies and weaknesses. Improved budgeting and forecasting processes and tools aligned with the asset management investment process, including investment prioritization, SLA target setting for all process stages, and a framework for performance monitoring and reporting. Project outcomes: increased budget and forecast accuracy, fostered budget delivery collaboration, and improved accountability and responsibility.

Improved Asset Lifecycle Cost Analysis | Public Works Authority | Doha, Qatar | Process Improvement Specialist
Developed and improved the process of recording and classifying Drainage and Roads infrastructure operational and capital expenditure to ensure that expenditure information is available by asset, maintenance, and cost type, and by network and zone. Project outcomes: enhanced data availability for asset lifecycle analysis, asset management decision-making, and improved capital investment analysis accuracy.

Full Costing Framework & Benchmarking for Infrastructure Operation & Maintenance | Public Works Authority | Doha, Qatar | Process Improvement Specialist
Developed a full cost analysis and optimization model and process, and completed a benchmarking study for water, wastewater and roads infrastructure costs, leading to influence efficiency improvements, cost reduction, tariff setting, and enhanced asset management decision-making.

Utility Valuation, Acquisition, and Transition Program Support Services | Pinellas County Utilities | Clearwater, FL | Managing Consultant
Successfully led a comprehensive project to coordinate wastewater collection system engineering, inspections, capital needs, and technical documentation for the Town of North Redington Beach. Provided an independent utility valuation, ensuring informed decision-making for the County's acquisition. Identified and mitigated potential risks, conducted detailed financial and rate impact analyses, and assisted with compliance under Chapter 125 Florida Statutes to safeguard public interests.

Financial Planning & Analysis Support | City of Tallahassee's Water Utility | Tallahassee, FL| Managing Consultant
Responsible for ongoing support of the City's use of Stantec's Financial Analysis and Management System (FAMS) for the water and sewer funds. This includes updating and configuring the financial model to ensure it is aligned with the City's current approaches to cash management and capital funding, and customizing reports, charts, and tables to match internal reports.

Feasibility Study for Wastewater Treatment Plant Expansion | Ministry of Works, Municipalities Affairs and Urban Planning | Bahrain | Financial Analyst
Provided financial analysis support (including development of a financial forecasting and sensitivity analysis model) related to the feasibility study for the expansion of the PPP arrangement for the Muharraq Sewage Treatment Plant in Bahrain.

Billing & Collection Process Improvements and Integrated Solutions | Public Works Authority | Doha, Qatar | Process Improvement Specialist
Created and implemented robust billing & collection processes and integrated solutions (CRMS-ORACLE-SharePoint). Collaborated with cross-functional teams to ensure process improvements are aligned with overall business goals. Project Outcomes: increased cost recovery and improved user habits resulting in cost reduction.

Availability

30%

Eric Grau, MBA, PMP

Principal | Jacksonville, FL | 21 Years Experience

Project Role: Quality Control

Education:
MBA, Finance, University of Florida, Gainesville, Florida, 2017

Bachelor of Science in Finance, University of Florida, Gainesville, Florida, 2004

Registrations / Certifications / Memberships:
PMP, Project Management Professional, Jacksonville, Florida, United States, 2019

Eric has 20 years of experience in providing cost of service allocation analyses, long-term financial planning and sustainability analyses, development and evaluation of alternative rate structures, as well as the development of capacity charges for water, wastewater, reclaimed water, stormwater, solid waste, and recycling utility systems, and he has participated in or managed over 200 such studies. Eric has superior financial, business, and analytical skills, and has provided our consulting practice with exceptional financial analyses based upon applications of sound financial and economic concepts with an unparalleled attention to detail.

Utility Rate & Financial Consulting Services | Pasco County | New Port Richey, FL | Quality Control
Eric provided high-level quality control oversight throughout the duration of the Pasco County utility rate studies and related financial consulting engagements. He was responsible for conducting detailed reviews of all key work products, including the financial plan, cost of service analysis, rate structure recommendations, and final reports, to ensure accuracy, clarity, and alignment with industry best practices. Eric's oversight helped maintain the integrity and credibility of the study findings, supporting successful adoption of multi-year rate plans and financial strategies by the County Commission in both 2017 and 2021.

Utility Rate & Financial Consulting Services | Toho Water Authority | Kissimmee, FL | Quality Control Reviewer
Eric served as the Quality Control Reviewer for the Authority's water and wastewater rate studies and related financial analyses. In this role, he conducted thorough technical and editorial reviews of key deliverables, including the financial management plan, cost of service analyses, rate structure evaluations, and supporting documentation. His oversight ensured accuracy, consistency with industry standards, and alignment with the Authority's financial objectives. Eric also reviewed modeling assumptions and outputs, ensuring that recommendations were well-supported and clearly communicated to Authority management and other stakeholders.

Utility Rate Consulting Services | Pinellas County Utilities | Clearwater, FL | Project Consultant & Quality Control
Eric has served the County as a Project Consultant since 2005. He assisted the County during the development of a comprehensive water, wastewater and solid waste utility rate study, as well as several subsequent updates. During these studies, Eric has used our model to develop ten year financial management plans for each of the separate water, sewer, and solid waste enterprise funds. He has also assisted County staff in evaluating the underlying cost of operations, and conducted detailed cost allocation and overhead studies for the Utilities Department in support of the budget development process. In 2017, Eric's role shifted to a focus on Quality Control, evaluating deliverables and helping the team manage the scope of work and project objectives.

Water & Sewer Cost of Service and Rate Study Services | City of Chesapeake | Chesapeake, VA | Quality Control
Eric served as the Quality Control Reviewer for the City's water and wastewater rate studies and related financial analyses. In this role, he conducted thorough technical and editorial reviews of key deliverables, including the financial management plan, cost of service analyses, rate structure evaluations, and supporting documentation. His oversight ensured accuracy, consistency with industry standards, and alignment with the City's financial objectives. Eric also reviewed modeling assumptions and outputs, ensuring that recommendations were well-supported and clearly communicated to City management, Council, and other stakeholders.

Stormwater, Water & Sewer Consulting Services | City of Tarpon Springs | Tarpon Springs, FL | Project Manager
Eric has served as both a Project Consultant and Project Manager since 2005, annually updating the City's comprehensive water and sewer and stormwater revenue sufficiency analyses. During these updates, Eric has used our model to develop ten year financial management plans for the City's water and sewer, and stormwater enterprise funds. He has also participated in the calculation of water and sewer impact fees, a bulk water rate analysis involving the detailed allocation of water and sewer utility system costs among water customer classes, and preparation of a financial feasibility report supporting the issuance of approximately $36 million of revenue bonds critical to funding construction of a reverse osmosis water treatment plant. While the City has in place approved multi-year plans of annual water, sewer, and stormwater rate increases, the City still desires annual reviews of its financial management plans and plans of annual rate adjustments to account for changes in customer growth, regulatory requirements, and other key variables.

Financial Analysis | Orange County Utilities | Orlando, FL | Project Manager
Eric has served the County as both a Project Consultant and Project Manager since 2008, assisting the County every couple years to update its comprehensive water and sewer revenue sufficiency analysis, as well as the County's water and sewer capital charges. During these updates, Eric has used our model to develop multi-year financial management plans for the County's water and sewer enterprise fund. He has also assisted the County in the preparation of a financial feasibility report supporting the issuance of approximately $90 million of revenue bonds critical to funding necessary system improvements.

Utility & Rate Consulting | JEA | Jacksonville, FL | Project Manager & Quality Control
As Project Manager, Eric has overseen project delivery across multiple analyses including a detailed cost-of-service study and identification of rate revenue requirements for miscellaneous fees. In his role in Quality Control, Eric ensures deliverables are met and helps the team manage the scope of work and project objectives.

Water Resources, Stormwater, & Sanitation Rate Studies | City of St. Petersburg | St. Petersburg, FL | Project Manager
Eric has served as both a Project Consultant and Project Manager since 2005, annually updating the City's multi-year financial management and rate adjustment plans for water, sewer, reclaimed water, and stormwater services. During these updates, Eric has used our model to develop five to 20 year financial management plans for the City's water resources and stormwater enterprise funds, including detailed cost allocation analyses to isolate costs between water, sewer, and reclaimed water services and further allocation to retail and wholesale users to ensure fair and equitable rates that also conform to industry practices an legal precedent. Eric has also provided detailed analyses of historical customer and demand data, including development of multi-year projections of the same based upon current economic and environmental conditions.

Utility Rate & Financial Consulting Services | Okaloosa County | Ft. Walton Beach, FL | Project Manager
Eric has served as both a Project Consultant and Project Manager for the County since 2005, annually updating the County's comprehensive water and sewer revenue sufficiency analysis. During these updates, Eric has used our model to develop ten year financial management plans for the water and sewer enterprise fund. He has also participated in a reclaimed water utility rate study, the calculation of updated water and sewer impact fees, and preparation of a financial feasibility report supporting the issuance of approximately $60 million of revenue bonds critical to funding necessary system improvements.

Availability

Kyle Stevens

Consultant | Tampa, FL | 15 Years Experience

Project Role: Stormwater Rates

Education:

MS, Applied Economics, Florida State University, Tallahassee, Florida, 2010

BS, Economics, Florida State University, Tallahassee, Florida, 2008

Kyle has extensive experience in populating and customizing long-term financial planning, cost allocation, rate design, impact fee, and miscellaneous service fee models. He has superior financial, business and analytical skills and has provided our clients with exemplary financial analysis based on application of sound financial and economic concepts. Kyle has strong Excel modelling skills and has experience working with large data sets and financial models, including our interactive model and specific user charge and assessment modules. Kyle has a high level of proficiency within our modelling system, and he has been very involved in recent engagements requiring substantial model customization and in providing ongoing support services to our clients using our financial forecasting module.

Development & Implementation of Stormwater Tiered Fee Structure | City of St. Petersburg | St. Petersburg, FL | Stormwater Subject Matter Expert

Supported the City of St. Petersburg in the evaluation and refinement of its stormwater utility rate structure through completion of a comprehensive cost-of-service analysis and stormwater fee design. Analyzed system costs and operational expenditures to allocate expenses in accordance with cost causation principles and industry best practices. Assisted in the development of an updated stormwater fee structure intended to equitably distribute costs among properties based on their contribution to stormwater runoff. In addition, evaluated and refined the City's stormwater credit program to ensure that credits appropriately reflect measurable reductions in runoff resulting from private stormwater management practices. The work helped strengthen the transparency, defensibility, and long-term sustainability of the City's stormwater funding framework.

Long Term Financial Modeling and Sustainability Analysis | City of Fort Lauderdale | Fort Lauderdale, FL | Consultant

Kyle has served as the Project Consultant for a long-term financial modeling and sustainability analysis for the City in which he developed a common financial forecasting modeling platform that could be used for real-time evaluation and understanding for its key services, including its General Fund and seven separate major funds (Water/Sewer, Regional Wastewater, Stormwater, Sanitation, Airport, Parking, and Building funds). He customized individual models for each fund and linked each model together to evaluate and understand a variety of decision alternatives and their current and future consequences to each fund. As part of the City's annual budget process, we perform simultaneous updates to all the models.

Water & Wastewater Rate Consulting Services | City of Naples | Naples, FL | Lead Consultant

Kyle worked for five years in assisting the City with rate revenue projections, cost of service, impact fees and utility rate design analysis. Of note was his working in helping the City quantify the fiscal impacts of expanding reclaimed service. This effort consisted of predicting which customers would elect to connect to the system and how much revenue would be lost from converting pricier potable irrigation water to reclaimed water. The results helped illuminate the areas ripe for expansion and help define the rate of expansion that the utilities revenues could support.

Storm Drainage Charges Financial Analysis | Louisville and Jefferson County Metropolitan Sewer District | Louisville, KY | Stormwater Subject Matter Expert
Analyzed impervious area data and developed a tiered stormwater fee structure for single-family residential properties to support the District's transition from a uniform flat fee to a more equitable, usage-based rate framework. Evaluated parcel-level impervious surface data to establish representative tiers that better align charges with stormwater runoff contribution. In addition, supported development of cost-of-service based wastewater rates by assisting with allocation of system costs and evaluation of revenue recovery across customer classes. This work helped the District to implement rates that more accurately reflect cost causation and industry best practices.

Stormwater Rate Study | City of Brighton | Brighton, CO | Stormwater Subject Matter Expert
Supported the City of Brighton in conducting a comprehensive stormwater revenue sufficiency analysis, incorporating multiple capital funding sources including contributions from the Mile High Flood District. Assisted in evaluating long-term financial requirements to support system operations and capital improvements. Additionally contributed to the calculation and update of the Stormwater Plant Investment Fee (PIF), ensuring that development-related charges appropriately reflected the cost of expanding system capacity and aligned with industry best practices.

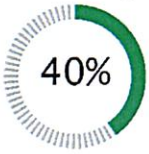
Water, Sewer & Stormwater Cost-of-Service Studies | City of Ann Arbor | Ann Arbor, MI | Lead Consultant
Kyle served as the lead consultant for this Study. He worked with the client and stakeholder group to identify the revenue requirement of the stormwater utility. Additionally, this project utilized significant scenario management in order to demonstrate the fiscal impacts of multiple programmatic enhancements that were contemplated during the study. As such staff and stakeholders were able to review the revenue implications of their collective choices in real-time. The study additionally included cost of serve and rate design aspects to round the analysis.

Water & Wastewater Financial Planning, Cost Allocation, and Rate Design Services | JEA | Jacksonville, FL | Principal Consultant
Kyle served as the principal consultant for JEA's cost of service study. The study calculated the cost of service for JEA's water and sewer customers, utilizing JEA's extensive automated meter infrastructure (AMI). This allowed for a deep understanding of customer behavior to be attained and used in the study. The results of which notably allowed for the pricing of inclining block tiers based purely on the cost of service and system development fees to full price the level of service being provided to irrigation customers. JEA also subscribes to a one water philosophy, which was reflected in the unique cost of service by combining reclaimed service with potable water cost though a detailed mapping of functions. In this way the ultimate fees reflected the total cost cycle to deliver water in JEAs service area.

Cost of Service Study | Northeast Ohio Regional Sewer District | Cleveland, OH | Stormwater Subject Matter Expert
Led the evaluation and development of alternative residential stormwater rate structures, including the introduction of a fourth impervious area tier and a measured billing option for larger single-family homes. Conducted detailed analysis of revenue stability, customer bill impacts, and alignment with cost-of-service principles to inform policy decisions. Additionally, a comprehensive revenue sufficiency analysis for the Stormwater Utility Fund, assessing long-term funding needs and ensuring the proposed rate structures supported sustainable operations and capital investment.

Comprehensive Utility Cost of Service Rate Study | City of Columbia | Columbia, MO | Consultant
Kyle served as a Project Consultant on a recent update to a comprehensive stormwater and sewer cost of service rate studies for the City. He updated a revenue sufficiency analysis in order to develop a multi-year plan of rate revenue increases to satisfy the annual operating, debt service, and capital requirements of each utility as well as maintain adequate operating reserves. He then reviewed the rate structure (including evaluation of rates for wholesale users) and developed recommended modifications to ensure that the rates conformed to accepted industry practice and reflect a fair and equitable distribution of system costs.

Availability



Carol Malesky

Senior Principal | Cleveland, OH | 29 Years Experience

Project Role: Rates, Policy & Affordability

Education:

MS, Agricultural & Resource Economics, Colorado State University, Fort Collins, CO, 1995

BS, Applied Economics & Business Management, Cornell University, Ithaca, NY, 1992

Registrations / Certifications / Memberships:

Member, American Water Works Association

Member, Water Environment Federation

Carol has 29 years of expertise assisting water, wastewater, and stormwater utilities with financial analyses. She has managed dozens of utilities financial planning, impact fee, and rate studies for utilities ranging from small water companies to large municipalities. She's also successfully facilitated workshops with multiple stakeholder groups. Carol has presented before numerous utility boards and city councils and has contributed to various rate manuals produced by the American Water Works Association (AWWA) and Water Environment Foundation (WEF) rate committees, including the WEF green infrastructure implementation manual and is currently a chapter lead for the new AWWA system development charge manual. As an economist, Carol strives to apply sound economic principles to management and financial consulting challenges for her water and wastewater industry clients. Working at Stantec focuses her abilities and the abilities of her team to best address clients' specific financial challenges from an economic perspective rather than an engineering perspective—she relies on the engineering team for that expertise. As project manager, Carol focuses on delivering the highest quality service in response to her clients' specific needs. She has dedicated to delivering useful tools for clients that help them not only during the current study but also lasting into the future.

Utility Rate & Financial Consulting Services | Toho Water Authority | Kissimmee, FL | Financial Services Manager

Carol has managed a wide range of financial consulting services for Toho. These services include helping Toho proactively manage long-term rate revenue impacts of its operational costs and capital improvement program funding through revenue sufficiency analyses. She managed the team that prepared system development charges and policy changes to equitably recover growth-related costs from new customers. Carol also helped measure affordability key performance indicators and review Toho's customer assistance program options to enhance equity and affordability. Over the past few years, she has helped prepare financial modeling tools for Toho to evaluate the financial feasibility of integrating another utility's water and wastewater systems, which is currently in the implementation phase.

Cost-of-Service Rate Study & Affordability Analysis | Northeast Ohio Regional Sewer District | Cleveland, OH | Project Manager

Carol managed the development of strategies to eliminate, mitigate, and/or avoid the impediments to a plan of continuous future rate adjustments. While user rates were evaluated from a cost-of-service perspective, the largest task was to develop strategies to directly confront the issue of affordability. Carol presented results before numerous senior staff meetings as well as Board workshops to assist the District in its understanding of affordability in tandem with rates. Carol assisted with public focus groups and surveys soliciting customer feedback on preferences for services. She managed the analysis and compilation of observations regarding the research on a better understanding of affordability of wastewater service in Northeast Ohio and the greater Cleveland area.

Water, Reclaimed Water, & Wastewater Cost-of-Service, Rates and Fees Study | City of Flagstaff | Flagstaff, AZ | Project Manager

Stantec completed a comprehensive financial planning, cost of service, and rate design study for the City of Flagstaff Water Services. Carol served as the project manager for the 18-month study. Work included workshops with Water Services, the Water Commission, and City Council. Numerous alternative rate scenarios were evaluated with Staff and City Council. Carol also facilitated rate review sessions with the City's largest utility customers to assist in communicating the methodologies and results to those users most impacted by the results.

Rates & Fees Study, Financial Review Services | Town of Castle Rock | Castle Rock, CO | Project Manager
Initially, Carol managed the comprehensive water, water resources, stormwater, and wastewater rate and fee study, including system development fees, water resource fees, long-term financial plans, cost-of-service rate models, and water budget rate structure development. The stormwater development impact fee and rate calculation included a thorough review of impervious areas and costs of service. Carol completed annual updates to rate and fee studies including incorporating a new financial accounting system with chart of accounts, presented findings before Town Council, and participated in defending the fee approach before the Home Builders Association. Recently, Carol led financial review services for CRW during its annual rates and fees study, providing policy, data, and methodology review.

Cost-of-Service Rate Study | Mobile Area Water and Sewer System | Mobile, AL | Project Manager
Carol managed a comprehensive cost-of-service study focused on wholesale customer rates. She also provided quality control and guidance in preparing a long-term financial planning framework for Mobile Area Water and Sewer System (MAWSS) in response to findings of a gap analysis. She assisted the team in workshops with Finance Committee members and MAWSS staff that facilitated long-term financial planning, explicit capital budgeting and reporting, concise reporting, timely Board input into budgeting, and allocations of costs between water and wastewater. Key performance indicators such as percentage reduction in O&M from prior years, revenues versus budgeted revenues by month, actual capital and expenditures versus budget are used to track the framework's effectiveness. Carol continues to manage the analysis of funding options for MAWSS' Master Plan.

Capital Planning, Financial and Funding Services | City of Englewood | Englewood, CO | Project Manager
Carol has completed water and wastewater system connection fee analyses, financial planning, and cost-of-service rate studies for the City since 2019. She evaluated approaches to funding significant capital needs, including assisting the City with a successful WIFIA loan application. To allow for improved equity in the City, she helped evaluate alternative approaches to customer assistance programs and implementation of available funding. She manages on-going analyses of the City's rates to adjust for changes in costs, consumption, and revenues.

Water & Wastewater Rate Study | City of Englewood | Englewood, CO | Project Manager
Carol managed the first rate study for the City's water and wastewater funds in nearly 10 years. Tasks included developing long-term financial planning models, costs of service by customer class, and recommended rate increase schedules to support the City's operating and capital needs. As one strategy to fund significant capital improvements was needed for the regional South Platte Renew wastewater treatment facility, and to lead service line replacements and other water and sewer needs, Carol assisted the team in the financial elements of applying to the Federal WIFIA program. She continues to provide as-needed financial services to the City.

Water & Wastewater Cost-of-Service Rate Study | Albuquerque Bernalillo County Water Utility Authority | Albuquerque, NM | Project Manager
Carol led the effort to help the Authority reach its water conservation goals by developing a new rate structure. She also helped the Authority revise its reuse water rates as part of its Water Resources Management Strategy and developed a long-term financial plan for its water and wastewater utilities. She continues to provide on-going support to develop utility expansion charges and asset valuations, wholesale water rates, and updating the cost-of-service models for water and wastewater rate development. Recent challenges facing the Authority include funding aging infrastructure needs and communicating the need for increased user rates as a result to the Authority's stakeholders.

Financial Capability Assessment Update | City of South Bend | South Bend, IN | Project Manager
Carol managed the financial analysis and the revised financial capability assessment for the City's negotiations with the Indiana Department of Environmental Management on its combined sewer overflow long-term control plan. The analysis included alternative residential indicators and assessment of financial burden on the City's customers given alternative capital improvement programs.

Financial Capability Assessment | Town of Bridgewater | Bridgewater, MA | Project Manager
Carol managed the financial capability assessment (FCA) for the Town's wastewater treatment facility upgrades mandated by USEPA. In addition to the traditional calculations, Carol led the compilation of specific data regarding the Town's customers, flows, revenues, and billing data as required in the Town's Administrative Order on Consent.

Availability

Joey Murphy, PROSCI

Principal Consultant | Mobile, AL | 30 Years Experience

Project Role: Organizational Structure

Education:

Water & Wastewater Leadership Academy, University of North Carolina, Chapel Hill, NC, 2010

MA,; Business Administration, Troy University, Troy, AL 2001

BA, Business Administration, Troy University, Troy, AL, 1998

Registrations / Certifications / Memberships:

Certified Change Practitioner, PROSCI , PROSCI, AL, 2026

Leadership Academy Class, Institute for Georgia Environmental Leadership (IGEL), Atlanta, Georgia, United States, 2017

Water & Wastewater Leadership Academy Level II, Georgia Association of Water Professionals (GAWP), Marietta, GA, 2016

Georgia Qualified Water Loss Auditor (QWLA), Georgia Association of Water Professionals, Marietta, GA, 2016

Member, American Water Works Association

Member, Water Environment Federation

Member, American Water Works Association (Florida)

Member, Alabama Water Environment Association

Member, Georgia Association of Water Professionals

Member, American Water Works Association (Alabama-Mississippi)

With over 30 years in the water and wastewater industry, Joey has developed a robust skill set that spans operational management, maintenance, planning and scheduling, governance and financial management. His expertise includes financial planning, asset management, program management, management practices development, water loss abatement, business process evaluation and improvements, work management system implementation planning, and strategic and performance management.

Organizational Assessment - Environmental Compliance Group* | Orange County Utilities | Orlando, FL | Assessment Author

Performed interviews with multiple utility staff related to the Environmental Compliance Division. Developed and deployed a survey tool to collect benchmarking data to compare performance against other utilities. Developed a comprehensive action item roadmap outlining improvement items. Developed a Key Performance Indicator tracking tool to monitor and report Division performance.

Organizational Assessment* | Henry County Water Authority | McDonough, GA | Project Manager

Project Manager for assessing the Supervisory Control and Data Acquisition (SCADA) Division with the Water Sewer Operations Maintenance (WSOM) group. The project included staffing alignment with other vital functions, incorporating industry best practices and standards, developing a career ladder for advancement opportunities, and cross-training recommendations. This project developed a blueprint for a phased alignment and career planning to meet the organization's long-term strategic goals and objectives.

Computerized Maintenance Management System (CMMS) & Maintenance Assessment* | Renewable Water Resources (ReWa) | Greenville, SC | Project Manager

Project Manager for assessing the Instrumentation and Electrical (I&E) Department within the Operations Division. The project included conducting a staffing and organizational structure analysis, developing a career advancement plan for I&E staff, updating the team's skills inventory, and developing a programmatic work management strategy with a detailed review of the CMMS/EAM Implementation (Cityworks). This project developed an improvement roadmap to ensure the CMMS and I&E team's resiliency and sustainability into the future.

Organizational Assessment* | Jefferson County | Birmingham, AL | Project Manager

Member of the diagnostic team developing the functional organization for the Environmental Services Department (wastewater system). This functional organization identified the key functional aspects of the wastewater utility and laid out the interactive relationships between them to complement a planned realignment and reorganization.

Smart Metering Program * | Macon Water Authority | Macon, GA | Program & Project Manager
Program Manager for Macon Water Authority's smart metering program. Managed all aspects of the program from initial requirements gathering, system integration specifications, funding, bid and contract development for metering infrastructure and contract implementation services (in addition to in-house resources). Worked with Macon's internal legal and communication groups to develop communication vehicles for customers in multiple media formats (flyers, bill inserts, web, etc.). Developed and deployed the execution strategy for the multiple parties (Meter Reading, Meter Services, Contractor, Meter Manufacture, Information Technology, Customer Service, etc.) to ensure seamless integration with current work practice.

Comprehensive Training Program* | City of Oxnard Water Department | Oxnard, CA | Project Manager
Assisted the City of Oxnard Water Division with developing a comprehensive training program that addresses both short-term and long-term needs. The program and corresponding reports distinguished between regulatory compliance and technical training (including safety training) and broader level management and leadership training.

Wastewater Decentralization Study* | Madison County | Huntsville, AL | Project Manager
Project Manager for decentralized wastewater study for rural Madison County, overseeing all aspects of the project from inception to completion. Evaluated continued use of on-site septic systems (septic tanks) and decentralized system alternatives and prepared recommendations.

Performance Management* | Loudoun County Sanitation Authority | Ashburn, VA | Project Manager
Developed and evaluated current performance activities compared to industry best management practices and AWWA QualServe benchmarks. The initial phase was designed to identify current performance gaps and areas for improvement and evaluate tracking requirements.

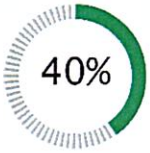
CMMS Gap Analysis, Connecticut* | The Metropolitan District | Hartford, CT | Project Manager
Conducted maintenance system gap analysis and pilot project to configure SAP PM to validate functionality and incorporate best maintenance management procedures and practices.

Acquisition Assistance* | Harford County Department of Public Works | Harford, CT | Project Manager
Assisted client with documentation (Technical and Cost Proposal) for privatization effort for Aberdeen Proving Grounds and Edgewood Area, Maryland Army Installation.

Capital Connection Fee Assessment | City of Marshall | Marshall, MI | Project Manager
As Project Manager, Joey led the development of the City of Marshall, MI Water and Sewer Connection Fee Study – a comprehensive evaluation of the City's water and wastewater capacity fees to ensure equitable, defensible, and sustainable cost recovery for new development. The study applied industry best practices and American Water Works Association (AWWA) methodologies to assess the value, capacity, and level of service of the City's utility infrastructure. Working closely with City staff, the project team evaluated existing assets, planned capital improvements, system capacity constraints, and growth-related investments, culminating in a combined buy-in and incremental capacity fee approach that fairly allocates costs based on actual system usage and long-term capital needs.

Utility Condition Assessment Program | Massachusetts Port Authority | Boston, MA | Programs Manager
As the Programs Manager, Joey is supporting the Massachusetts Port Authority (Massport) through the MICA 2026 program to advance authority-wide utility asset management, data integration, and capital prioritization. This work focuses on strengthening the foundation for long-term, data-driven decision-making by aligning utility condition assessments, asset registries, and capital investment planning with Massport's broader digital transformation initiatives. Working closely with Massport and partner consultants, Joey is helping to coordinate program management, change management, and technical alignment across multiple workstreams to ensure utilities are fully integrated into the MICA 2026 vision and roadmap. Key efforts include developing a standardized utility data framework that integrates GIS, condition assessment, and asset classification standards; improving the quality, consistency, and governance of utility asset data; and linking infrastructure condition and criticality directly to capital planning and prioritization. The work also supports single-source access to information, improved data workflows, and alignment between utility assessments and Massport's capital improvement program. Together, these efforts are enabling Massport to move away from fragmented, manual processes toward a more integrated, transparent, and scalable approach that improves risk management, supports informed investment decisions, and positions the Authority for sustained operational resilience across its diverse facilities.

Availability



Emily Snyder

Principal | Asheville, NC | 20 Years Experience

Project Role: Grants

Education:

MA, Regional Planning, University of North Carolina, Chapel Hill, NC, 2006

BA, Urban & Environmental Planning, University of Virginia, Charlottesville, VA, 2004

Emily is a capital planning and funding specialist focused on supporting capital improvement programs and complex projects. With over 18 years of experience in capital projects and government, she understands the financial challenges facing cities and utilities in maintaining and expanding their infrastructure to meet the needs of today and tomorrow. Emily assists clients with capital improvement program management, finance and funding strategies, and the grant management lifecycle including identification, application, and compliance. She has supported communities, both small and large, with traditional funding and financial tools, as well as the opportunities supported by the Bipartisan Infrastructure Law (BIL) and Inflation Reduction Act. Her experience and success ranges from USDOT to EPA's WIFIA and SRF programs to DOE hydropower investments to many other grant programs across all types of infrastructure. Emily is passionate about the physical infrastructure that serves our communities and the on-going, funding puzzles required to get projects into construction.

Prior to joining Stantec, Emily worked in numerous roles for the City and County of Denver, including 9 years with the Department of Transportation and Infrastructure and 4 years with the Department of Finance. She most recently served as Capital Planning Director, where she oversaw a more than $1 billion capital improvement program.

Grants Program Management Support | City of St. Petersburg | St. Petersburg, FL | Project Manager & Funding Specialist

Stantec is serving as the overall grants program manager for the City of St. Petersburg Public Works Administration division. Emily is project manager and funding specialist, tracking the various grants that PWA is pursuing or implementing. She has developed organizational process workflows and template documents to help establish internal controls and guide staff managing projects through all stages of a grant lifecycle, including grant evaluation, application, agreement, and implementation/compliance phases. Emily has also assisted with funding strategies and compliance on individual projects.

Utilities Capital Improvement Program Funding Strategy | City of Lake Worth Beach | Lake Worth Beach, FL | Project Manager

The City of Lake Worth Beach sits within Palm Beach County and manages drinking, sewer, and stormwater distribution systems. Stantec was hired to review their utilities capital improvement program and design a funding strategy to maximize grant opportunities. Emily served as project manager to develop a tool that could match projects with possible funding sources. She also provided consulting services on what grants may stack together to fully support a project or how multiple projects could be packaged together within one grant application.

Wastewater Funding Strategy for Resilience Improvements | Miami-Dade County Water & Sewer Department | Miami, FL | Funding Specialist

Stantec led the architectural planning study and conceptual design of a Storm Shelter and Primary Control Center (the Project) for WASD's Central District Wastewater Treatment Plant (CDWWTP), as well as design for a Storm Shelter at their Pump Station 2 facility. Emily served as a funding specialist evaluating potential federal and state funding in the areas of disaster mitigation, climate and coastal resilience, wastewater systems, and cybersecurity and energy infrastructure. She created a dynamic matrix that supports and responds to future decisions in the project development, as well as inform options for other WASD facilities.

Bicycle and Pedestrian Plan Funding | City of Sunrise, FL | Sunrise, FL | Implementation Specialist
Emily supported development of the funding and implementation chapter of the update to the City's bicycle and pedestrian plan. Responding to the City's desire to move quickly from "plan" into "implementation," Emily provided recommended organizational and delivery strategies on where to start and eventually program the pedestrian and bicycle program. It focused on low-cost, quick win improvements to larger, complex projects; and the timing, partnership, and funding considerations to get into construction.

Grant Support Services | Springfield Water and Sewer Commission | Springfield, MA | Funding Specialist
Funding Specialist who assisted the Commission with application and award of a $5M grant from the DOE for energy efficiency upgrades to the Cobble Mountain Hydropower Station. Managed the development of over 17 required technical and compliance documents, including the drafting of a Community Benefits Plan. Emily has continued to provide consulting support to SWSC through the award negotiations with DOE to help secure the funding for use on the project.

Water WIFIA | Santa Clarita Valley Water Authority | Santa Clarita, CA | Project Manager
Project Manager and funding specialist who assisted Santa Clarita Valley Water Agency through the Letter of Interest and Application process for a $350M Water Infrastructure Finance and Innovation Act (WIFIA) loan on SCVWA has a $1B capital improvement program to upgrade and expand their infrastructure to improve the reliability and resiliency of the drinking water supply. Emily supported SCVWA through development of their WIFIA capital program, including environmental review requirements and compliance support.

Section 247 Maintaining and Enhancing Hydroelectricity Incentives Program Grant | Northern Indiana Public Service Company | Monticello, IN | Funding Specialist
Funding Specialist who supported NIPSCO with the two successful grant applications to the Department of Energy (DOE) for dam safety improvements, including replacement of stoplogs, spillway gates, and associated superstructures, for NIPSCOs Oakdale and Norway dams. Emily managed the narrative writing of the required technical and compliance documents, including the drafting of a Community Benefits Plan which included recreation amenities to be delivered with the project NIPSCO was awarded $9.8M of the $10M requested.

Drinking Water State Revolving Fund Loan | City of Englewood | Englewood, CO | Funding Specialist
The City of Englewood was undertaking replacement of all lead service lines across their service area, an effort totaling $40 million over 3-4 years. Emily was the project manager and funding specialist for loan application to the State of Colorado's Drinking Water State Revolving Fund. This effort included facilitation of a multi-disciplinary team for management and compliance with the SRF process, application development, and negotiations. The City of Englewood was successful in securing a low-interest loan, including $10 million of principal forgiveness from Bipartisan Infrastructure Law funds, for the full project cost. Emily continues to support the City of Englewood on compliance efforts related to the loan.

PFAS Grant Application | City of Englewood | Englewood, CO | Funding Specialist
Funding Specialist who assisted the City of Englewood with securing $400,000 for PFAS sampling and infrastructure projects from the Colorado Department of Public Health and Environment. Facilitated review and completion of all grant application documents and continues to assist the City with implementation and administration of the grant funding through delivery of the projects.

USDOT Innovative Finance & Asset Concessionaire Grant | Colorado Department of Personnel and Administration (DPA) | Denver, CO | Grants Consultant & Project Manager
While serving as the grants consultant for DPA's P3 Office, Emily authored and led the effort to apply for a first-of-its-kind technical assistance grant from USDOT Build America Bureau. Emily was successful in helping DPA secure $717,600 to perform a two-phase asset scan of underutilized real property for transformation into mixed-use, affordable transit-oriented development, including both affordable and workforce housing options. The first phase would include confirmation of TIFIA-eligibility; high-level feasibility review of the properties for mixed-use, affordable TOD; and prioritization of viability for use of asset concessions. The second phase includes a more detailed evaluation, such as market studies, zoning review, cost and revenue estimates, and governance models. The asset scan will assist DPA in accelerating deployment of their public-private partnership program by augmenting their organizational capacity to assess their available properties for joint development.

Availability

Amy Clore, PMP, DBIA

Project Manager | Tampa, FL | 22 Years Experience

Project Role: Development Services

Education:
BS/BSc, Civil Engineering, Purdue University, West Lafayette, IN, 2003

Registrations / Certifications / Memberships:
Design Build Institute of America (DBIA), Associate, 2025
Project Management Professional, PMI, 2015

Amy has been a Stantec project manager since 2008 and has developed strong organizational and communication skills for coordinating project delivery. She relocated to Stantec's Dallas office in 2015 after spending nine years working in Stantec's New Zealand business. Delivery to budget and schedule and active risk management have been fundamental competencies demonstrated in this role. Amy's project experience has included policy and environmental management, permitting and assessment of environmental effects, water and wastewater conveyance projects ranging from feasibility studies and preliminary design through to detailed design, and dam safety investigations.

Contribution in Aid of Construction (CIAC) Program | Toho Water Authority | Kissimmee, FL | Program Manager
Amy has worked with Toho Water for the past five years across a range of projects, including starting up and implementing the CIAC Utility Line Extension Program. Toho created the CIAC program to implement their CIAC financial policy and incentivize the local builder community to lead the development and construction of local water and sewer utility lines. Amy worked closely with Toho staff to lead the program start-up and on-going operation, including aligning various internal Toho departments around the program objectives and needed engagement, development of various tools, and stakeholder outreach (various initial and ongoing initiatives). Some examples of these efforts include Amy creating a multi-criteria assessment process for evaluating Builder proposals, facilitation of recurring virtual builder meetings, and bringing in other Stantec expertise to support Toho as an extension of staff.

Developer Charge Implementation Plan | New York Department of Environmental Protection (NYDEP)| New York City, NY | Development Services
NYDEP was evaluating approaches for implementing a developer charge to support residential development demands. Amy was brought into the project team to advise on Toho Water's experience starting up and implementing their CIAC program. The Toho Water Case Study summarized various information NYDEP could use as lessons learned and incorporate into their proposed developer services efforts across initiation and start-up through implementation. This effort included various client calls to align scope expectations and a final summary memo.

Various Other | Toho Water Authority | Kissimmee, FL | Project Manager
In addition to the CIAC Program (above), Amy has supported Toho Water with various other advisory and development support activities over the past few years, including the Sunbridge acquisition and St Cloud Utility Integration transition support projects. ***Sunbridge Acquisition*** – Amy supported Toho with the acquisition and integration of the Sunbridge development water and wastewater systems into Toho Water. Amy supported the Stantec team to prepare the summary and meet requirements of Florida Statute Section 189.054, and continues to coordinate the Sunbridge Advisory Committee group bi-annual meetings and reporting across the acquisition agreement requirements. ***St Cloud Utility Integration*** – Amy supported Toho's Project Manager for the City of St Cloud Utility Integration in implementing the Transition Plan, coordinating with internal Functional Groups with actions and deadlines needed for a successful transition.

Three Waters Management Planning | Hamilton City Council | New Zealand | Project Manager
As Project Manager, Amy worked with HCC to develop an integrated 3 Waters Management Plan (3WMP). This will provide Action Plans for HCC to manage and implement wastewater, water supply and stormwater activities on an on-going basis. The work aligns with a Sub Regional Three Waters Strategy developed under Future Proof which MWH has developed, and is implementing, a methodology for drafting HCC's Action Plans that will address Sub Regional Three Waters Strategic Issues in a context appropriate for Hamilton.

Cedar Ridge Reservoir EIS | US Army Corps of Engineers - Fort Worth District | Abilene, TX | Project Engineer
Amy is part of the team delivering the Cedar Ridge Reservoir 3rd Party Environmental Impact Statement (EIS) review on behalf of the City of Abilene. Stantec is contracted by Abilene, however we take technical direction from the USACE Fort Worth District. Amy's responsibilities include being the main liaison between the third party contractor team and Abilene, developing the public involvement plan and overall project workplan, serving as project recorder for all meetings, and acting as the subconsultant liaison. The scope of services includes public scoping meetings, review and verification of applicant-provided information, and development of additional information to support a defensible statement of purpose and need, reasonable range of alternatives, evaluation of environmental effects, and preparation of a Draft and Final EIS in support of a Clean Water Act Section 404 permit. Future work will include attendance at the public and tribal scoping meetings as well as support to develop the draft Purpose and Need statement.

Environmental Performance Assessment - Tauranga/Western Bays network (MWH) | NZ Transport Agency | New Zealand | Project Engineer
Worked with MWH team to undertake an environmental performance assessment of the Tauranga/Western Bays network maintenance contract, in-line with the assessment materials developed under an environmental assessment of the Auckland South network. The assessment looked at the compliance of network maintenance activities against various legal requirements, as well as the organizational lines of communication around environmental management issues. Coordinated and participated in interviews between network contract team and MWH. Drafted summary report which included a range of recommendations for continued improvement.

Barry Rose Wastewater Treatment Plant Upgrade – Phase 1 | City of Pearland | Pearland, TX | Permitting Support
Amy assisted with the permitting requirements associated with expanding the existing wastewater treatment facility from 4.5 MGD to an approximate 8.5 MGD plant. Her responsibilities to-date include: drafting permitting chapter for 30% design report that outlines permitting strategy and TCEQ's major amendment requirements for a TPDES permit, pre-application meeting with TCEQ staff, and she authored a white paper on Texas' Clean Water State Revolving Fund (CWSRF) program and how it works. Future work in Phase 2 will include the major amendment work for the site's TPDES

Tinker Air Force Base Utility Privatization | Oklahoma City Water Utilities Trust | Oklahoma City, OK | Project Manager
Amy took over as the project manager for the Tinker Air Force Base (AFB) Utility Privatization project. Stantec assisted OCWUT to submit a proposal to the federal government to take over the ownership and operation of the Tinker AFB wastewater and water supply systems. The team is waiting for federal negotiations to begin. Amy's responsibilities include managing the project schedule, budget and sub-consultant performance. Future work will include managing a six-month transition phase and a five-year performance phase.

Program Management | Hamilton City Council | New Zealand | Project Manager
Amy project managed a program of work with Hamilton City Council for on-going planning and engineering assistance. Her role included coordinating projects, ensuring MWH staff availability, agreed scope of services and delivery timeframes were all met, proactive variation management and on-going liaison with HCC project representatives. Some of the projects included the District Plan Review, Technical Specifications Review, MWH's involvement in RPV6, Water Chapter for the District Plan, Urban Design Assistance to the District Plan and the Rototuna Structure Plan.

BRA IDIQ | Brazos River Authority | Texas | Project Controls
Amy has supported Stantec's project controls for various task orders under the existing dam safety IDIQ contract with the BRA since 2015. Her responsibilities have included supporting the delivery team with scope and fee development, budget and schedule tracking, and client invoicing and reporting.

Availability

60%

Jeff Rackley, MBA, PMP

Manager | Tallahassee, FL | 22 Years Experience

Project Role: Miscellaneous Fees

Education:
MBA, Florida State University, Tallahassee, FL,, 2004
BS, Accounting, Florida State University, Tallahassee, FL, 2002

Registrations / Certifications / Memberships:
Project Management Professional #430316, Project Management Institute, Newtown Square, Pennsylvania, United States, 2006

Jeff is a certified Project Management Professional with 22 years of governmental rate consulting, grants management, and budget analysis experience. Jeff currently acts as a Manager in the Management and Technology Consulting team and has managed over 100 rate consulting and revenue enhancement projects for government clients throughout the State of Florida.

Utility Rate Consulting Services | Pinellas County Utilities | Clearwater, FL | Project Manager & Technical Lead
Jeff served as the Project Manager for Pinellas County's 2025 comprehensive utility user fee study update, building on the County's original 2022 analysis. Jeff led the work effort, overseeing the reassessment and update of more than 150 utility-related fees, including miscellaneous service charges, water impact and sewer connection fees, fire protection charges, and overhead cost allocation rates. He directed detailed cost analyses, process reviews, and local benchmarking to ensure fees accurately reflect current service delivery costs and industry standards.

Miscellaneous Utility Fees Study | City of Atlanta | Atlanta, GA | Project Manager
As a part of Stantec's ongoing Program Management Services with the City of Atlanta's Department of Watershed Management, Jeff was an integral part of the Stantec team tasked with the development and updated calculation of approximately four hundred separate miscellaneous utility fees. Jeff was primarily responsible for leading the data collection efforts, coordinating City personnel and the Stantec program staff, guiding the team of analysts in creating and populating calculation models for the various fees and documenting the results of the analysis in a technical memorandum for the Department.

Utility Revenue Sufficiency Analysis | City of Cocoa | Cocoa, FL | Project Manager
Annually, Stantec assists the City in performing a revenue sufficiency analysis to develop a multi-year financial forecast and financial plan to provide the City with the information necessary to meet their financial goals and comply with financial policies and regulations. As part of the Stantec team, Jeff assisted with project scheduling, coordination for data collection, scheduling, resource allocation, quality control coordination and creation and delivery of presentations, reports, and deliverables.

Solid Waste Assessment Study | City of Port Orange | Port Orange, FL | Project Manager
Jeff served as a Project Manager as he assisted with updating the City's non-ad valorem special assessment to recover the costs of providing solid waste collection and disposal services. Jeff attended multiple client workshops and public hearings and was able to collaborate with the client to develop a funding solution to meet their financial goals while achieving community acceptance and legal sufficiency.

General Fund Financial Sustainability Analysis | City of Cocoa | Cocoa, FL | Project Manager
Stantec conducts a financial sustainability analysis for the City of Cocoa's General Fund on an annual basis. Jeff provided the overall project management activities necessary to perform the analysis for this fiscal year and to update the resulting multi-year financial management plan. This consisted of the coordination of the team of financial analysts to perform the annual revenue sufficiency analysis, including data collection, modeling, interactive work sessions with the client team, presentation of results and documentation of results in a final report.

Fire Assessment Roll Update | Cocoa, FL | Project Manager
Jeff led the annual work effort necessary for updating the fire assessment roll for the City of Cocoa for Fiscal Year 2025. This included managing the schedule, resources and client interaction relating to all project work including obtaining the necessary parcel data form the county property appraiser, necessary data analysis to update the assessment roll, quality control activities and preparation of the technical memorandum to document the process and results of the project.

Stormwater Revenue Sufficiency Analysis Assessment Roll Update | City of Cocoa | Cocoa, FL | Project Manager
Jeff managed the process for the update of the annual revenue sufficiency analysis for the City of Cocoa Stormwater Fund as well as the update of the assessment roll to account for billing unit changes based on new construction and impervious area changes. Jeff served as the project manager with responsibility for the project schedule, coordination of data collection, project status updates, client interactive work sessions, quality control and the creation and distribution of project deliverables by the Stantec team.

Stormwater Assessment Roll Update | City of Bonita Springs | Bonita Springs, FL | Quality Control
The City of Bonita Springs retained Stantec to update their Annual Stormwater Utility Assessment Roll for Fiscal Year (FY) 2024. Stantec performed a change analysis between FY 2023 assessment roll and the property tax data to prepare the FY 2024 assessment roll for the City. Jeff assisted with the overall project management activities associated with the project as well as the roll development and the drafting of the necessary technical memorandum that documents the process and details the results of Stantec's analysis for (FY) 2024.

Stormwater Assessment Roll Update | City of Pinellas Park | Pinellas Park, FL | Project Manager
Jeff served as the Project Manager for the annual update of the City of Pinellas Park stormwater utility assessment roll for Fiscal Year 2025. This included leading the team in conducting a change analysis for the parcel data set received from the Pinellas County Property Appraiser as compared to the City's Fiscal Year 2024 stormwater non-ad valorem assessment roll to identify parcels that are added, deleted, annexed, or have significantly changed impervious area measurements. Jeff was responsible for the overall management of the process including client coordination, collection of necessary data, quality control and the delivery of the preliminary and final assessment rolls and documentation of the project results in a technical memorandum.

Stormwater Assessment Roll Update | City of Palm Bay | Palm Bay, FL | Project Manager
The City retained Stantec Consulting Services Inc. (Stantec) to update and prepare the stormwater billing roll for fiscal year (FY) 2024. The update for FY2024 had two primary objectives as follows: 1) obtain the necessary Brevard County Property Appraiser data, and 2) perform a change analysis identifying the differences between the updated billing roll and the previous year's billing roll. Jeff assisted with the roll development and the incorporation of the City's overrides/changes to create the final billing roll. Jeff also assisted with the drafting of the necessary technical memorandum that documents the process and details the results of Stantec's analysis for (FY) 2024.

Fire Assessment & Solid Waste Assessment Updates | Columbia County | Lake City, FL | Project Manager & Technical Lead
Jeff led Stantec's delivery of two countywide non-ad valorem assessment studies for residential solid waste services and fire protection. Jeff was responsible for the technical analysis, budget evaluation, and multi year financial modeling to support FY 2026 budget planning in compliance with Florida law. He oversaw the development of the assessment methodologies, rate calculations, and full assessment rolls for both programs and also managed statutory first class notice preparation and mailing to affected property owners, ensuring full legal compliance and transparency. Jeff provided overall project leadership, quality control, and client coordination throughout the engagement.

Availability

Lance Price

Data Scientist | Tampa, FL | 12 Years Experience

Project Role: Billing Data

Education:
MS, Data Science, New College of Florida, Sarasota, FL, 2018
BA, Mathematics, New College of Florida, Sarasota, FL, 2008

Registrations / Certifications / Memberships:
Database Application Development and Programming, Atlantic Technical College, Coconut Creek, FL, 2015

Lance is a data scientist with a demonstrated track record of achieving goals and exceeding standards through hard work and determination. His experience includes the classification of impervious surfaces using remote sensing imagery and machine learning; automation and acceleration of workflow with Python scripts; machine learning and NLP (Natural Language Processing) with text data; parallel processing, storage and retrieval of data using SQL; customization and automation of PowerBI visualizations and workflows using Python; and processing of large amounts of automated meter reading data. He is proficient with the following programming languages: Python, R, Scala, SQL, and Spark. Additionally, he has extensive experience with Pandas, SciKit-Learn, Numpy, ArcPy, TensorFlow, Tidyverse, Shiny, and Leaflet, as well as with ArcGIS Pro, PowerBI, Bash, Jupyter, LaTex, Markdown, Microsoft Office, and Hadoop.

Water Main GIS, Asset Management, & Risk Summary | Palm Beach County Water Utilities Department | Palm Beach, FL | Data Scientist
Analyzed and combined various data sources into a single water main GIS line layer that summarizes asset-risk analysis results using the approach provided by Palm Beach County Water Utility Department (PBCWUD). The asset-risk analysis results included criteria related to the asset's likelihood of failure (LOF), consequence of failure (COF) and risk. LOF criteria include past breaks and leaks, age, material and pressure. COF criteria are proximity to sensitive locations, proximity to different road types, number of served customers, duration of damage due to diameter and material, environmental impact, re-pump stations, lines connected to pump stations, and pipeline redundancy. LOF and COF criteria were combined into total LOF and COF and normalized by max possible LOF and COF. Total risk and normalized risk were calculated. Rankings were created for LOF, COF and Risk to easily filter top pipes with the most risk. The final GIS line layer was used as input for a dashboard that quickly filters on various attributes and zooms in on the riskiest lines to prioritize in future Capital Improvement Plans (CIPs).

Stormwater Billing System Maintenance Automations | City of St. Petersburg | St. Petersburg, FL | Data Scientist
Responsible for the development of various ArcGIS Pro and Python scripts and toolboxes that automate repeatable processes and ensure data integrity and reliability of a Stormwater billing system that is built on a continuously-updated impervious surface layer. The scripts included: 1. Automatic calculations of various attributes after manual edits are made to the impervious surface 2. Automatic csv file export that is fed into the NaviLine billing system. The toolboxes included: 1. Automatic updates of various attributes after manual updates to the impervious surface layer and an automatic report of the various changes that can be sent to interested parties 2. Automated quality control checks that identify various inconsistencies and broken rules in the data. After the quality control tool is run, many of the identified errors can be corrected with the other scripts and toolboxes that were created.

Stormwater Billing Data | City of Fort Lauderdale | Fort Lauderdale, FL | Data Scientist
Responsible for transformation of parcel data into a GIS and RDBMS that was used to create billing rates for customers. Much of this process was automated using Python scripts. Each year parcel records are compared to the previous year and downstream changes are made to billing table: new/deleted records, updated billing codes, updated square footage, etc.

Cost of Service Study | JEA | Jacksonville, FL | Data Scientist
Responsible for preparation of peaking factor analysis with water AMI (automated metering infrastructure) data. Python and Jupyter notebooks were used for the initial data exploration along with parallel processing techniques to efficiently find customers with complete data from October 2015 to October 2016, aggregate data on customer classes, and find peaking factors for the unique customer classes. Similar process was repeated in 2023.

Stormwater Impervious Surface Mapping | City of St. Petersburg | St. Petersburg, FL | Data Scientist
Responsible for the classification of impervious surfaces using spatial analyst tool in ArcGIS Pro to segment satellite imagery (RGB + Near-Infrared bands) into similar spectral and spatial signatures and then classify segments into various subclasses of impervious and pervious surfaces. The classification process includes supervised and unsupervised classification techniques. Python was utilized to automate much of the process.

Stormwater Impervious Surface Mapping | City of Bonita Springs, Florida | Bonita Springs, FL | Data Scientist
Responsible for the classification of impervious surfaces using spatial analyst tool in ArcGIS Pro to segment satellite imagery (RGB bands) into similar spectral and spatial signatures and then classify segments into various subclasses of impervious and pervious surfaces. The classification process includes supervised and unsupervised classification techniques. Python was utilized to automate much of the process.

Street Light District Billing Database | Pinellas County | Clearwater, FL | Data Scientist
Transform parcel data and funds due for each street light district into a Non-Ad-Valorum billing table to be included in property taxes. Each year various changes are incorporated into the parcel backbone (annexations, splits and merges), billing units are updated, billing rates per unit are calculated based on funds due, and final billing amounts are calculated for each parcel adjacent to street with street lights.

GIS Backflow Data Population | Collier County Board of County Commissioners | Naples, FL | Data Scientist
Responsible for the creation of backflow point features in GIS and merging these new features with existing tabular XC2 data. The features were automatically created with a Python script utilizing many geoprocessing tools in the arcpy library. In addition, most of the matching from GIS point features to the tabular data was automated using an additional Python script.

Lead Service Line Inventory | JXN Water | Jackson, MS | Data Scientist
Lance helped to develop the Service Line Inventory for JXN Water by incorporating service line material information from parcels, Utility Network, work orders, potholing program, and other supporting data. Lance also helped to maintain quality control and consistency with many interacting attributes. Lance has become an expert on the various required data schemas in multiple jurisdictions/states including Mississippi to stay in compliance with LCRR (Lead and Copper Rule Revisions) and LCRI (Lead and Copper Rule Improvements) federal regulations as well as the state's regulating body.. Most of the work was done using Jupyter/Python Notebooks with ArcGIS Pro that keep track of the various updates over the years. These notebooks are the method/software used to perform the actions, and they also contain Markdown language, which is used to create formatted text as notes and explanations of what was done. The notebooks also help with repeating similar processes as input data changes over time.

Cost of Service & Rate Design | City of Bismarck | Bismarck, ND | Data Scientist
Responsible for preparation of peaking factor analysis with water AMI (automated metering infrastructure) data. Python and Jupyter notebooks were used to transform raw XML data into tables, perform initial data exploration, use parallel processing techniques to efficiently find customers with complete data, aggregate data on customer classes, and find peaking factors for the unique customer classes.

Availability

Nadia Vogt

Senior Advisor | Mequon, WI | 16 Years Experience

Project Role: Stakeholder Engagement

Education:

MA, Urban Environmental Geography, University of Wisconsin, Milwaukee, WI, 2010

BA, History & Sociology, University of Wisconsin, Milwaukee, WI, 2006

Registrations / Certifications / Memberships:

Member, American Society of Adaptation Professionals

Vice-Chair of Sustainability, American Public Works Association (Wisconsin Chapter), 2023

Nadia is an expert in applied strategy and implementation. As an experienced project manager, she has a proven track record of leading multi-sector teams to meet organizational goals supporting climate change, community, and strategic planning. She has successfully worked with all levels of stakeholders to develop plans and programs related to water resource management, climate action, and resilience. The development and implementation of holistic projects from the regional to neighborhood-scale and the integration of culturally appropriate outreach strategies is a lens she brings to all projects. Nadia uses her strong facilitation skills (and professional-level Spanish language skills as needed), to develop shared visions that result in real action for her partners and clients with a focus on where climate, community, and budgets overlap. With an ability to optimize processes, projects, and performance, she combines her skills in plan analysis, alternatives development, and risk assessment. She is passionate about projects that focus on climate mitigation and adaptation, urban planning, public policy, and social and environmental justice. Nadia has dedicated her personal and professional life to improving the places where we live, work, and play for current and future generations.

Process Facilities Program Management | DC Water | Washington, DC | Resilience Lead

Designed a programmatic asset management and resilience framework to prioritize capital improvement projects using screening-level hazard risk assessment scores, enabling evaluation of climate threats, infrastructure condition, budget limitations, and potential project design modifications through a desktop decision-support system.

43rd Street Flood Mitigation Project | Milwaukee Metropolitan Sewerage District | Milwaukee, WI | Stakeholder Specialist

As part of a multi-million dollar urban flood risk reduction engineering project, collaborated closely with lead staff and subconsultants to design and facilitate a complex stakeholder engagement strategy, ensuring alignment of priorities among various municipal landowners. Structured a holistic internship process to support regional and client workforce development objectives.

Point-of-Use and Point-of-Entry Education Strategy | California State Water Board | California | Project Manager

To support the State Water Board prioritized funding and technical assistance to provide safe drinking water, point-of-use (POU) and point-of-entry (POE) devices are the most viable pathway for public water systems to achieve compliance. This process developed a cohesive outreach and educational strategy and associated materials to educate individuals, technical audiences, regulatory and local agencies, domestic well owners, and plumber/operators. Materials were developed in English, Spanish, Hmong, and Punjabi and are available to the State of California.

FEMA Outreach & Communication Plan | Johnson County | Johnson County, KS | Communication Coordination Specialist

Developed a FEMA-compliant outreach and communications plan, defining target audiences, key messages, engagement channels, accessibility requirements, and timelines to support hazard mitigation and disaster preparedness objectives.

Statewide Floodplain Manager Training Program | State Of Iowa Department of Natural Resources | Iowa | Communications Process Developer

Led the development of a comprehensive communications process for a floodplain manager training program, aligning messaging, materials, and stakeholder coordination to effectively convey complex technical and regulatory requirements and support program adoption.

EPA Community Change Grant: Homestead Revitalization, Florida | Homestead, FL | Project Manger
A $20M funding proposal was submitted to the EPA on behalf of four coordinating entities. As Project Manager, Nadia designed and facilitated the project approach, developed all coordinated scopes of works and associated detailed budgets, and managed all communication between partners, client, and the EPA representative. This project will build resilience for a disadvantaged community plagued by flooding, hurricanes, and historic disinvestment. Through the redevelopment of a key urban corridor, investments will build out multi-modal transportation, develop green spaces, reduce pollution, create a climate resilience hub, underground critical utility lines, and expand workforce development partnerships to support a climate ready workforce.

Maximizing Stormwater Capture Using Green Infrastructure In The Combined Sewer Service Area* | US Army Corps of Engineers, City of Milwaukee, and Village of Shorewood | Southeastern Wisconsin | Project Manager
Nadia led the planning effort and development of planning approach, stakeholder coordination, consultant management, data management and evaluation, and plan writing. This effort was done in collaboration with the US Army Corps of Engineers, City of Milwaukee, and Village of Shorewood. The resulting projects used data to develop a replicable approach to proactively identify strategic locations for large-scale green infrastructure and provide conceptual design and cost-estimates to be able to provide a long-term financial forecast to support implementation.

EPA Comprehensive Climate Action Plan: Southeastern Louisiana | Regional Planning Commission | Louisiana | Project Manager
Nadia led the Stantec team developing the Comprehensive Climate Action Plan (CCAP) for the Regional Planning Commission, funded by the EPA's Climate Pollution Reduction Grant. Covering eight parishes, the plan was built on analyses and recommendations including updating the GHG inventory, projecting GHG emissions, setting reduction targets, and identifying quantified reduction measures. Stantec also led extensive outreach and engagement, maximizing participation access for low-income and disadvantaged groups as well as coordinating with nearby tribes.

Engagement For Low Impact Design Ordinance | City of Tucson | Tucson, AZ | Stakeholder Engagement Lead
As the City of Tucson developed a Low Impact Development Ordinance, external public entities were identified to solicit information about drivers, process, and outcomes of existing stormwater regulations. Nadia developed and facilitated a detailed process that resulted in a comprehensive list of recommendations and strategies to be considered as best practice for the client that were integrated into the development of the final stormwater ordinance.

Floodplain Re-Mapping | City of Lincoln | Lincoln, NE | Public Consultation & Engagement
Led the development of a Global Community Outreach Plan for the City of Lincoln, NE. This Global Community Outreach Plan Framework enabled City project partners to collaborate on a unified outreach strategy, informing stakeholders about FEMA flood map updates, potential impacts, and mitigation actions for a climate-resilient future. This Plan was accepted and approved by FEMA.

EPA Community Change Grant | City of North Miami | North Miami, FL | Grant & Client Lead
Led development of a $20 million grant proposal to reduce pollution and increase climate resilience in disadvantaged communities. The project delivered a 27-acre mixed-use development—including Claude Pepper Park—serving a predominantly Haitian community, with integrated brownfield redevelopment, energy-efficiency retrofits, and neighborhood-scale resilience hubs.

Tree Canopy Assessment | The Nature Conservancy | Maricopa County, AZ | Project Manager
Led a comprehensive policy analysis to identify opportunities and barriers for expanding the urban tree canopy in an arid region. Designed and facilitated a multi-pronged approach, including the creation of a ranking matrix to evaluate governance structures, budgets, policies, species selection, and data analysis. Conducted a gap analysis to pinpoint areas for improvement. Developed a public-facing plan that communicated trends, opportunities, and recommendations for municipalities to enhance their urban tree canopy, aiming to reduce heat impacts and improve air quality.

Availability

Laura Arturo

Sr. Consultant | Coral Gables, FL | 7 Years Experience

Project Role: Consultant

Education:
BS, Finance, University of Florida, Warrington College of Business, Gainesville, FL, 2019

Laura is a Senior Consultant with a background in finance. Laura has six years of experience in developing and customizing financial forecast models, cost of service allocations, rate structure and benchmark analysis, impact fee models, and bond feasibility studies. Through her experience with financial models and data analysis, she has assisted our clients with strong financial solutions based upon sound financial and economic concepts.

Financial Consulting Services | City of Fort Lauderdale | Fort Lauderdale, FL | Lead Financial Analyst
Laura serves as the lead analyst facilitating the integrated financial sustainability analysis including its General Fund and seven separate major funds (Water/Sewer, Regional Wastewater, Stormwater, Sanitation, Airport, Parking, and Building funds). The City utilizes these analyses to be used for real-time evaluation and understanding for its key services decision processes, as well as annual rate adjustments and financial plan analysis for the funds. She customized individual models for each fund and linked each model together to evaluate and understand a variety of decision alternatives and their current and future consequences to each fund. As part of the City's annual budget process, we perform simultaneous updates to all the models.

Comprehensive Financial Consulting Services | City of Palm Bay | Palm Bay, FL | Financial Analyst
Laura serves as the analyst for the City of Palm Bay. In this role she has assisted in developing the City's water and wastewater utility financial sustainability model for five years, performed annual revenue sufficiency analyses, helped develop a 10-year financial management plan for the utility, and identified needed rate adjustments. In 2020 and 2024, Laura worked on a water and wastewater impact fee study, which helped in the evaluation of the Utility's impact fee methodology and application and subsequent impacts to the financial management plan.

Utility Rate Study Public Engagement and Outreach | Stantec | Indian River County Department of Utility Services | Vero Beach, FL | Consultant
Laura serves as the analyst for the Indian River County. In this role she assisted in developing the City's water and wastewater utility financial sustainability model, performed annual revenue sufficiency analyses, helped develop a 10-year financial management plan for the utility, and identified needed rate adjustments. In 2024, Laura worked on a water and wastewater impact fee study, which helped in the evaluation of the Utility's impact fee methodology and application and subsequent impacts to the financial management plan.

Financial Sustainability Models | City of Tamarac | Tamarac, FL | Consultant
Laura developed financial sustainability models to assess both the Water and Wastewater 10-year financial management plan. She also worked on building the cost of service and rate design models to help identify rate structure changes for both Water and Wastewater.

Annual Revenue Sufficiency Analysis | City of Fort Myers | Fort Myers, FL | Financial Analyst
Laura has served as the Financial Analyst for the annual revenue sufficiency analysis for the City's water and sewer utility to develop a multi-year financial plan to sustain operations and fund capital projects. Laura assisted with interactive work sessions with the city staff to review assumptions and inputs, analyzed multiple scenarios, and developed a plan to implement.

Water & Sewer- Financial Modelling & Analysis | City of Clearwater | Clearwater, FL | Financial Analyst
Laura was responsible for modeling and analyzing financial impacts of multiple capital plans and alternative financing scenarios for the City's Water and Sewer system. She assisted with developing and populating our multi-year forecasting model for the City's Water and Sewer Funds. She helped to determine the level of revenues required to satisfy projected annual operating, debt service, and capital cost requirements as well as maintain adequate reserves, while measuring impacts on the utility and affordability of service to rate payers from changes to capital plans and loan terms.

Capacity & Line Extension Fee Study | JEA | Jacksonville, FL | Consultant
Laura served as the analyst during the 2025 capacity and line extension fee study that was done for the Utility. Laura was responsible for modeling and analyzing the Utility's impact fee methodology and application.

Bond Feasibility Study | Orange County Utilities | Orlando, FL | Consultant
Laura served as a consultant to develop a bond feasibility study to support the issuance of a revenue bond for the Utility System. She assisted in updating financial data and drafting the bond feasibility report.

Bond Feasibility Study | Orange Water and Sewer Authority | Carrboro, NC | Financial Analyst
Laura served as a Financial Analyst who helped develop a bond feasibility study to support the issuance of a revenue bond in 2021 for the Authority's Water and Sewer Enterprise Systems. Laura used the financial model to create a multi-year financial forecast for the Authority, in which the analysis provided a detailed look at the impacts of issuing new debt to support large-scale capital projects.

Financial Sustainability Model | City of Aurora | Aurora, OH | Consultant
Laura developed financial sustainability models to assess both the Water and Wastewater 10-year financial management plan. She also worked on building the cost of service and rate design models to help identify rate structure changes for both Water and Wastewater.

Water & Wastewater Financial Sustainability | City of West Melbourne | West Melbourne, FL | Analyst
Laura serves as the analyst for the City of West Melbourne. In this role she has assisted in developing the City's water and wastewater utility financial sustainability model, performed annual revenue sufficiency analyses, helped develop a 10-year financial management plan for the utility, and identified needed rate adjustments. In 2024, Laura worked on a water and wastewater bond feasibility study, which helped in the evaluation of the Utility's ability to issue a bond issuance.

Water Impact Fees Study | Hillsborough County | Tampa, FL | Consultant
Laura served as the consultant for the Hillsborough County Impact fee analysis. In this role she assisted in developing evaluation of the Utility's impact fee methodology and application and subsequent impacts to the financial management plan.

Cost-of-Service Rate Study & Affordability Analysis | Northeast Ohio Regional Sewer District | Cleveland, OH | Financial Analyst
Laura was responsible for developing and updating financial planning models for the District. Specifically, financial planning models were developed to evaluate multiple capital, operating, and financing scenarios within the District to determine the impact on debt financing and necessary rate increases. Laura was also responsible for helping develop a cost-of-service model and rate structures.

Comprehensive Financial Services | Anne Arundel County | Annapolis, MD | Financial Analyst
Laura has served as a financial analyst for multiple financial planning, cost of service and rate studies for the Anne Arundel County Department of Public Works. She has been assisting the County and maintains financial planning models for the County's water and sewer systems. She also developed a 15-year financial model to better evaluate the systems financial health and plan the funding to support large-scale projects.

Availability

Nish Patel

Financial Analyst | Tampa, FL | 4 Years Experience

Project Role: Consultant

Education:

MS, Warrington College of Business, University of Florida, Gainesville, Florida, US, 2021

BS, Warrington College of Business, University of Florida, Gainesville, FL, 2020

Nish is a financial and management analyst and provides strategic and comprehensive financial modeling services tailored to each client. Nish combines his knowledge of industry trends, and financial and accounting acumen to create timely and useful solutions to a variety of operational, capital planning, and revenue sufficiency challenges for water, wastewater, and stormwater utilities. Nish's work experience includes front to end support in revenue sufficiency studies, rate design studies, cost of service analyses, bond feasibility studies and benchmarking analysis.

Utility Rate & General Fund Financial Services | City of Fort Myers | Fort Myers, FL | Rate Consultant
Nish served as the rate consultant for the comprehensive utility rate study for the City. The cost-of-service analysis was used to identify the Utility's cost to provide water, sewer, and reclaimed water service. While the rate design component included an in-depth review of the City's retail rate structure and development of recommendations regarding the structure and level of the Utility's retail water and sewer rates.

Revenue Sufficiency Analysis | City of Fort Myers | Fort Myers, FL | Financial Analyst
Nish has served as the Financial Analyst for the annual revenue sufficiency analysis for the City's water and sewer utility to develop a multi-year financial plan to sustain operations and fund capital projects. Nish assists with interactive work sessions with the city staff to review assumptions and inputs, analyze multiple scenarios, and develop a plan to implement. In addition to the financial analysis, Nish also performed benchmarking analysis to compare rates across similar sized utility systems.

Water, Sewer, & Reclaimed Water Rate Consulting Services | Clearwater, FL | Financial Analyst
Nish served as the financial analyst for a comprehensive water, wastewater, and reclaimed water rate study for the County. This engagement included the development of a 10-year financial management plan, cost of service analysis, and rate design for the County's water and wastewater enterprise fund. The financial management plan considered the County's level of capital spending, operating and capital costs projections, and an evaluation of performance as compared to key performance indicators. The cost of service analysis identified the costs to provide service by system function to guide the recommended rates for retail and wholesale customers. The rate design component included a diagnostic review of current retail rate structure to compare to industry practices, recommendations for improving cost recovery from fixed charges for water and sewer service and simplification of the County's reclaimed water rate structure.

Water & Sewer Rate Study | City of New Port Richey | New Port Richey, FL | Financial Analyst
Nish aided in the conduct of a revenue sufficiency analysis for the City's water and wastewater utility enterprise fund. Specifically, the development of a multi-year projection of utility system costs and revenues to determine the financial sustainability of the utility and identify recommended rate revenue adjustments.

Utility Rate Consulting Services | Pinellas County | Clearwater, FL| Financial Analyst
Nish worked on 4 separate projects within his focus on Utility Rate consulting: the Retail Reclaimed Water Design (finish Dec 2025), the user Fees Study (finish Jun 2025), the New Cost Allocation Study (finish May 2024), and the Water and Sewer Rate Study (finish Jun 2023). Water Rate Design- developed retail reclaimed water rates for the County by compiling and sorting billing history data for retail customers into our rate model and evaluated trends to determine rate structure options. Conducted revenue tests to ensure accuracy of the billing data and evaluated two alternative options to include readiness to serve charges plus a uniform rate and a readiness to serve charge plus two volumetric tiers. User Fees Study- worked with PCU staff to identify 10 agencies for benchmarking of user fees and prepare comparison of the existing user fees. Reviewed activities of operating divisions to which the overhead rate would apply and identified support organizational units and other costs to be included in the overhead rate calculations. Calculated high strength surcharges. New Cost Allocation study- Developed a cost allocation spreadsheet and allocated each of PCU's cost centers between the Water and Sewer Enterprise funds based upon input from County staff and available data, performed QA/QC. Water & Sewer Rate Study- Developed a multi-year financial management plan and evaluated budget versus actual performance (O&M and capital) to determine proper funding levels to include in rate revenue requirements. Reviewed trends in annual expenses to inform future cost escalation.

Bond Feasibility Study | City of Fort Myers | Fort Myers, FL | Financial Analyst
Nish serves as a Financial Analyst who helped develop a bond feasibility study to support the issuance of a revenue bond in 2023 for the Authority's Water and Sewer Enterprise Systems. Nish used the financial model to create a multi-year financial forecast for the Utility, in which the analysis provided a detailed look at the impacts of issuing new debt to support large-scale capital projects.

Water & Sewer Rate Consulting Services | City of Coral Springs | Coral Springs, FL | Financial Analyst
Nish served as the financial analyst for a comprehensive water and sewer rate design study for the City. The rate design component included a diagnostic review of current retail rate structure to compare to industry practices, recommendations for improving cost recovery from fixed charges for water and sewer service. The City approved the recommended rates, rate structure, and corresponding multi-year rate adjustment plan.

Financial Sustainability Analysis & Assessment Role | City of North Port | North Port, FL | Senior Analyst
Nish served as the senior analyst and performed a multi-year revenue sufficiency analysis for the City's Fire Rescue District developing scenarios using the District's existing assessment methodology while incorporating any changes necessary to allocate the appropriate amounts to properties in the District. Phase 2 of the Study involved preparing a detailed assessment roll using the City's official data as provided by the property appraiser.

Financial & Rate Consulting Services | City of Cape Coral | Cape Coral, FL | Financial Analyst
Nish served as the financial analyst for a comprehensive water, wastewater, and irrigation water rate design study for the City. The rate design component included a diagnostic review of current retail rate structure to compare to industry practices, recommendations for improving cost recovery from fixed charges for water and sewer service and simplification of the City's volumetric tier structure. The City unanimously approved the recommended rates, rate structure, and corresponding multi-year rate adjustment plan.

Utility Rate & Financial Consulting Services | City of Cocoa, FL | Cocoa, FL | Financial Analyst
Nish served as an analyst on the Water and Sewer component of the City of Cocoa's integrated financial sustainability analysis. He used financial data provided by the City to model and forecast cash flows for the two utilities. Additionally, he worked on a Stormwater Rate Study for the City of Cocoa including a revenue sufficiency analysis in which he used the financial data provided by the city to create a model to project future financial performance and recommend rate increases.

Availability

Nicholas Juliano

Financial Analyst | Tampa, FL | 6 Years Experience

Project Role: Consultant

Education:
BA Mathematics, Westfield State University, Westfield, MA, 2020
BA, Economics, Westfield State University, Westfield, MA, 2020

Nicholas is a Financial Analyst with the Stantec Financial Services team and has more than a year of municipal financial consulting experience. He has become one of the leaders of our Special Assessment programs with a focus on fire and stormwater analysis modeling, and the development of fair and legally defensible impact fee studies. Nicholas has served as the Financial Analyst in the development of financial forecasts, impact fee programs, and special assessments using our interactive, decision support modeling process for various public agencies.

He has strong, adaptive financial modeling skills and experience interpreting large data for our clients. He's demonstrated the ability to customize financial analyses to meet client needs and leverage our modeling platform as a powerful consulting tool.

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

Utility Rate & Financial Consulting Services | Pasco County | New Port Richey, FL | Financial Analyst
Nicholas serves as the financial analyst for Stantec's financial consulting services for Pasco County. In this role he has assisted developing the County's water, wastewater and reclaimed utility financial sustainability model, performed annual revenue sufficiency analyses, which helped develop a 10-year financial management plans for the utility and identified needed rate adjustments.

Water, Sewer, & Reclaimed Water Rate Consulting Services | Pinellas, County | Clearwater, FL | Financial Analyst
Performed in-depth analysis of water, wastewater, and reclaimed water systems' revenue requirements, including operating, capital, and debt service costs. Allocated costs to wholesale and retail customer classes based on usage characteristics. Proposed rate structure modifications based on fixed cost recovery targets for each system. Developed report with data, analysis, and recommendations, as well as customer impacts.

Sustainable Rate Structure Analysis | New York City DEP | New York, NY | Financial Analyst
Performing comprehensive rate study for the New York City Department of Environmental Protection, including revenue sufficiency, cost allocation, and rate design. Evaluating alternative rate structures to allow the City to meet its objectives of long-term environmental sustainability, equitable rates, and affordability for customers. Evaluating rate structures of comparative utilities and customer assistance programs. Developing stormwater charge based on cost of providing stormwater and resiliency service, as well as green credit program to incentivize green infrastructure.

Integrated Financial Analysis | City of Lake Worth Beach | Lake Worth Beach, FL | Financial Analyst
Nick is currently serving as the Financial Analyst for a comprehensive financial analysis for the City's General Fund and Enterprise Funds. The study includes the development of financial plans for the City's funds as part of the budget process. In addition, he is managing the completion of a financial feasibility study for the City's water, sewer and electric funds in support of a revenue bond issue.

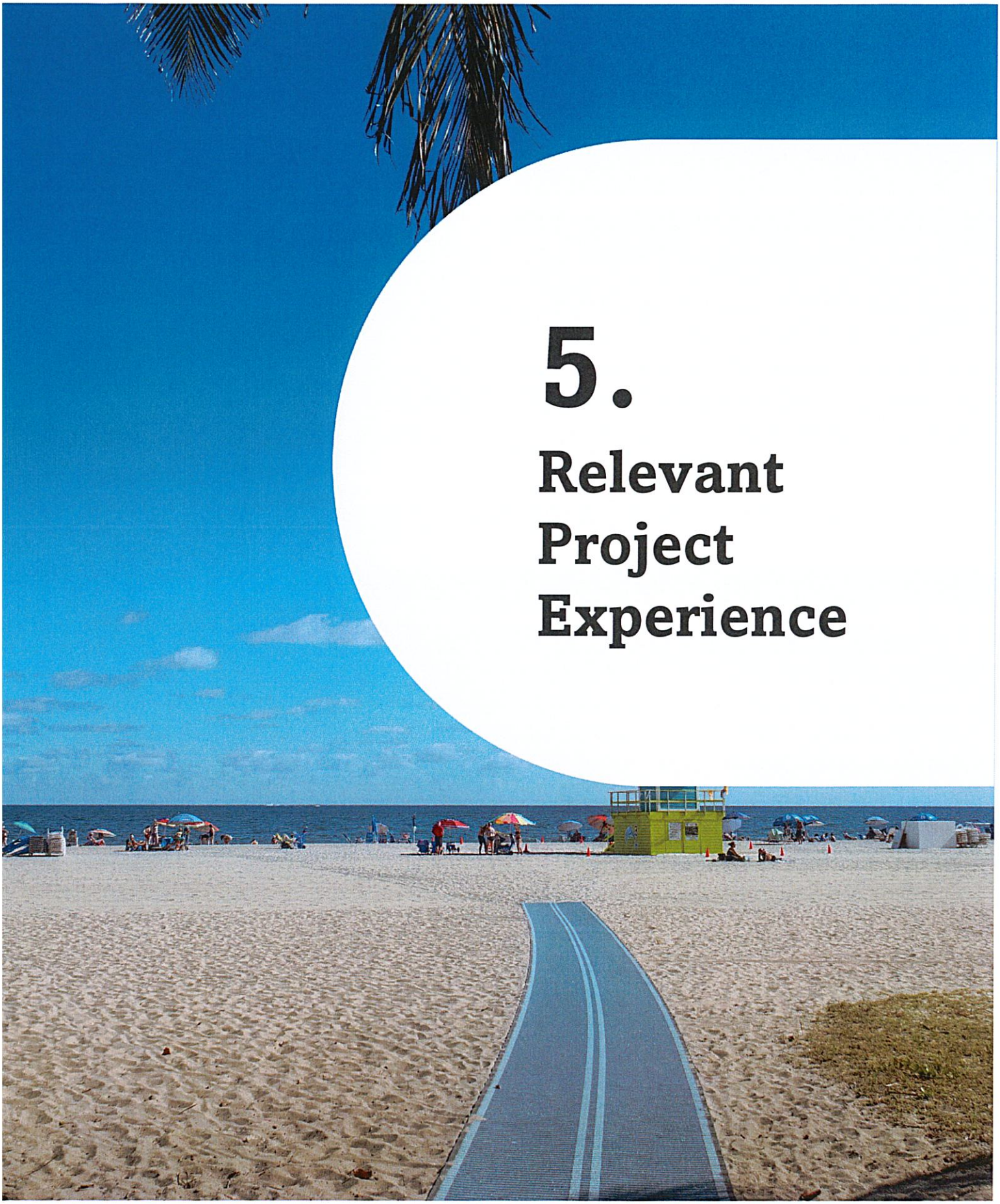
Revenue Sufficiency Analysis | City of Lake Worth Beach | Lake Worth Beach, FL | Lead Consultant
Nicholas oversaw and completed the annual update for eight funds to perform a revenue sufficiency analysis. This included taking annual financial data and forecasting out the health of the fund, and prescribing necessary rate increases to meet financial policies and multi-year rate plans.

Integrated Sustainability Financial Analysis | City of Fort Lauderdale | Fort Lauderdale, FL | Financial Analyst
Nicholas serves as a financial analyst facilitating the integrated financial sustainability analysis including its General Fund and seven separate major funds (Water/Sewer, Regional Wastewater, Stormwater, Sanitation, Airport, Parking, and Building funds). The City utilizes these analyses to be used for real-time evaluation and understanding for its key services decision processes, as well as annual rate adjustments and financial plan analysis for the funds. He customized individual models for each fund and linked each model together to evaluate and understand a variety of decision alternatives and their current and future consequences to each fund. As part of the City's annual budget process, we perform simultaneous updates to all the models.

Surface Water Assessment Governance and Rate Study Update | Pinellas County | Clearwater, FL | Financial Analyst
Nick is assisting in a comprehensive update to the County's 2013 Surface Water Assessment Governance and Rate Study. Analyzing their current and historical data to find rate adjustment plans that support the fund while also being equitable to the resident. The client intends to adopt a multi-year rate plan, thus the analysis and projection is vital. Nick has worked with the client closely to run numerous scenarios to ensure all avenues have been pursued and collaboratively the rate plan is decided upon.

Financial Consulting Services | Hillsborough County | Tampa, FL | Financial Analyst
In his role, Nicholas worked on the County's water and wastewater wholesale agreement analysis with current fiscal year data. He created a new analysis based upon past contract terms and new insight on how customer(s) may be under or over charged and forecasted out fair and equitable increasing charges for the future.

Revenue Sufficiency Analysis | City of Wyoming | Wyoming, MI | Lead Consultant
Nicholas updated both their water and wastewater financial models annually to perform a revenue sufficiency analysis in which we identified, with City staff, increases in revenues, expenses and capital improvement projects that necessitate changes in the rate plan. We recommended multiyear rate plans based upon the updated forecast of the funds as well as identifying certain funding of projects. We do this annually and revisit the assumptions and data going into so it will always reflect the most recent data.



5.

Relevant Project Experience

Project References

We are pleased to present our Florida project experience and relevant references for the County's requested services. The following highlights select work completed within the past five years, and we welcome reference inquiries regarding the quality of our services.

Water, Stormwater, & Sanitation Rate Studies

Client: City of St. Petersburg

Location: St. Petersburg, FL

Duration: 2005 - Present

Client Contact:
Elizabeth Makofske, Budget Director
elizabeth.makofske@stpete.org
(727) 893-7297

175 5th St N, St, 1st Floor
St. Petersburg, FL 33701

Key Project Team Members:
Andrew Burnham
Eric Grau
Kyle Stevens
Emily Snyder
Lance Price

Services Provided:

- Comprehensive annual utility rate studies
- Multi-year financial planning and revenue sufficiency analyses
- Cost of service and rate design analyses
- Development and evaluation miscellaneous charges
- Stakeholder engagement and presentations to City leadership, elected officials, and wholesale customers
- Bond support services, including credit rating agency presentations and grant funding
- Litigation support related to wholesale utility rates

St. Petersburg, a growing city on Florida's west coast, faces challenges related to aging infrastructure and affordability. Since 2005, Stantec has been performing comprehensive annual utility rate studies for the City inclusive of:

- Detailed analysis of historical customer, tonnage, and water demand data, including the development of multi-year projections based upon current economic and environmental conditions
- Development of multi-year financial management plans and rate adjustment plans for solid waste, stormwater, water, sewer, and reclaimed water services
- Cost of service allocations isolating costs between garbage and recycling services, as well as between water, sewer, and reclaimed water services
- Detailed cost allocations between retail and wholesale users to support fair and equitable rates that also conform to industry practices and legal precedent
- Identification of the annual shortfall of reclaimed water revenues as compared to the annual cost of service and the apportionment of that shortfall to the water and sewer systems
- Evaluation of the base and volumetric charges and the subsequent development of modifications to the structure of those charges as appropriate
- Assistance in developing and updating various miscellaneous charges, including sewer capacity fees, fire protection fees, treated water rates, and potable water irrigation rates
- Presentations of the results of each study to City management, elected officials, wholesale users, and other stakeholders, identifying the drivers of any rate adjustments and their impacts to various customer types
- Support in the issuance of bonds, including presentations to the major rating agencies
- Support in the development and administration of the utility's grants program, including compliance
- Assistance with litigation in support of the City's wholesale rates

The recommendations from our annual studies have been routinely implemented and the utility has been able to maintain a very good credit rating with moderate rates and low annual rate adjustments due in large part to the proactive financial management and rate-setting process we facilitate.

Utility Rate & Financial Consulting Services

Client: Tohopekaliga Water Authority

Location: Kissimmee, FL

Duration: 2018 - Present

Client Contact:
Todd Swingle, CEO
tswingle@tohowater.com
(407) 944-5131

951 Martin Luther King Blvd.
Kissimmee, FL 34741

Key Project Team Members:
Andrew Burnham
Eric Grau
Carol Malesky
Hani Alkhouli
Amy Clore

Services Provided:

- Revenue Sufficiency Analysis
- System Development Charge Study
- Operational Benchmarking for Staffing Assessment
- System Development Charge Best Practices Evaluation
- Affordability Program Assessment
- Integration Financial Feasibility Study
- Development Fee Feasibility Study
- Contributions-in-Aid-of-Construction (CIAC) Policy Development

Tohopekaliga Water Authority (Toho) in Central Florida provides water, sewer, and reclaimed water services to more than 100,000 customers and reported approximately $118.5 million in operating revenues in 2018. Like many Florida utilities, Toho faces growing affordability pressures driven by rising housing costs and the need for continued investment in critical infrastructure. These factors can disproportionately affect low-income households and increase the risk of delinquency and revenue volatility—prompting Toho to evaluate customer assistance program (CAP) frameworks and other strategies that improve affordability while maintaining financial sustainability. Since 2018, Stantec has supported Toho through an on-call Rate Consulting Services Agreement, providing financial and management consulting services that help the Authority proactively manage rate adjustments, equitably recover growth-related costs from new development, benchmark operational needs against peers, maintain service levels, measure affordability key performance indicators, and assess CAP options while minimizing adverse revenue impacts and maximizing long-term sustainability.

Revenue Sufficiency Analysis (FAMS): Using Stantec's Financial Analysis and Management System (FAMS) financial forecasting tool, we prepared a revenue sufficiency analysis that enables Toho to evaluate the impacts of changing conditions—such as shifts in demand, economic disruptions (e.g., a pandemic), policy changes (e.g., backflow prevention charges), and utility acquisitions—on revenues, cash flow, and required future rate adjustments. The interactive forecasting model supports long-term budgeting and capital planning, including evaluation of funding strategies and major financing considerations such as WIFIA loan awards. Key performance indicators are tracked to compare actual operating results to targets and rating agency metrics, helping Toho maintain strong financial management and defensible decision-making.

System Development Charge (SDC) Study and Capacity Planning Support: Stantec completed an SDC study that evaluated appropriate level-of-service assumptions for non-residential customers and updated system asset values using fixed asset information and recent master planning capital improvement project costs. The work included evaluation of capacity reservation tracking to support Toho's evolving approach to capacity planning and growth-related cost recovery.

Operational Benchmarking and Staffing Assessment: To assess staffing levels relative to industry standards and comparable utilities, Stantec conducted an operational benchmarking assessment using a broad set of peer metrics. In addition to staffing measures, we evaluated operational indicators such as customer accounts, population served, asset portfolio characteristics, and asset age. We also interviewed peer utilities to strengthen comparisons of practices and performance. The assessment resulted in actionable, high-level recommendations identifying departments, divisions, and process areas where Toho appeared outside peer ranges, supporting data-driven resource planning.

Cost of Service and Rate Structure Development (Reclaimed Water): Stantec performed a budget-based rate study to evaluate cost of service and allocate water demands for Toho's commercial reclaimed customers. We developed an efficient, tiered rate structure intended to encourage responsible water use and supported implementation through development of living databases, testing of billing procedures, stakeholder engagement, and creation of supporting materials for public communication.

Affordability Program Assessment: Building on Toho's affordability goals, Stantec researched potential CAP structures and approaches and evaluated options that balance customer support with revenue protection, sustainability, and administrative feasibility.

Financial & Rate Consulting Services

Client: City of Cape Coral

Location: Cape Coral, FL

Duration: 2001 - Present

Client Contact:
Mark Mason, Assistant City Manager
mmason@capecoral.gov
(239) 574-0491

1015 Cultural Park Boulevard
Cape Coral, FL 33990

Key Project Team Members:
Andrew Burnham
Kyle Stevens
Hani Alkhouli
Eric Grau
Nish Patel

Services Provided:

- Long-term water and wastewater rate consulting services (ongoing for 20+ years)
- Annual updates to 10-year financial management plans and rate adjustments
- Revenue sufficiency analyses for water, wastewater, and reclaimed water systems
- Cost of service and rate structure studies, including customer class allocation
- Rate design and structure modifications to improve equity, affordability, and conservation
- Evaluation and update of miscellaneous utility fees and charges
- Grant funding support
- General Fund and internal cost allocation
- Stormwater rate study supporting operations and maintenance staffing and level-of-service

Cape Coral is a rapidly growing City in Southwest Florida where we have served as the water and wastewater rate consultant for the City for more than 20 years. We perform annual updates of the City's water and wastewater ten-year financial management plan and schedule of annual rate adjustments in conjunction with the City's budget process.

In addition to the annual revenue sufficiency analyses which identify the projected revenue and revenue requirements for the water and wastewater systems for a 10-year period, we performed a cost of service and rate structure analysis for the City's utility system most recently in 2016 and are currently performing an update. This study included the development of potential rate structure modifications that would enhance conformance to industry practices and ensure a fair and equitable distribution of system costs to the City's various customer classes. Revenue requirements were first identified in the revenue sufficiency analysis and then allocated between services (water, wastewater, and reclaimed water) and compared against test year revenues for each system. This established the revenue targets for the rate design element of the study. Ultimately, we developed recommended several rate structure modifications that achieved fair and equitable recovery of the costs from its customer classes, enhance conformance to industry practices and legal requirements, enhance fiscal stability and better recovery of fixed costs, consideration of customer affordability, and promote water conservation.

Recommended modifications included adjusting tier sizing and pricing for water rates, establishment of a separate multi-family customer class with rates based on units rather than meter size, removing the tiered rates for non-residential customers, and implementing a customer charge component to the base facility charges.

In 2019 we evaluated the City's water, wastewater, and irrigation miscellaneous fees using our miscellaneous fees cost template and meeting with City and utility staff to identify the process and associated costs for the utility's various fees and charges.

Our services have also included General Fund analysis, Internal Cost Allocation between Enterprise Funds and the General Fund, and most recently, a Stormwater Rate Study resulting in adjustments to fully fund a 5-year FTE increase plan for operations and maintenance level of service requirements.

Financial Consulting Services

Client: City of Fort Lauderdale

Location: Fort Lauderdale, FL

Duration: 2008 - Present

Client Contact:
Laura Reece, Assistant Budget Manager
lreece@fortlauderdale.gov
(954) 828-5894

101 ND 3rd Avenue
Fort Lauderdale, FL 33301

Key Project Team Members:
Andrew Burnham
Kyle Stevens
Nick Juliano
Eric Grau
Laura Arturo

Services Provided:

- Water and wastewater rate consulting
- Multi-year demand forecasting and customer growth analysis
- Development of multi-year financial management and rate adjustment plans
- Cost of service and rate design analyses for retail and wholesale customers
- Refinement of base, volumetric, and conservation-oriented rate structures
- Development of drought surcharges and affordability enhancements
- Financial feasibility analyses supporting bond issuances and credit ratings
- Updates to water and sewer impact fees and miscellaneous charges
- Financial sustainability planning, scenario analysis, and annual budget support

The City of Fort Lauderdale, Florida is home to approximately 270,000 Floridians and is a well-known tourist destination and center of commerce in the region.

We have served as the water and wastewater rate and financial consultants for the City since 2008, and during that time we have performed a variety of services, including:

- Detailed analysis of historical customer counts and demands as well as the development of multi-year projections of the same.
- Development of multi-year financial management plans and rate adjustment plans.
- Detailed cost of service allocations isolating costs between water and sewer services.
- Detailed cost allocations apportioning the cost of service between retail and wholesale users.
- Evaluation of the base and volumetric charges and the subsequent development of modifications to the structure of those charges as appropriate to conform to accepted industry and local practices.
- Enhanced affordability for low volume users and provide a greater price incentive for conservation to larger volume users with discretionary use.
- Development of water shortage surcharges (drought surcharges).
- Preparation of a financial feasibility report in support of the issuance of bonds, including participation in presentations to the major rating agencies.
- Updates to water and sewer impact/capital cost recovery fees and other miscellaneous charges

In addition to water and wastewater services, we routinely deliver long-term financial modeling and sustainability analysis for the City, including development of a unified forecasting platform for real-time evaluation of key services such as the General Fund and seven enterprise funds (Water/Sewer, Regional Wastewater, Stormwater, Sanitation, Airport, Parking, and Building). We customized and linked individual fund models to evaluate decision alternatives and their near- and long-term impacts. Working closely with City staff, we assessed fund conditions, performed sensitivity analyses, and developed sustainability strategies. As part of the annual budget process, we update all eight models concurrently.

After the financial and housing market collapses in 2008 though, the City struggled to balance their budget each year. Cost cutting measures, cash reserves, and deferral of capital projects were all employed, but the City's financial future was very uncertain. In 2013, the City retained us to develop a ten-year financial sustainability model for the General Fund to help the City Commission understand the depth of the funding challenges and develop a plan that would create a sustainable future based upon current operating and capital spending programs for its desired level of service.

As could be expected, we projected cash flow deficits that would deplete reserves to alarming levels within several years under the status quo. We facilitated several interactive work sessions with key city stakeholders, including the evaluation of alternative strategies during budget hearings before the City Commission. After legal review, local benchmarking, and evaluation of several alternative funding options, we identified a two-part solution reflecting i) operating cost savings from several efficiency initiatives and ii) implementation of a fire services fee revenue enhancement strategy that effectively provided funding for the requirements of all services supported by the General Fund. The City adopted our recommendations, have retained us to update the model each year since, and is now on a positive path to financial sustainability for all of its services.

Utility Rate Consulting Services

Client: Pinellas County Utilities

Location: Clearwater, FL

Duration: 2005 - Present

Client Contact:
Linda Benoit, CPA, Financial Services Division Director
ldbenoit@pinellas.gov
(727) 464-3393

14 South Fort Harrison Ave
Clearwater, FL 33769

Key Project Team Members:
Andrew Burnham
Eric Grau
Jeff Rackley
Nicholas Juliano
Nish Patel

Services Provided:

- Long-term water, sewer, and reclaimed water rate consulting
- Comprehensive utility rate studies conducted under a four-year rate cycle and adoption plan
- Development of long-range financial management and capital plans using FAMS
- Revenue sufficiency, cost of service, and rate structure analyses for retail and wholesale
- Rate design updates and implementation
- Miscellaneous fees, impact fees, and connection charges
- ISO 55000 asset management gap analysis for Stormwater operations

We have provided water, sewer, and reclaimed water financial planning and rate consulting services to Pinellas County since 2005. We have performed their last 5 comprehensive rate studies, largely in conjunction with a 4-year comprehensive rate study cycle and rate adoption plan.

In each rate study, we developed 70-year financial management plans for each enterprise fund using FAMS to review the adequacy of current retail and wholesale rates to recover the cost requirements of each system and to determine the level of any required rate adjustments. This process includes development of a capital financing plan considering various sources of debt vs. cash funding.

The comprehensive rate studies included cost of service analyses to determine the proper allocation of required rate revenue adjustments based upon the allocations of cost of service between retail and wholesale customer classes. Many of these analyses also included a review of the reclaimed water system revenue and cost of service allocation to determine the distribution of any shortfall to the water and sewer rates of the County.

In May of 2023, we completed the latest comprehensive rate study which updated the financial management plan, updated the cost allocation to retail and wholesale customers, and reviewed the rate structure.

As a result, Pinellas County implemented a new four-year rate plan and rate structure modifications including water tiered rates and transition from a flat rate reclaimed water rate structure to one including a volumetric rate component.

In 2022, we performed a comprehensive user fee study considering current costs, processes, and local benchmarking, including updating more than 150 utility miscellaneous fees, water impact and sewer connection fees, fire protection charges, and overhead cost allocation rates.

Additionally, as part of the County's wastewater collection system program, we are sub-contracted and have evaluated the financial and rate impacts of various policies such as private lateral replacements and septic-to-sewer initiatives related repayment options.

Beginning in 2021, Stantec began working with Public Works Stormwater Division to perform a level of service analysis on their operations and maintenance activities. The future costs were used in financial rate forecasting model to develop a 10-year rate plan for the non-ad valorem assessment. An ISO 55000 Gap Analysis was conducted with Stormwater staff to identify areas for improvement in asset management consistent with the recent Stormwater Asset Management Plan.

Utility Rate Consulting Services

Client: City of Hollywood

Location: Hollywood, FL

Duration: 2023 - Present

Client Contact:
Phyllis Shaw, Deputy Director – Finance
Department of Public Utilities
pshaw@hollywoodfl.org
(954) 921-3596

1621 N 14th Ave
Hollywood, FL 33020

Key Project Team Members:
Andrew Burnham
Eric Grau
Hani Alkhouli
Kyle Stevens

Services Provided:

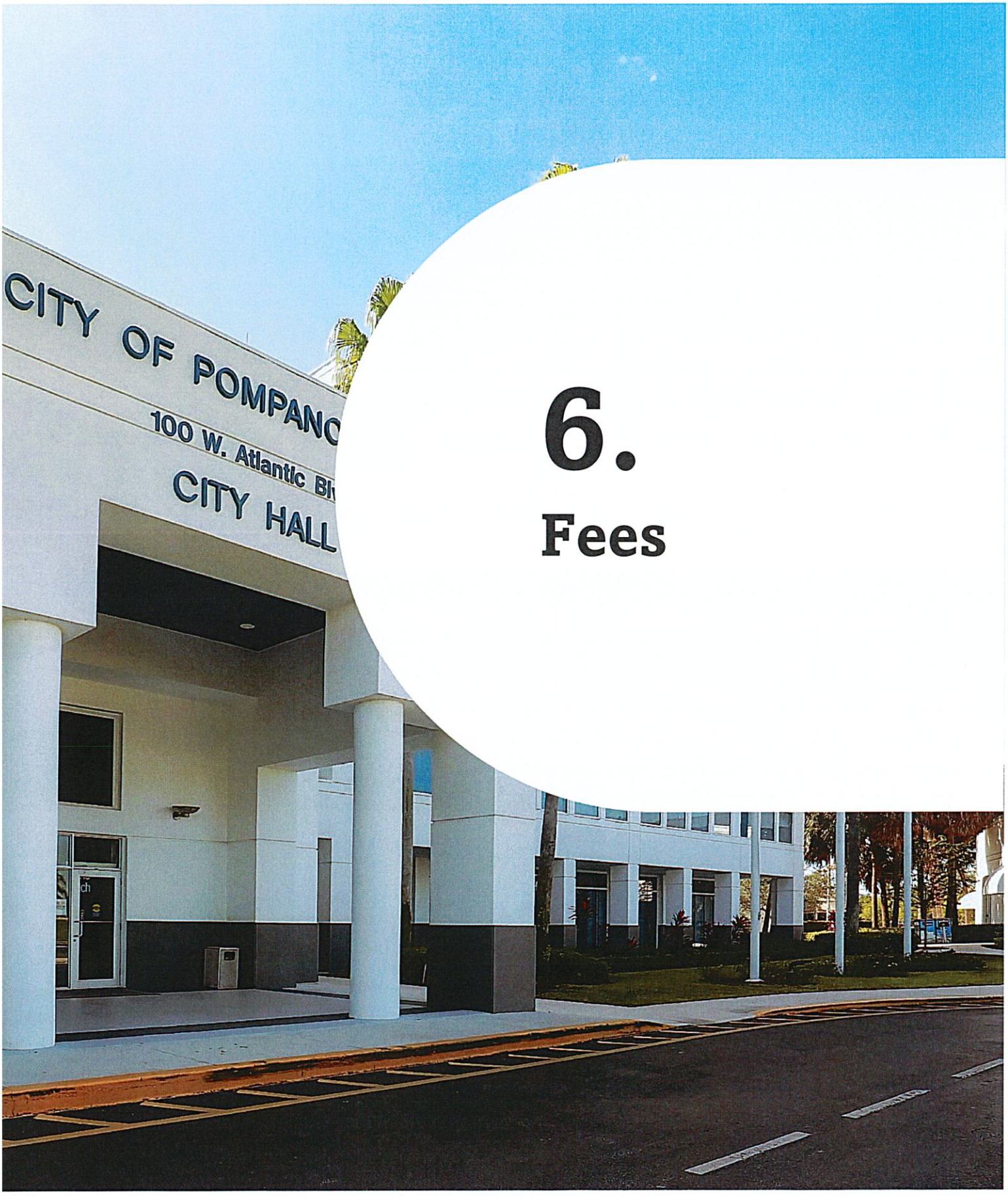
- Utility rate and financial management consulting
- Annual wholesale wastewater rate estimate analyses
- Large User true-up and cost reconciliation analyses
- Cost allocation between City utility operations and Large Users
- Renewal, Replacement, and Improvement (RRI) funding calculations
- Reuse water cost-of-service and full cost recovery evaluations
- Stormwater rate studies and revenue sufficiency analyses
- Development of impervious-area–based data management and public engagement support

We provide professional financial rate and management consulting services related to utility rates and large user agreements for the City of Hollywood. The City provides wholesale wastewater service to several Large Users, including Broward County, the cities of Dania, Hallandale, Miramar, Pembroke Pines, and the Town of Pembroke Park, under treatment agreements dating back to 1990.

On an annual basis, we prepare a rate estimate analysis for the upcoming fiscal year, which serves as the basis for the monthly billings for the Large Users. At the conclusion of each fiscal year, we conduct a Large User True-up analysis to reconcile the actual expenses incurred by the City's sewer system against the actual charges and payments made by each Large User. This comprehensive cost allocation process involves identifying general fund costs associated with the utility, direct water and sewer costs, and properly apportioning these costs between the City of Hollywood and its Large Users. Additionally, we perform the annual Large User Renewal, Replacement, and Improvement (RRI) calculations to reconcile capital project funding and account balances.

Beyond wholesale wastewater cost allocations, our services cover a variety of other enterprise financial evaluations for the City. We recently initiated a detailed review and evaluation of the City's cost to provide reuse water service, aimed at determining full cost recovery rates and evaluating the future capital and operational requirements necessary to reliably provide this alternative water supply.

Furthermore, we provide comprehensive Stormwater Rate Study services to address the significant funding requirements of the City's stormwater utility, including long-term capital needs identified in their recent stormwater master plan. This engagement involves performing a revenue sufficiency analysis, developing up to three stormwater fee alternatives based on measured parcel impervious area, implementing a City-hosted GIS web portal to manage stormwater data, and providing robust support for public engagement meetings and ordinance revisions.



6.
Fees

Fees

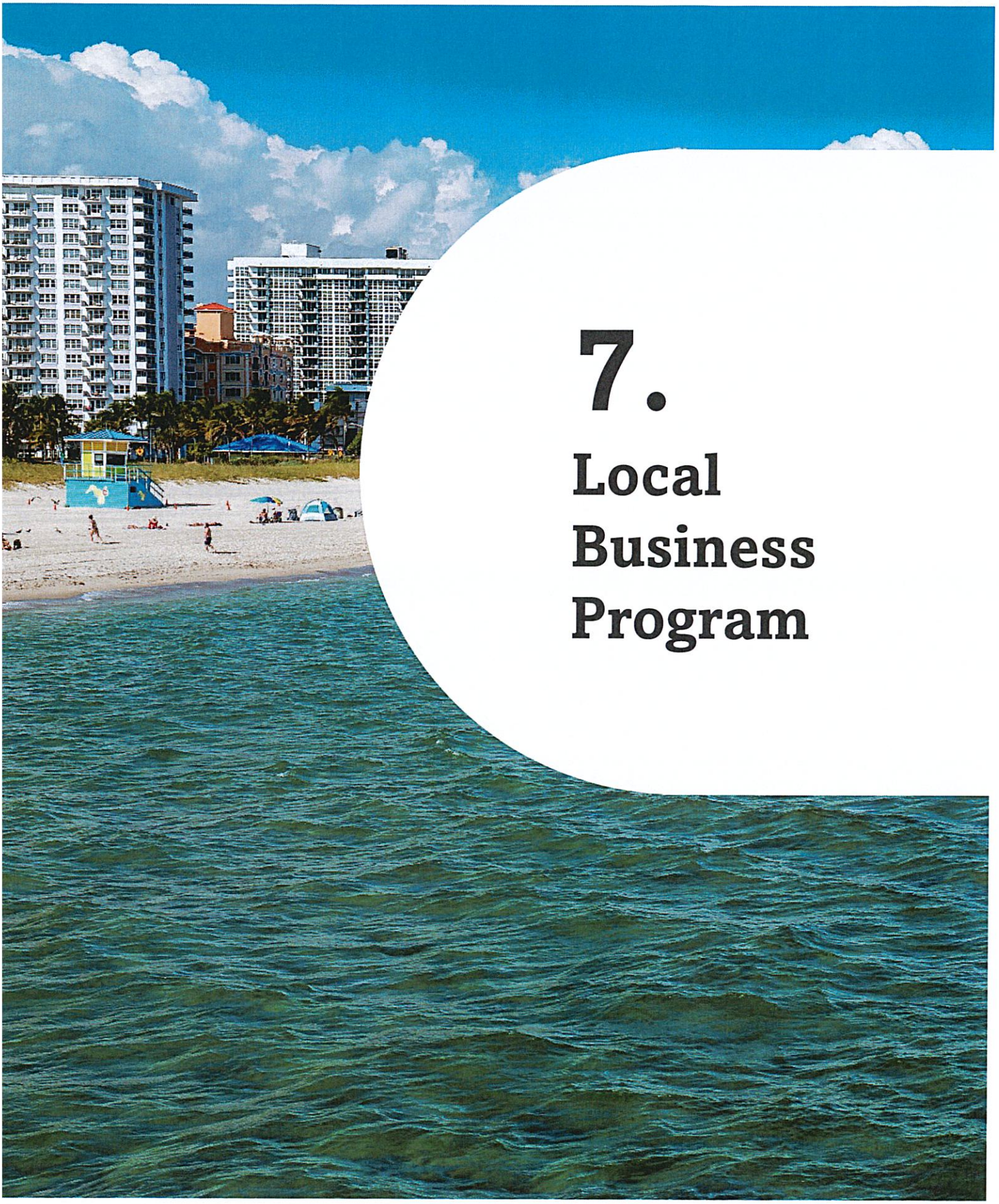
Our fee structure is purposefully designed to deliver maximum value while remaining reasonable, transparent, and highly competitive. We have provided a comprehensive schedule of our hourly rates in Table 3, which clearly outlines the rates for all job titles, alongside any applicable administrative charges. In strict compliance with the City's evaluation criteria, our complete Rate Sheet is also provided in Exhibit B.

We respect the City's budget. Therefore, any authorized estimated expenses, such as necessary travel, are billed strictly at cost with zero markup. We fully support the City's protocol that all reimbursable expenses must be estimated during the negotiation of each individual Work Authorization. To support total accountability and seamless processing, all payment requests will be accompanied by clear copies of paid receipts, invoices, or other documentation acceptable to the City.

We understand and agree that our proposed rates will remain firm for the duration of the initial five-year contract term, unless modified by mutual written agreement. To maintain our high standard of service and account for standard market inflation, we anticipate requesting a modest annual adjustment to our hourly rates in alignment with the City's price adjustment procedures to account for future inflation.

Table 3. Hourly rates.

Hourly Rates	
Job Title	**Hourly Rate**
Project Manager	$450
Deputy Project Manager	$300
Quality Control	$350
Consultant	$200
Financial Analyst	$175
Data Analyst	$150
Admin	$100
Subject Matter Expert Level 1	$375
Subject Matter Expert Level 2	$325
Subject Matter Expert Level 3	$275
Subject Matter Expert Level 4	$225



7.

Local Business Program

Local Business

Stantec respects and supports the City of Pompano Beach's vision for local economic empowerment as established by Ordinance 2018-46. Reinvesting in the communities where we live and work is a core pillar of our corporate philosophy. As a dedicated regional partner, we actively sought to maximize our participation in the City's Local Business Program for this Utilities Rate, Financial Planning and Organizational Services contract.

Our Local Footprint

We are proud to serve the region from our permanent office located right here in Broward County (Deerfield Beach). While this robust local presence provides the City with highly responsive, localized expertise, our current internal staffing levels at this specific office do not presently meet the 15% Pompano Beach resident threshold required to independently claim Tier 2 Local Vendor status.

Demonstrated Good Faith Efforts and Proactive Outreach

Recognizing the importance of local economic inclusion, our team proactively pursued partnerships with local Pompano Beach subconsultants to meet the subcontracting criteria for the Local Business Program. We contacted via email and phone a highly regarded local subconsultant operating within the City limits to invite their participation on our team. Unfortunately, despite our earnest and documented outreach efforts, we did not receive a response to partner on this specific pursuit.

Because we hold ourselves to the highest standards of transparency and partnership, we are bringing this to the City's attention through the formal Good Faith Efforts process outlined in the RFP. We view this not as a setback, but as a demonstration of our genuine diligence and proactive approach to community inclusion.

Strict Compliance and Required Documentation

In strict adherence to the City's procurement instructions for firms not claiming tier participation due to unavailability, we have provided all mandatory documentation to provide a fully responsive proposal. Included in our submittal, you will find:

- **Exhibit A (Local Business Participation Form) & Exhibit B (Letter of Intent):** Included and clearly marked **"NOT APPLICABLE"** throughout, strictly satisfying the RFP's responsiveness requirements for proposers not actively claiming Tier 1 or Tier 2 points.
- **Exhibit C (Local Business Unavailability Form):** Detailing our outreach to the local Pompano Beach subconsultant who was unavailable/unresponsive.
- **Exhibit D (Good Faith Effort Report):** Thoroughly describing the proactive efforts Stantec made to include local business participation in this contract.

Stantec remains fully committed to maximizing economic value for the City of Pompano Beach. Should future work authorizations or subcontracting opportunities arise during the lifecycle of this up to five-year agreement, we are dedicated to continuously revisiting the local Pompano Beach market to integrate City businesses into our project delivery.

Business Certifications

Stantec Consulting Services Inc. certifies that it meets the definition of a "professional qualified independent consultant" as described in Florida Statutes Chapter 175.071(6)(b) entitled "General powers and duties of board and trustees" and Chapter 185-05(5)(b) entitled "General powers and duties of board of trustees. Additionally, Stantec is not a certified minority business enterprise.

TIER 1/TIER 2 COMPLIANCE FORM

IN ORDER FOR YOUR FIRM TO COMPLY WITH THE CITY'S LOCAL BUSINESS PROGRAM AS A TIER 1 OR TIER 2 VENDOR, BIDDERS MUST COMPLETE THE INFORMATION BELOW AND UPLOAD THE FORM TO THE RESPONSE ATTACHMENTS TAB IN THE EBID SYSTEM.

TIER 1 LOCAL VENDOR

_____ My firm has maintained a permanent place of business within the city limits and maintains a staffing level, within this local office, of at least 10 % who are residents of the City of Pompano Beach.

And/Or

_____ My firm has maintained a permanent place of business within the city limits and my submittal includes subcontracting commitments to Local Vendors Subcontractors for at least 10 % of the contract value.

Or

X My firm does not qualify as a Tier 1 Vendor.

TIER 2 LOCAL VENDOR

_____ My firm has maintained a permanent place of business within Broward County and maintains a staffing level, within this local office, of at least 15% who are residents of the City of Pompano Beach

And/Or

_____ My firm has maintained a permanent place of business within Broward County and my submittal includes subcontracting commitments to Local Vendors Subcontractors for at least 20% of the contract value.

Or

X My firm does not qualify as a Tier 2 Vendor.

I certify that the above information is true to the best of my knowledge.

May 13, 2026
(Date)

Stantec Consulting Services Inc.
(Name of Firm)

BY: Andrew Burnham
(Name)

LOCAL BUSINESS EXHIBIT "A"
CITY OF POMPANO BEACH, FLORIDA
LOCAL BUSINESS PARTICIPATION FORM

Solicitation Number & Title: RFP 26-040 Utilities Rate, Financial Planning, & Organizational Services Prime Contractor's Name: Stantec Consulting Services Inc.

Name of Firm, Address	Contact Person, Telephone Number	Type of Work to be Performed/Material to be Purchased	Contract Amount or %
N/A			

LOCAL BUSINESS EXHIBIT "A"

LOCAL BUSINESS EXHIBIT "B"
LOCAL BUSINESS
LETTER OF INTENT TO PERFORM AS A LOCAL SUBCONTRACTOR

Solicitation Number RFP 26-040

TO: Stantec Consulting Services Inc.
(Name of Prime or General Bidder)

The undersigned City of Pompano Beach business intends to perform subcontracting work in connection with the above contract as (check below)

_____ an individual

_X_ a corporation

_____ a partnership

_____ a joint venture

The undersigned is prepared to perform the following work in connection with the above Contract, as hereafter described in detail:

N/A

at the following price: _____

_____
(Date)

N/A
(Print Name of Local Business Contractor)

_____
(Street Address)

_____
(City, State Zip Code)

BY: N/A
(Signature)

IMPORTANT NOTE: Signatures on this form MUST be by an authorized employee of Subcontractor and must be uploaded to the Response Attachment Tab

LOCAL BUSINESS EXHIBIT "B"

LOCAL BUSINESS EXHIBIT "C

LOCAL BUSINESS
UNAVAILABILITY FORM

BID # RFP 26-040

I, Kelly Westover, Senior Principal
(Name and Title)

of Stantec Consulting Services Inc., certify that on the 5th day of May, 2026, I invited the following LOCAL BUSINESSES to bid work items to be performed in the City of Pompano Beach:

Business Name, Address	Work Items Sought	Form of Bid Sought (i.e., Unit Price, Materials/Labor, Labor Only, etc.)
Projetare, 510 NE 28th Ct, Pompano Beach, FL - Public Outreach - Teaming Partner Request		

Said Local Businesses:

X Did not bid in response to the invitation

___ Submitted a bid which was not the low responsible bid

___ Other:_____

Name and Title: Kelly Westover, Senior Principal

Date: May 13, 2026

Note: Attach additional documents as available.

LOCAL BUSINESS EXHIBIT "D"
GOOD FAITH EFFORT REPORT
LOCAL BUSINESS PARTICIPATION

BID # RFP 26-040

1. What portions of the contract have you identified as Local Business opportunities?

Public Outreach

2. Did you provide adequate information to identified Local Businesses? Please comment on how you provided this information.

Initial email contact included pertinent RFP information, PDF of solicitation for reference, and request for assistance with public outreach services.

3. Did you send written notices to Local Businesses?

____ Yes X No

If yes, please include copy of the notice and the list of individuals who were forwarded copies of the notices.

4. Did you advertise in local publications?

____ Yes X No

If yes, please attach copies of the ads, including name and dates of publication.

5. What type of efforts did you make to assist Local Businesses in contracting with you ?

Contacted Projetare via email and phone

7. List the Local Businesses you will utilize and subcontract amount.

N/A $_____

_____ $_____

_____ $_____

8. Other comments: _____

Contacted Projetare via email and phone, recieved no response.

_____

_____

_____

From: Westover, Kelly
To: info@projetare.us
Cc: Coto, Chelsea
Subject: RE: Teaming Partner for City of Pompano
Date: Thursday, May 7, 2026 10:12:52 AM
Attachments: image001.png
image002.png
image003.png
image004.png

Good morning,
I was hoping to talk to someone today about potentially teaming for this proposal. I called the main number and left a message as well.
Best,
Kelly

Kelly Westover, MBA, PMP, CFM
Senior Principal, Management & Technology

Mobile: (941) 504-7239
kelly.westover@stantec.com

Stantec

From: Westover, Kelly
Sent: Tuesday, May 5, 2026 3:07 PM
To: 'info@projetare.us' <info@projetare.us>
Cc: Coto, Chelsea <Chelsea.Coto@stantec.com>
Subject: Teaming Partner for City of Pompano

Hi Mr. Gontijo,

Stantec is submitting a proposal to the City of Pompano to provide Utility Rate, Financial Planning and Organizational Services. We are looking for a local teaming partner to assist with public outreach that may be required as part of the services. As such, we came across your firm located within the City and wanted to initiate a conversation to see if you are interested in teaming with us on this proposal.

If so, Chelsea, copied on this email can provide a list of the information we would need to include in the proposal. Please let me now if you are available and interested to join us.

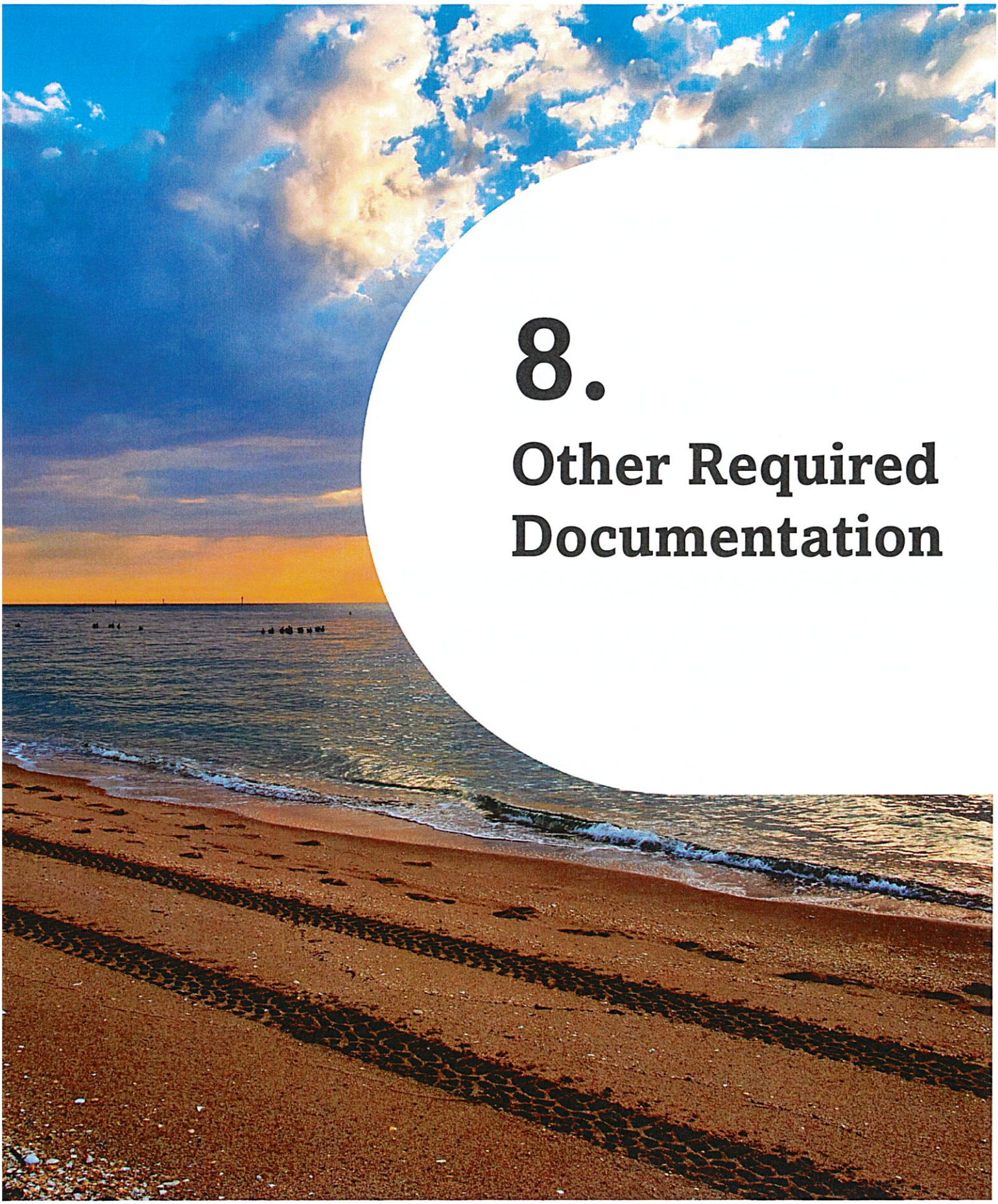
Best,
Kelly

Kelly Westover, MBA, PMP, CFM
Senior Principal, Management & Technology

Mobile: (941) 504-7239
kelly.westover@stantec.com

Stantec
6920 Professional Parkway, Sarasota FL 34240-8414, United States

Stantec



8.

Other Required Documentation

BROWARD COUNTY LOCAL BUSINESS TAX RECEIPT

115 S. Andrews Ave., Rm. A-100, Ft. Lauderdale, FL 33301-1895 – 954-357-4829

VALID OCTOBER 1, 2025 THROUGH SEPTEMBER 30, 2026

Receipt #: 315-274235

Business Name: STANTEC CONSULTING SERVICES INC **Business Type:** ENGINEER (CERTIFICATE OF AUTHORIZATION)

Owner Name: STANTEC CONSULTING SERVICES INC **Business Opened:** 01/06/2016

Business Location: 800 FAIRWAY DR STE 195 DEERFIELD BEACH **State/County/Cert/Reg:**

Exemption Code:

Business Phone:

Rooms	Seats	Employees	Machines	Professionals
		4		

For Vending Business Only

Number of Machines: Vending Type:

Tax Amount	Transfer Fee	NSF Fee	Penalty	Prior Years	Collection Cost	Total Paid
30.00	0.00	0.00	0.00	0.00	0.00	30.00

Receipt Fee 30.00

Packing/Processing/Canning Employees 0.00

THIS RECEIPT MUST BE POSTED CONSPICUOUSLY IN YOUR PLACE OF BUSINESS

THIS BECOMES A TAX RECEIPT

WHEN VALIDATED

This tax is levied for the privilege of doing business within Broward County and is non-regulatory in nature. You must meet all County and/or Municipality planning and zoning requirements. This Business Tax Receipt must be transferred when the business is sold, business name has changed or you have moved the business location. This receipt does not indicate that the business is legal or that it is in compliance with State or local laws and regulations.

Mailing Address:

STANTEC CONSULTING SERVICES INC
1687 114TH AVE SE STE 100
BELLEVUE, WA 98004

Receipt #WWW-24-00275773
Paid 07/03/2025 30.00

2025 - 2026

BROWARD COUNTY LOCAL BUSINESS TAX RECEIPT

115 S. Andrews Ave., Rm. A-100, Ft. Lauderdale, FL 33301-1895 – 954-357-4829

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Exemption Code:

Business Phone:

Rooms	Seats	Employees	Machines	Professionals
		4		

Signature

For Vending Business Only

Number of Machines: Vending Type:

Tax Amount	Transfer Fee	NSF Fee	Penalty	Prior Years	Collection Cost	Total Paid
30.00	0.00	0.00	0.00	0.00	0.00	30.00

Receipt #WWW-24-00275773
Paid 07/03/2025 30.00

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 10/1/2026 5/12/2026

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

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

PRODUCER Lockton Companies, LLC DBA Lockton Insurance Brokers, LLC in CA CA license #0F15767 444 W. 47th St., Ste. 900 Kansas City MO 64112-1906 (816) 960-9000 kcasu@lockton.com	CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A : Berkshire Hathaway Specialty Insurance Company	22276
INSURED 1414100 STANTEC CONSULTING SERVICES INC. 410 17TH STREET SUITE 1400 DENVER CO 80202-4427	INSURER B : AIG Specialty Insurance Company	26883
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** 23506467 **REVISION NUMBER:** XXXXXXX

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY			NOT APPLICABLE			EACH OCCURRENCE	$ XXXXXXX
	CLAIMS-MADE OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ XXXXXXX
							MED EXP (Any one person)	$ XXXXXXX
							PERSONAL & ADV INJURY	$ XXXXXXX
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ XXXXXXX
	POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$ XXXXXXX
	OTHER:							$
	AUTOMOBILE LIABILITY			NOT APPLICABLE			COMBINED SINGLE LIMIT (Ea accident)	$ XXXXXXX
	ANY AUTO						BODILY INJURY (Per person)	$ XXXXXXX
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$ XXXXXXX
	HIRED AUTOS ONLY / NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$ XXXXXXX
								$ XXXXXXX
	UMBRELLA LIAB OCCUR			NOT APPLICABLE			EACH OCCURRENCE	$ XXXXXXX
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	$ XXXXXXX
	DED RETENTION $							$ XXXXXXX
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N			NOT APPLICABLE			PER STATUTE OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? N/A						E.L. EACH ACCIDENT	$ XXXXXXX
	(Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$ XXXXXXX
							E.L. DISEASE - POLICY LIMIT	$ XXXXXXX
A	Professional Liab	N	N	47-EPP-308810-07	10/1/2025	10/1/2026	$3,000,000 PER CLAIM/AGG	
A				NO RETROACTIVE DATE			INCLUSIVE OF COSTS	
B	Contractors Pollution Liab			CPO 8085428	10/1/2025	10/1/2027	$3,000,000 PER LOSS/AGG	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
RE: RFP26-040, UTILITIES RATE, FINANCIAL PLANNING, AND ORGANIZATIONAL SERVICES.

CERTIFICATE HOLDER

23506467
CITY OF POMPANO BEACH
100 W. ATLANTIC BLVD., SUITE 253,
POMPANO BEACH, FL 33060

CANCELLATION

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

AUTHORIZED REPRESENTATIVE

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CERTIFICATE OF LIABILITY INSURANCE

5/1/2027

DATE (MM/DD/YYYY) 5/12/2026

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

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

PRODUCER Lockton Companies, LLC DBA Lockton Insurance Brokers, LLC in CA CA license #0F15767 444 W. 47th St., Ste. 900 Kansas City MO 64112-1906 (816) 960-9000 kcasu@lockton.com	CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A : Berkshire Hathaway Specialty Insurance Company	22276
INSURED 1415077 STANTEC CONSULTING SERVICES INC. 410 17TH STREET SUITE 1400 DENVER CO 80202-4427	INSURER B : Travelers Property Casualty Company of America	25674
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** 23506470 **REVISION NUMBER:** XXXXXXX

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY [ ] CLAIMS-MADE [X] OCCUR X CONTRACTUAL/CROSS X XCU COVERED GEN'L AGGREGATE LIMIT APPLIES PER: [ ] POLICY [X] PRO-JECT [X] LOC [ ] OTHER:	Y	Y	47- GLO-307584 -08	5/1/2026	5/1/2027	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG $	$ 2,000,000 $ 1,000,000 $ 25,000 $ 2,000,000 $ 4,000,000 $ 2,000,000 $
B	AUTOMOBILE LIABILITY X ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS [ ] HIRED AUTOS ONLY [ ] NON-OWNED AUTOS ONLY	N	Y	TC2JCAP- 8E086819-TIL-26	5/1/2026	5/1/2027	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident) $	$ 1,000,000 $ XXXXXXX $ XXXXXXX $ XXXXXXX $ XXXXXXX
A	X UMBRELLA LIAB [X] OCCUR EXCESS LIAB [ ] CLAIMS-MADE [ ] DED [ ] RETENTION $	N	N	47- UMO-307585-08	5/1/2026	5/1/2027	EACH OCCURRENCE AGGREGATE $	$ 5,000,000 $ 5,000,000 $ XXXXXXX
B B B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? [N] (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A	Y	UB- 3P635310- 26-51-K (AOS) UB-3P533004- 26-51-R(MA,WI) EXCEPT FOR OH ND WA WY	5/1/2026 5/1/2026	5/1/2027 5/1/2027	X PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ 1,000,000 $ 1,000,000 $ 1,000,000

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

RE: RFP26-040, UTILITIES RATE, FINANCIAL PLANNING, AND ORGANIZATIONAL SERVICES. CITY OF POMPANO BEACH IS AN ADDITIONAL INSURED AS RESPECTS GENERAL LIABILITY AND THIS COVERAGE IS PRIMARY AND NON-CONTRIBUTORY, IF REQUIRED BY WRITTEN CONTRACT. WAIVER OF SUBROGATION IN FAVOR OF CITY, ITS OFFICERS, EMPLOYEES AND AGENTS APPLIES TO GENERAL LIABILITY, AUTO LIABILITY AND WORKERS COMPENSATION/EMPLOYER'S LIABILITY WHERE ALLOWED BY STATE LAW AND IF REQUIRED BY WRITTEN CONTRACT.

CERTIFICATE HOLDER

23506470
CITY OF POMPANO BEACH
100 W. ATLANTIC BLVD., SUITE 253,
POMPANO BEACH, FL 33060

CANCELLATION

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

AUTHORIZED REPRESENTATIVE

Joseph M Agnello

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With every community, we redefine what's possible.

Stantec is a global leader in sustainable engineering, architecture, and environmental consulting. The diverse perspectives of our partners and interested parties drive us to think beyond what's previously been done on critical issues like climate change, digital transformation, and future-proofing our cities and infrastructure. We innovate at the intersection of community, creativity, and client relationships to advance communities everywhere, so that together we can redefine what's possible.

Stantec Consulting Services Inc.
800 Fairway Drive, Suite 195
Deerfield Beach, FL 33441
stantec.com

Detail by Entity Name

Foreign Profit Corporation
STANTEC CONSULTING SERVICES INC.

Filing Information

Document Number	F01000005948
FEI/EIN Number	11-2167170
Date Filed	11/14/2001
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Status	ACTIVE
Last Event	CORPORATE MERGER
Event Date Filed	12/27/2007
Event Effective Date	12/31/2007

Principal Address

410 17TH STREET
SUITE 1400
DENVER, CO 80202

Changed: 04/16/2023

Mailing Address

10220 - 103 AVENUE NW
SUITE 300
EDMONTON T5J 0K4 CA

Changed: 07/24/2023

Registered Agent Name & Address

CORPORATION SERVICE COMPANY
1201 HAYS STREET
TALLAHASSEE, FL 32301

Name Changed: 02/14/2013

Address Changed: 02/14/2013

Officer/Director Detail

Name & Address

Title Director, VP, Asst. Secretary

STONE, JEFFREY P
61 COMMERCIAL STREET
SUITE 100
ROCHESTER, NY 14614

Title President

JOHNSTON, GORDON A
10220 - 103 AVENUE NW
SUITE 300
EDMONTON T5J 0K4 CA

Title Secretary

HEISLER, CHRISTOPHER O
10220 - 103 AVENUE NW
SUITE 300
EDMONTON T5J 0K4 CA

Title VP

CASTELLA, RAMON
901 PONCE DE LEON BLVD
SUITE 900
CORAL GABLES, FL 33134

Title VP

WILHOIT, KRISTOPHER
6920 PROFESSIONAL PARKWAY EAST
SARASOTA, FL 34240

Title Senior Principal

STOKER, DOUGLAS E
380 PARK PLACE BOULEVARD
SUITE 300
CLEARWATER, FL 33759

Title VP

HOLMES, MEGAN
1500 SPRING GARDEN STREET
SUITE 1100
PHILADELPHIA, PA 19130

Title Senior Principal

BUTTARI, SCOTT
6920 PROFESSIONAL PARKWAY EAST
SARASOTA, FL 34240

Title VP

BURNHAM, ANDREW
777 S HARBOUR ISLAND BLVD
STE 600
TAMPA, FL 33602

Title VP

CLORE, AMY
777 S HARBOUR ISLAND BLVD
STE 600
TAMPA, FL 33602

Title Director, COO, EVP

Reisbord, Susan
1060 Andrew Drive
Suite 140
West Chester, PA 19308-5602

Title Treasurer

Culmone, Vito
200-325 35 Street SE
Calgary, Alberta T2A 7H8 CA

Title SVP

Jaegerman, Adriana
One Biscayne Tower
2 South Biscayne Boulevard
Suite 1670
Miami, FL 33131-2709

Title Principal

Cunningham, Robert R.
6920 Professional Parkway East
Sarasota, FL 34240-8414

Title VP

Aceto, Frank
1060 Andrew Drive
Suite 140
West Chester, PA 19308-5602

Annual Reports

Report Year	Filed Date
2025	01/02/2025

2025	01/06/2025
2026	01/07/2026

Document Images

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04/16/2021 -- ANNUAL REPORT	View image in PDF format
01/16/2020 -- ANNUAL REPORT	View image in PDF format
05/03/2019 -- AMENDED ANNUAL REPORT	View image in PDF format
04/06/2019 -- ANNUAL REPORT	View image in PDF format
03/15/2018 -- ANNUAL REPORT	View image in PDF format
02/16/2017 -- ANNUAL REPORT	View image in PDF format
08/26/2016 -- AMENDED ANNUAL REPORT	View image in PDF format
04/21/2016 -- ANNUAL REPORT	View image in PDF format
02/05/2015 -- ANNUAL REPORT	View image in PDF format
04/17/2014 -- ANNUAL REPORT	View image in PDF format
04/03/2013 -- AMENDED ANNUAL REPORT	View image in PDF format
02/14/2013 -- ANNUAL REPORT	View image in PDF format
02/29/2012 -- ANNUAL REPORT	View image in PDF format
02/01/2011 -- ANNUAL REPORT	View image in PDF format
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01/31/2005 -- Name Change	View image in PDF format
09/13/2004 -- ANNUAL REPORT	View image in PDF format
08/04/2003 -- ANNUAL REPORT	View image in PDF format
11/06/2002 -- ANNUAL REPORT	View image in PDF format

11/14/2001 -- Foreign Profit

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Florida Department of State, Division of Corporations

Detail by Entity Name

Foreign Profit Corporation
WILLDAN FINANCIAL SERVICES, INC.

Cross Reference Name

MUNIFINANCIAL, INC.

Filing Information

Document Number	F03000006225
FEI/EIN Number	33-0302345
Date Filed	12/15/2003
State	CA
Status	ACTIVE
Last Event	NAME CHANGE AMENDMENT
Event Date Filed	06/13/2008
Event Effective Date	NONE

Principal Address

27368 Via Industria
Suite 200
Temecula, CA 92590-4856

Changed: 02/26/2026

Mailing Address

2401 E. Katella Avenue
Suite 300
Anaheim, CA 92806

Changed: 02/26/2026

Registered Agent Name & Address

CT CORPORATION SYSTEM
1200 S. PINE ISLAND ROAD
FORT LAUDERDALE, FL 33324

Name Changed: 06/07/2004

Address Changed: 06/07/2004

Officer/Director Detail

Name & Address

Title Assistant Secretary

Smith, Rebekah
27368 Via Industria
Suite 200
Temecula, CA 92590-4856

Title President / CEO

Risco, Mark J.
27368 Via Industria
Suite 200
Temecula, CA 92590-4856

Title Secretary

Nguyen, Kate
27368 Via Industria
Suite 200
Temecula, CA 92590-4856

Title Treasurer / CFO

Early, Creighton K.
27368 Via Industria
Suite 200
Temecula, CA 92590-4856

Title Director

Bieber, Michael A.
27368 Via Industria
Suite 200
Temecula, CA 92590-4856

Annual Reports

Report Year	Filed Date
2024	04/05/2024
2025	03/24/2025
2026	02/26/2026

Document Images

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10/18/2006 -- REINSTATEMENT	View image in PDF format
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12/15/2003 -- Foreign Profit	View image in PDF format

Florida Department of State, Division of Corporations

Exhibit C – Cover Page

Insurance Requirements

Insurance

EXHIBIT C - INSURANCE REQUIREMENTS :

CONTRACTOR shall not commence services under the terms of this Agreement until certification or proof of insurance detailing terms and provisions has been received and approved in writing by the CITY's Risk Manager. If you are responding to a bid and have questions regarding the insurance requirements hereunder, please contact the City's Purchasing Department at (954) 786-4098. If the contract has already been awarded, please direct any queries and proof of the requisite insurance coverage to City staff responsible for oversight of the subject project/contract.

CONTRACTOR is responsible to deliver to the CITY for timely review and written approval/disapproval Certificates of Insurance which evidence that all insurance required hereunder is in full force and effect and which name on a primary basis, the CITY as an additional insured on all such coverage. **Such policy or policies shall be issued by United States Treasury approved companies authorized to do business in the State of Florida. The policies shall be written on forms acceptable to the City's Risk Manager, meet a minimum financial A.M. Best and Company rating of no less than Excellent, and be part of the Florida Insurance Guarantee Association Act. No changes are to be made to these specifications without prior written approval of the City's Risk Manager.**

Throughout the term of this Agreement, CITY, by and through its Risk Manager, reserve the right to review, modify, reject or accept any insurance policies required by this Agreement, including limits, coverages or endorsements. CITY reserves the right, but not the obligation, to review and reject any insurer providing coverage because of poor financial condition or failure to operate legally.

Failure to maintain the required insurance shall be considered an event of default. The requirements herein, as well as CITY's review or acceptance of insurance maintained by CONTRACTOR, are not intended to and shall not in any way limit or qualify the liabilities and obligations assumed by CONTRACTOR under this Agreement.

Throughout the term of this Agreement, CONTRACTOR and all subcontractors or other agents hereunder, shall, at their sole expense, maintain in full force and effect, the following insurance coverages and limits described herein, including endorsements.

A. Worker's Compensation Insurance covering all employees and providing benefits as required by Florida Statute, Chapter 440, regardless of the size of the company (number of employees) or the state in which the work is to be performed or of the state in which Contractor is obligated to pay compensation to employees engaged in the performance of the work. Contractor further agrees to be responsible for employment, control and conduct of its employees and for any injury sustained by such employees in the course of their employment.

B. Liability Insurance.

(1) Naming the City of Pompano Beach as an additional insured as City's interests may appear, on General Liability Insurance only, relative to claims which arise from Contractor's negligent acts or omissions in connection with Contractor's performance under this Agreement.

(2) Such Liability insurance shall include the following checked types of insurance and indicated minimum policy limits.

Type of Insurance	**Limits of Liability**
GENERAL LIABILITY:	Minimum $1,000,000 Per Occurrence and $2,000,000 Per Aggregate
* Policy to be written on a claims incurred basis	
XX_ comprehensive form	bodily injury and property damage
XX_ premises - operations	bodily injury and property damage
_ explosion & collapse hazard	
__ underground hazard	
XX_ products/completed operations hazard	bodily injury and property damage combined
XX_ contractual insurance	bodily injury and property damage combined
XX_ broad form property damage	bodily injury and property damage combined
XX_ independent contractors	personal injury
XX_ personal injury	
XX_ CG2010	ongoing operations (or its' equivalent)
XX_ CG 2037	completed operations (or its' equivalent)
__ sexual abuse/molestation	Minimum $1,000,000 Per Occurrence and Aggregate

---

AUTOMOBILE LIABILITY:	[X]	Minimum $1,000,000 Per Occurrence and $2,000,000 Per Aggregate. Bodily injury (each person) bodily injury (each accident), property damage, bodily injury and property damage combined.
XX comprehensive form	[ ]	Minimum $10,000/$20,000/$10,000 (Florida's Minimum Coverage)
XX owned		
XX hired		
XX non-owned		

Please note that Florida Statue Section 255.05 requires contractors who enter into a contract with the City to purchase a payment and performance bond when the contract is in excess of $200,000.

REAL & PERSONAL PROPERTY

__ comprehensive form Agent must show proof they have this coverage.

EXCESS LIABILITY		Per Occurrence	Aggregate
XX_ umbrella (Drop Down).	bodily injury and property damage combined	$1,000,000	$1,000,000

ENVIRONMENTAL/POLLUTION LIABILITY	Per Occurrence	Aggregate
* Policy to be written on a claims made basis	$1,000,000	$1,000,000

CONTRACTOR is required to provide Environmental/Pollution Liability for damage(s) caused by hazardous waste material.

PROFESSIONAL LIABILITY	Per Occurrence	Aggregate
XX_ Policy to be written on a claims made basis	$2,000,000	$2,000,000

CONTRACTOR is required to provide Professional Liability if engineering and design is used.

CYBER LIABILITY	Per Occurrence	Aggregate
__ * Policy to be written on a claims made basis	$3,000,000	$3,000,000

__ Network Security / Privacy Liability
__ Breach Response / Notification Sublimit (minimum limit of 50% of policy aggregate)
__ Technology Products E&O - $3,000,000 (only applicable for vendors supplying technology related services and or products)
__ Coverage shall be maintained in effect during the period of the Agreement and for not less than four (4) years after termination/ completion of the Agreement.

CRIME LIABILITY	Per Occurrence	Aggregate
__ * Policy to be written on a claims made basis	$1,000,000	$1,000,000

---

(3) If Professional Liability insurance is required, Contractor agrees the indemnification and hold harmless provisions of Section 12 of the Agreement shall survive the termination or expiration of the Agreement for a period of three (3) years unless terminated sooner by the applicable statute of limitations.

C. Employer's Liability. CONTRACTOR and all subcontractors shall, for the benefit of their employees, provide, carry, maintain and pay for Employer's Liability Insurance in the minimum amount of One Hundred Thousand Dollars ($100,000.00) per employee, Five Hundred Thousand Dollars ($500,000) per aggregate.

D. Policies: Whenever, under the provisions of this Agreement, insurance is required of the CONTRACTOR, the CONTRACTOR shall promptly provide the following:

(1) Certificates of Insurance evidencing the required coverage;

(2) Names and addresses of companies providing coverage;

(3) Effective and expiration dates of policies; and

(4) A provision in all policies affording CITY thirty (30) days written notice by a carrier of any cancellation or material change in any policy.

E. Insurance Cancellation or Modification. Should any of the required insurance policies be canceled before the expiration date, or modified or substantially modified, the issuing company shall provide thirty (30) days written notice to the CITY.

F. Waiver of Subrogation. CONTRACTOR hereby waives any and all right of subrogation against the CITY, its officers, employees and agents for each required policy. When required by the insurer, or should a policy condition not permit an insured to enter into a pre-loss agreement to waive subrogation without an endorsement, then CONTRACTOR shall notify the insurer and request the policy be endorsed with a Waiver of Transfer of Rights of Recovery Against Others, or its equivalent. This Waiver of Subrogation requirement shall not apply to any policy which includes a condition to the policy not specifically prohibiting such an endorsement, or voids coverage should CONTRACTOR enter into such an agreement on a pre-loss basis.

Please note that Florida Statue Section 255.05 requires contractors who enter into a contract with the City to purchase a payment and performance bond when the contract is in excess of $200,000.

CERTIFICATE OF LIABILITY INSURANCE

5/1/2027

DATE (MM/DD/YYYY)
5/12/2026

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

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

PRODUCER Lockton Companies, LLC DBA Lockton Insurance Brokers, LLC in CA CA license #0F15767 444 W. 47th St., Ste. 900 Kansas City MO 64112-1906 (816) 960-9000 kcasu@lockton.com	CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:
INSURED 1415077 STANTEC CONSULTING SERVICES INC. 410 17TH STREET SUITE 1400 DENVER CO 80202-4427	INSURER(S) AFFORDING COVERAGE — NAIC # INSURER A : Berkshire Hathaway Specialty Insurance Company — 22276 INSURER B : Travelers Property Casualty Company of America — 25674 INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** 23506470 **REVISION NUMBER:** XXXXXXX

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR X CONTRACTUAL/CROSS X XCU COVERED GEN'L AGGREGATE LIMIT APPLIES PER: POLICY X PRO-JECT X LOC OTHER:	Y	Y	47- GLO-307584 -08	5/1/2026	5/1/2027	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG 	$ 2,000,000 $ 1,000,000 $ 25,000 $ 2,000,000 $ 4,000,000 $ 2,000,000 $
B	AUTOMOBILE LIABILITY X ANY AUTO OWNED AUTOS ONLY HIRED AUTOS ONLY SCHEDULED AUTOS NON-OWNED AUTOS ONLY	N	Y	TC2JCAP- 8E086819-TIL-26	5/1/2026	5/1/2027	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident) 	$ 1,000,000 $ XXXXXXX $ XXXXXXX $ XXXXXXX $ XXXXXXX
A	X UMBRELLA LIAB X OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $	N	N	47- UMO-307585-08	5/1/2026	5/1/2027	EACH OCCURRENCE AGGREGATE 	$ 5,000,000 $ 5,000,000 $ XXXXXXX
B B B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N: N If yes, describe under DESCRIPTION OF OPERATIONS below	N / A	Y	UB- 3P635310- 26-51-K (AOS) UB-3P533004- 26-51-R(MA,WI) EXCEPT FOR OH ND WA WY	5/1/2026 5/1/2026	5/1/2027 5/1/2027	X PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 1,000,000 $ 1,000,000 $ 1,000,000

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

RE: RFP26-040, UTILITIES RATE, FINANCIAL PLANNING, AND ORGANIZATIONAL SERVICES. CITY OF POMPANO BEACH IS AN ADDITIONAL INSURED AS RESPECTS GENERAL LIABILITY AND THIS COVERAGE IS PRIMARY AND NON-CONTRIBUTORY, IF REQUIRED BY WRITTEN CONTRACT. WAIVER OF SUBROGATION IN FAVOR OF CITY, ITS OFFICERS, EMPLOYEES AND AGENTS APPLIES TO GENERAL LIABILITY, AUTO LIABILITY AND WORKERS COMPENSATION/EMPLOYER'S LIABILITY WHERE ALLOWED BY STATE LAW AND IF REQUIRED BY WRITTEN CONTRACT.

CERTIFICATE HOLDER

23506470
CITY OF POMPANO BEACH
100 W. ATLANTIC BLVD., SUITE 253,
POMPANO BEACH, FL 33060

CANCELLATION

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

AUTHORIZED REPRESENTATIVE

Joseph M Agnello

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CERTIFICATE OF LIABILITY INSURANCE

10/1/2026

DATE (MM/DD/YYYY) 5/12/2026

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

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

PRODUCER Lockton Companies, LLC DBA Lockton Insurance Brokers, LLC in CA CA license #0F15767 444 W. 47th St., Ste. 900 Kansas City MO 64112-1906 (816) 960-9000 kcasu@lockton.com	CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:
INSURED 1414100 STANTEC CONSULTING SERVICES INC. 410 17TH STREET SUITE 1400 DENVER CO 80202-4427	INSURER(S) AFFORDING COVERAGE — NAIC # INSURER A : Berkshire Hathaway Specialty Insurance Company — 22276 INSURER B : AIG Specialty Insurance Company — 26883 INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** 23506467 **REVISION NUMBER:** XXXXXXX

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INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY			NOT APPLICABLE			EACH OCCURRENCE	$ XXXXXXX
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ XXXXXXX
							MED EXP (Any one person)	$ XXXXXXX
							PERSONAL & ADV INJURY	$ XXXXXXX
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ XXXXXXX
	☐ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG	$ XXXXXXX
	OTHER:							$
	AUTOMOBILE LIABILITY			NOT APPLICABLE			COMBINED SINGLE LIMIT (Ea accident)	$ XXXXXXX
	☐ ANY AUTO						BODILY INJURY (Per person)	$ XXXXXXX
	☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS						BODILY INJURY (Per accident)	$ XXXXXXX
	☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$ XXXXXXX
								$ XXXXXXX
	UMBRELLA LIAB ☐ OCCUR			NOT APPLICABLE			EACH OCCURRENCE	$ XXXXXXX
	EXCESS LIAB ☐ CLAIMS-MADE						AGGREGATE	$ XXXXXXX
	☐ DED ☐ RETENTION $							$ XXXXXXX
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N			NOT APPLICABLE			☐ PER STATUTE ☐ OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? ☐ N / A (Mandatory in NH)						E.L. EACH ACCIDENT	$ XXXXXXX
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$ XXXXXXX
							E.L. DISEASE - POLICY LIMIT	$ XXXXXXX
A	Professional Liab	N	N	47-EPP-308810-07	10/1/2025	10/1/2026	$3,000,000 PER CLAIM/AGG	
A				NO RETROACTIVE DATE			INCLUSIVE OF COSTS	
B	Contractors Pollution Liab			CPO 8085428	10/1/2025	10/1/2027	$3,000,000 PER LOSS/AGG	

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

RE: RFP26-040, UTILITIES RATE, FINANCIAL PLANNING, AND ORGANIZATIONAL SERVICES.

CERTIFICATE HOLDER

23506467
CITY OF POMPANO BEACH
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POMPANO BEACH, FL 33060

CANCELLATION

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