



THE TOWN OF KENNETH CITY, FLORIDA
Council Meeting
PUBLIC NOTICE

The Council of the Town of Kenneth City will meet at Community Hall, located at 4600 58th Street North, Kenneth City, Florida to discuss the agenda items of Town business listed at the time indicated below.

6:30pm

June 8, 2022

Community Hall

- A. Call to Order
- B. Invocation and Pledge of Allegiance
- C. Roll Call
- D. Consent Agenda
 1. May Meeting Minutes
 - a. 05/04/2022 Special Workshop Meeting
 - b. 05/04/2022 Special Council Meeting
 - c. 05/11/2022 Council Meeting
- E. Public Comment (limited to 3 minutes)

Please state your name and address for the record. Public participation is encouraged. If you are addressing the Council, step to the podium and state your name and address for the record. Public comments can also be submitted by email to the Town Clerk at Town57@kennethcityfl.org, written comments must be received by 4pm on the day of the meeting and will be read aloud during the meeting. Please limit your comments to 400 words as the comments are limited to three minutes.
- F. Action Agenda
 1. Interim Town Manager Candidate
 - Exhibit 1: Bob Daniels Resume
 2. Procurement Ordinance No. 2022-657 SECOND READING
 - Exhibit 2: ORDINANCE NO. 2022-657
 3. Management Consulting Firms (1. MCF followed by 2.)
 - a. Department of Management Services Packet
 - Exhibit 3 (attachment 1-5)
 - b. Administrative Assistant Resumes
 - Exhibit 4: 10 Applicants
 - c. Accounting and Finance Specialist
 - Exhibit 5: 14 Applicants
 - d. Imagine That Performance
 - Exhibit 6: ITP *Presentation*
 - Exhibit 7: Imagine That Performance Agreement
 4. Legal Services Request for Proposal
 - Exhibit 8: Email from Attorney Mora
 - Exhibit 9: KC Retainer Agreement
 - Exhibit 10: KC Town Attorney RFP

G. Department Reports

1. Public Safety

- a. KCPD stats
- b. Fire Department Report and statistics

2. Public Works Report

3. Building, Planning and Zoning

- a. KC Building Stats

H. Officer Reports (Manager, Clerk, Attorney)

I. Mayor/Council Comment

J. Adjournment

Any person who decides to appeal any decision of the Town Council with respect to any matter considered at this meeting will need a record of the proceedings and for such purposes may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. The law does not require the Town Clerk to transcribe verbatim minutes; therefore, the applicant must make the necessary arrangements with a private reporting firm and bear the resulting expense. In accordance with the Americans with Disability Act and F.S. 286.26; any person with a disability requiring reasonable accommodation in order to participate in this meeting should call 727-498-8948 or fax a written request to 727-498-8841. www.kennethcityfl.org



THE TOWN OF KENNETH CITY, FLORIDA

Special Workshop Meeting Minutes
May 4, 2022

A. Call to Order

B. Invocation and Pledge of Allegiance

C. Roll Call

Present were, Councilmember Roberts, Councilmember Zemaitis, Councilmember Noble, Vice Mayor Cummings, Mayor Howell, Town Manager Cavalli, Attorney Mora and Town Clerk Ana Cabezas.

D. Public Comment

Teresa Zemaitis, 5201 57th Street N
Commented on the workshop's agenda, *Imagine That* and the Town's policies concerning Requests for Proposals.

E. Workshop Discussion

Town Manager Transition, special presentation by Rob Duncan

Rob Duncan from *Imagine That Performance* facilitated a presentation. Themes covered were the manager's resignation, factors that impact recruitment of a new manager, budget and revenue assessment, recommended path, next actions and near to mid- and long-term needs.

There was a discussion.

The mayor opened the floor to public comment.

Tim Shoby, Lake Charles Drive

Mr. Shoby commented on procurement processes and recommendations.

Jeff Pfannes, 4494 61st LN N

Thanked Rob Duncan for his presentation and recommended that the Town work to retain Manager Cavalli.

Teresa Zemaitis, 5201 57th Street N

Commented on *Imagine That Performance* and the next steps the Town can take.

Ellen Dalvo, 4726 58th Street N

Asked the Town to work to retain Manager Cavalli, or ask Manager Cavalli to procure his successor.

Sue Wilson, 46th Ave.

Commented on succession and the budget.

Vice Mayor Cummings commented on the things that were said during the meeting and stated that he does not know why the Town Manager resigned.

H. Adjournment

Motion to adjourn the meeting was made by Vice Mayor Cummings

Second was made by Councilmember Noble

All in favor

Special Workshop was adjourned 8:22pm

Respectfully submitted by
Ana Cabezas
Town Clerk

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THE TOWN OF KENNETH CITY, FLORIDA

Special Council Meeting Minutes
May 4, 2022

A. Call to Order

B. Public Comment

There was no public comment

C. Action Agenda

1. Town Manager

There was a brief exchange between Attorney Mora and Mayor Howell in which Attorney Mora asked the Council Body for direction, following the discussion of the workshop.

Council Member Zemaitis stated that she would like to move forward with engaging a company to assist the Town with an executive search for a new Town Manager. She asked that Manager Cavalli initiate the steps towards procuring said company. The attorney stated that consensus direction would be sufficient to move forward with this request.

Councilmember Roberts asked Manager Cavalli if he would consider staying, to avoid the Town from having to recruit a new Town Manager. Manager Cavalli responded that several factors would have to be in place in order for him to consider remaining with the Town.

Public Comment

Teresa Zemaitis, 5201 57th Street N

Ms. Zemaitis commented on steps the Town could take to start recruitment efforts.

Jeffrey Pfannes, 4494 61st Lane N

Mr. Pfannes asked the Town to work to retain the employ of Manager Cavalli.

Paul Ashe, 6412 44th Ave N

Mr. Ashe advised the Town Council to reflect on why the Town Manager wishes to leave, rectify those situations and do what it takes to have him stay. Mr. Ashe went on to commend the job Manager Cavalli has done during his time in this role.

Council Member Zemaitis spoke in agreement with the recommendations and suggested another meeting or workshop to have those conversations would be beneficial.

Council Member Cummings stated that he believes better communication would be beneficial to all.

Attorney Mora stated, “just to confirm there is a consensus direction from the body for staff to investigate the procurement efforts for a firm to conduct management recruitment.” The response from the Council body was, yes.

2. Town Accountant

There was a brief discussion regarding recruiting an accountant. Council Member Zemaitis stated that the Town needed to recruit an accountant alongside with their manager recruitment efforts. Council Member Noble stated that she believed these efforts should wait until the scope of services was better defined. There was a discussion between Manager Cavalli and Council regarding accounting software, hiring consultants and resources.

The Attorney Mora stated to the Council that while they are the policy making body, they are not in a position to be making policy “right now.” He asked that the Council let the Officers of the Town know “what personnel you are authorizing to exist to move forward.” In addition to recruiting a manager, he asked if they want to recruit an accountant. “We want to know from you, what seats do you want us to fill?” He asked Council to provide direction regarding the pressing personnel needs of the Town. The attorney confirmed that the current, singular directive of the Council body has been to find a management recruitment firm.

There was some discussion among the Council.

The mayor opened the floor to public comment.

Ellen Dalvo, 4726 58th St N

Commented that Manager Cavalli is the best person to know what kind of help he would need in the upcoming weeks leading to his exit date.

Cindi Hite, 6514 43rd Ave N

Commented on the lag between the Manager’s resignation and the council’s efforts to respond to the Town’s pressing needs. She encouraged the Council to work more collaboratively with Manager Cavalli.

Councilmember Noble requested clarification from Attorney Mora that Manager Cavalli has the consensus he needs to initiate the search for executive level assistance. Attorney Mora confirmed that there is consensus direction to proceed with action items 1 and 2.

3. Code Enforcement

Councilmember Roberts asked if “two items” was not sufficient for Manager Cavalli to have to manage between today and his departure from the Town. There was some discussion. The Manager advised the Council to “table” Code Enforcement recruitment for now. He stated that pressing code issues will be handled by the Town Administration and the Police Department “for now.”

H. Adjournment

Motion to adjourn the meeting was made by Vice Mayor Cummings.

Councilmember Zemaitis said she would second the motion and also stated that she would like a meeting or the ability to sit down with Manager Cavalli to discuss his needs, and to learn what “we can do better” as a Council. Attorney Mora stated, “there is nothing in the law that prevents each of you individually from speaking with Pete, at any time, one on one.” Attorney Mora stated these conversations could happen publicly as well.

Councilmember Zemaitis seconded the motion to adjourn the meeting

All in favor

Meeting was adjourned at 9:32pm

Respectfully submitted by
Ana Cabezas
Town Clerk

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A video recording of this meeting can be accessed at: https://youtu.be/_c0_R7l64AA



THE TOWN OF KENNETH CITY, FLORIDA

Council Meeting Minutes
May 11, 2022

A. Call to Order

B. Invocation and Pledge of Allegiance

C. Roll Call

Present were Councilmember Roberts, Councilmember Zemaitis, Councilmember Noble, Vice Mayor Cummings, Mayor Howell, Town Manager Cavalli, Attorney Mora and Town Clerk Ana Cabezas.

D. Consent Agenda

April 13, 2022 Council Meeting Minutes

April 27, 2022 Council Meeting Minutes

Motion to approve consent agenda made by Councilmember Noble.

Second was offered by Vice Mayor Cummings.

All in favor

Motion to approve consent agenda passed

E. Public Comment

Make Warner, 6088 44th Ave N

Commented on garbage collection change and code enforcement issue.

F. Action Agenda

1. Procurement Rules: Ordinance 2022-657

Attorney Mora read proposed Ordinance 2022-657 by title only. This was a first reading. There was a brief discussion.

The public was invited to comment. There was no public comment.

A motion to approve Ordinance No 2022-657 was made by Councilmember Noble. A second was offered by Vice Mayor Cummings.

The motion passed by a roll call vote:

Councilmember Roberts	No
Councilmember Zemaitis	Yes
Councilmember Noble	Yes
Vice Mayor Cummings	Yes
Mayor Howell	Yes

2. Executive Search for a Town Manager

Attorney Mora provided a summary to the Town Council on the specifics of the Invitation to Bid. There was a discussion.

The public was invited to comment.

Teresa Zemaitis, 5201 57th Street N

Commented that the Council should not wait to publish the invitation to bid, and that she is disappointed in the council for not making the effort to retain Manager Cavalli.

Councilmember Noble said she does not want to move forward on the Invitation to Bid. She said she has not had an opportunity to read it and that it is important not to rush into hiring a full-time employee. She asked that the council “table the topic.” She stated that the Town could hire a consultant to complete the budget.

There was further discussion. Attorney Mora further explained the purpose of the invitation to bid, stating that this specific full-time employee is “integral to your form of government.” He provided context for the timeline of this invitation to bid given the current climate of the Town staffing and directives that were recently given. Attorney Mora advised the council body that the invitation to bid contract presented to them is not a contract or an invitation to hire a full-time employee, it is an invitation to hire an agency that will identify candidates for the Town Manager position.

There was a discussion about critical next steps, the importance of initiating the ITB, the possibility of hiring an interim Town Manager and the need for “professional help.”

A motion to approve the Invitation to Bid was made by Councilmember Zemaitis. A second was offered by Councilmember Roberts.

There was a roll call vote:

Councilmember Roberts	Yes
Councilmember Zemaitis	Yes
Councilmember Noble	No
Vice Mayor Cummings	No
Mayor Howell	No

The motion failed.

G. Department Reports

Public Safety

Chief Vieno announced to the council and residents that the PD is going to be engaged in a critical reaccreditation process in the upcoming year and that he is not interested in serving as an interim Town Manager.

Chief Vieno shared April traffic statistics (education, citations and warnings). He reported on past and future events. He shared information about hurricane and emergency management as well as emergency shelters.

Fire Department

Pinellas Park Fire Department, Chief, Brett Schlatterer and Suzanne Boisvert presented. Ms. Boisvert shared a presentation on the 2022 Hurricane Season Forecast. Chief Schlatterer provided the April Fire Department statistics and general department updates.

Public Works

DPW supervisor Ken Moore, provided updates on the projects they are currently working on such as patching roads, responding to resident complaints and concerns. His department has been working on repairing and preparing equipment prior to the start of hurricane season.

H. Officer Reports

Manager Cavalli provided updates on the Town's finances, the Community Rating System (CRS) and recruiting assistance with that project, Pinellas Park's Building Department concluding their partnership with the Town at the end of this calendar year, and some infrastructure concerns about unit 12. The Town Clerk and Town Attorney had no report.

I. Mayor/Council Comments

Councilmember Roberts thanked Attorney Mora and Manager Cavalli for the work that they put into their reports and the ITB. Councilmember Noble asked Attorney Mora to follow up on his offer for an interim Manager. Mayor Howell commented on next steps for recruiting a Town Manager, minimizing animosity and working together. A brief discussion ensued.

J. Adjournment

Motion to adjourn the meeting was made by Councilmember Roberts

Second was made by Councilmember Zemaitis

All in favor

Meeting was adjourned at 8:40pm

Respectfully submitted by
Ana Cabezas
Town Clerk

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ROBERT DANIELS, CM, MPA

456 Oriole Circle, Jupiter, FL 33458

Phone: (561) 339 - 4026 | Email: rjdan14@aol.com

Results oriented City Manager with over thirty years progressively responsible experience in public administration managing operations in municipal government. Demonstrated proficiency in coordinating programs and interfacing with professionals of all levels; coupled with strong ability to assess services and support with stakeholders and elected officials. Profound knowledge of the government policies and regulations pertaining to budgeting and accounting, coupled with an outstanding knowledge of municipal ordinances, Florida laws, and federal legislation necessary for the management of a municipal government. Highly skilled in city planning, economic development, and personnel management as well as effective communication skills.

SKILLS SUMMARY

- Demonstrated working knowledge in the interpretation of the codes, city policies and procedures, and the state and federal laws applicable to Florida local government, including but not limited to the Public Records Act, Sunshine Law, Code of Ethics and the statutes governing the budgeting and financial operations.
- Demonstrated ability to delegate responsibilities to the proper department director and provide mentoring opportunities.
- Demonstrated ability to make effectively communicate and make recommendations to the Commission and provide feedback on all operations.
- Deals with residents, businesses, officials and contractors, and employees in a professional, tactful, diplomatic, transparent, and honest manner.
- Oversee the administration of all vendor contracts, interlocal agreements, grant opportunities, and development agreements.
- Oversee the supervision of, and implementation of Emergency Disaster and Hurricane Response Plans.
- Oversight of budget development, appropriations, and budget administration along with monitoring the effectiveness of all fiscal operations to ensure expenditures and revenue are within projections.
- Use of cutting-edge technology, internet, cloud-based applications, and software tools.
- **Software:** Microsoft Office, Paycom, HRIM, GIS, and Munis.
- Extensive experience in law enforcement management.

EXPERIENCE

City Manager — City of Madeira Beach, Florida (2019 – 2022)

- Oversaw all operations of a barrier island community and increased community involvement.
- Ensured that all laws, provisions of the charter, and directives of the Board of Commissioners were enforced.
- Offer recommendations to the Board of Commissioners to facilitate a shared vision and assist in the decision-making of the Commission.

- Developed new avenues of communicating with the residents and other stakeholders seeking transparency of all operations.
- Submit regular communications to the Board of Commissioners concerning the operations of the City Departments, personnel, and on-going projects.
- Kept open door communications with Commissioners, residents, employees, and other stakeholders.
- Worked with lobbyists to secure Florida legislative allocations for major projects and local community partners to improve operations for the beach communities.
- Developed transparent code enforcement investigations and utilized a smart phone application to improve communications with residents.

Key Achievements:

All stakeholders reaped the benefits of a strong economic development program. Just recently, we were successful in obtaining legislative allocations of \$1.75 million for renovation of our fifty-year-old beach groins and \$500,000 towards a local roadway project. Successfully completed a \$12 Million residential roadway rebuild with new storm water systems and water and sewer lines on time and within budget. I also successfully negotiated a three-year labor agreement with our firefighters. Our beach was chosen by Trip Advisor as the #9 beach in the country thanks to our cleanliness campaign and our pro-tourism strategies. We also developed a non-profit organization to seek funding for beautification of our parks, beaches, and the city.

Town Manager— Town of Melbourne Beach, FL (2017 – 2019)

- Direct administration of all departments of the Town except the Town Attorney.
- Developed community outreach programs to increase citizen involvement in town operations.
- Worked with a long-standing Sustainability Committee to develop environmental programs and recycling kitchen waste into compost.
- Developing and overseeing the town budget and financial operations, planning and code management, personnel administration, facility management, procurement, public works, community development, grant administration, building department and public relations. Oversight of the volunteer fire department.
- Developed fund raising programs for park and playground improvements.
- Worked with local leaders to combat water pollution affecting local canals and waterways.

Key Achievements:

- Experience rehabilitating a crumbling stormwater utility system and securing FEMA grant funding to assist with the financial commitment.
- Revamped the code enforcement function creating a better quality of life for the residents.
- Transformed the police department with the hire of a new police chief, the addition of a school resource officer function, and revamping the security functions.
- Completed a pier restoration project, beach renourishment, and pavilion renovations.

Interim Town Manager — North Bay Village, FL (2010-2015)

Worked as the Interim City Manager for one year and additionally served as the police chief and acting City manager as needed.

- Managed all city operations to include planning, economic development, building, finance, personnel, IT, public works, water and sewer operations, and the police department.

Key Achievements:

- Calmed labor unrest by successfully negotiating a new labor agreement and instituting a labor-management committee.
- Improved internal and external communications with the City Commission and staff.
- Initiated a park development project with grant and bond funding.
- Successfully brought to closure a major main line sewer and beautification project.
- Developed the City's Code Enforcement functions with the latest technology.
- Initiated an Emergency Management Response Plan and responsible for all emergency operations.
- Implementation of security protocols to provide a safer working environment for employees and citizens.

Position Held in Law Enforcement

Chief of Police — North Bay Village, Florida (4 years)

Chief of Police -- Buckeye Police Department, Buckeye, Arizona (1 years)

Assistant Chief of Police -- Juno Beach Police Department, Juno Beach, Florida (3 years)

Interim Chief of Police -- Florida Atlantic University Police Services, Boca Raton, Florida (1 year)

Boca Raton Police Services Department, Boca Raton, Florida (26 years) retiring as Assist. Chief of Police

EDUCATION

M.A. Public Administration (MPA)

Florida Atlantic University – Boca Raton, FL

B.A. Business Administration (BBA)

Florida Atlantic University – Boca Raton, FL

Additional:

Federal Bureau of Investigation National Academy FBI Training Academy - Quantico, VA

Post Graduate Studies – Criminal Justice Education, University of Virginia – Quantico, VA

Certifications: Management Development Certification; Certified Government Financial Manager;

Florida Executive Development Seminar; Florida Chief's Executive Seminar Class 29; Certificate in

Public Records Management, All FEMA required courses and certifications, ICMA Credentialed Manager

ACTIVITIES SUMMARY

- Association of Government Accountants
- International City Managers Association
- International Association of Chiefs of Police
- Florida City County Manager's Association
- Florida League of Cities
- FBI National Academy Alumni Association
- American College of Forensic Examiners International
- Rotary

ORDINANCE NO. 2022-657

AN ORDINANCE OF THE TOWN OF KENNETH CITY, FLORIDA, CREATING DIVISION 1 OF ARTICLE VII OF CHAPTER 2 OF THE TOWN CODE RELATING TO PROCUREMENT RULES TO ADD NEW PROVISIONS NECESSARY TO FACILITATE EFFICIENT AND LEGALLY COMPLIANT PROCUREMENT ACTIVITIES; MAKING RELATED FINDINGS; AND PROVIDING FOR SEVERABILITY, CODIFICATION, AND AN EFFECTIVE DATE.

WHEREAS, § 5.14 of the Town Charter sets forth the general provisions governing the solicitation and procurement of goods and services for the Town;

WHEREAS, the Town Council possesses the authority to add to and subtract from the Town's Code of Ordinances in a manner consistent with the content of the Town Charter;

WHEREAS, the town's professional procurement staff and the Town Attorney have advised the Town Council that modern public procurement methods have become more complex and, as the Town has grown its procurement rules should be improved to account for the various methods of procurement available to the town, and to ensure compliance with statutes applicable to municipal procurement; and

WHEREAS, in light of the foregoing, the Town of Kenneth City Council finds that it is in the Town's best interests to adopt the new and updated procurement regulations set forth in this Ordinance.

NOW, THEREFORE BE IT ORDAINED by the Town Council of Town of Kenneth City, Florida, that:

SECTION 1. The Town Council hereby creates and codifies Chapter 2, Article VII (Finance), Division 1 (Procurement Code) within Subpart A of the Town's General Ordinances, which shall read as follows:

DIVISION 2. – PROCUREMENT CODE

Sec. 2-401. – Title and purpose.

This division shall be known and may be cited to as the Town of Kenneth City procurement code. The purpose of this division is to provide for the fair and equitable treatment of all persons involved in public purchasing by the town, to maximize the purchasing value of public funds in procurement, and to provide safeguards for maintaining a procurement system of quality and integrity.

Sec. 2-402. – Application.

(a) This division applies to solicitations and contracts entered into for the purchase of goods, services, and construction. Any current or subsequent amendment shall only apply to solicitations and contracts issued and entered into by the town after the effective date of this division, unless the parties agree to its application to solicitations and contracts issued and entered into prior to the effective date.

(b) This division is to be construed in a manner consistent with any applicable provision of the general and special laws of the State of Florida and shall not apply to the extent any provision is in conflict therewith, provided, however, the provisions of this division may supersede such general or special law where the general or special law permits such an application or interpretation.

Sec. 2-403. – Exclusions from this division.

This division does not govern procurement of the following:

(a) *Grants and gifts.* This division shall not apply to purchases made with the proceeds from any grant, gift, bequest, or donation to the extent the application of this division would conflict with the requirements, conditions, or limitations attached to the grant, gift, bequest, or donation.

(b) *Lease or purchase of real property.* This division shall not apply to the acquisition of real property by lease, license or purchase, unless the council determines to acquire such interest by a competitive solicitation.

(c) *Legal services.* This division shall not apply to retaining services of law firms or other outside counsel for any reason, nor to expert witnesses, appraisal services, trial consultants or similar persons of firms deemed by the town council as necessary to address the town's legal needs. Such firms or persons shall be selected by the town council or, when authorized by council, the town attorney.

(d) *Non-profit funding agreements.* Funds expended by the town in the form of grants to non-profit entities performing economic development, social services, or similar public purposes.

(e) Insurance policies. This division shall not apply to the purchase of insurance policies to protect the property and other interests of the town.

(f) Where specified by general law, ordinance or policies. This division shall not apply to any purchase governed by explicit provisions of general law or other town ordinance or council policies unless the solicitation indicates the applicability of this division, and this division shall apply only to the extent set out in the solicitation.

(g) Town bonds. This division shall not apply to professional services required for the issuance of town bonds and town investments related thereto.

(h) Dues, memberships and subscriptions. This division shall not apply to the payment of dues for memberships in professional or trade organizations, professional licenses, and trade publications or subscriptions.

(i) Sale or conveyance of town owned real property. This division shall not apply to the sale, conveyance or other disposition of real property owned by the town or any interest therein.

(j) Legal advertisements and postage. This division shall not apply to the town's acquisition of legal advertisements, nor to the cost of postage, shipping or courier services.

(k) Lobbying services. This division shall not apply to the town's acquisition of professional lobbyist services.

(l) Title abstracts and title insurance. This division shall not apply to funds expended for real property title abstracts or title insurance.

(m) Utilities. This division shall not apply to the town's acquisition of any utility, including electricity, gas, and communications services.

(n) Professional development. This division shall not apply to costs incurred in authorized professional development activities including registration, lodging, travel and meal costs to attend trade or professional seminars, trainings and conferences.

(o) Items for resale. This division shall not apply to the acquisition of items purchased for resale to the public.

(p) Instructional materials. This division shall not apply to the acquisition of instructional materials or copyrighted materials being purchased from the owner of the copyright.

(q) Town sponsored events. This division shall not apply to expenditures related to town sponsored events, including venue and amusement rentals, entertainment and food.

(r) Service/maintenance agreements. Agreements to maintain or service equipment or software previously acquired by the town are not covered by this division.

Notwithstanding the foregoing, with the exception of the acquisition of utility services with rates established by the Florida Public Service Commission, a contract for the purchase of commodities or services exempted in this section must be approved by the council if the contract requires the expenditure of more than \$25,000.

Sec. 2-404. – Small dollar purchases.

Purchases of commodities or services with an aggregate annual cost of less than \$2,500.00 may be made directly by the acquiring department. For purchases of commodities or services with an aggregate annual cost of more than \$2,500, but less than \$5,000, the department head shall first secure two or more written price quotes to be submitted with the requisition, before a purchase order is issued. To the extent the services being acquired may generate a significant risk of loss, the acquiring department shall first consult with the town manager or designee regarding the need to require the vendor to provide enhanced insurance coverage.

Sec. 2-405. – Intermediate purchases.

Purchases of commodities or services with an aggregate annual cost between \$5,000.00 and \$10,000.00 will be acquired only after obtaining a minimum of three (3) written quotes, telephone quotes or proposals. After quotes are received, purchase orders will be issued to the responsive, responsible vendor which has quoted the most acceptable products or services at the lowest cost.

Sec. 2-406. – Purchases requiring formal solicitation.

Purchases of commodities or services with an aggregate annual cost exceeding \$10,000.00 will be performed by the use of a formal invitation to bid, request for proposals, invitation to negotiate or request for qualifications, depending on the desired commodity or service. Solicitations in this category shall be published as broadly as practicable to obtain robust competitive responses, to include online solicitation distribution providers, the town's website, newspaper or trade publication advertisements, and directly sending the solicitation to known vendors.

Sec. 2-407. – Minimum solicitation requirements.

Solicitations for sealed bids shall include specifications and all contractual terms and conditions applicable to the procurement, shall incorporate, directly or by reference to, the standards and conditions upon which the bids will be evaluated and selected, and, in solicitations for other than sealed bids, shall include the manner in which negotiations shall be conducted.

Sec. 2-408. – Cancellation of solicitations.

An invitation for bids, a request for proposals, or other solicitation may be canceled, or any or all bids, proposals or offers may be rejected in whole or in part when it is determined to be in the best interests of the town. The reasons therefor shall be made part of the town's files. Each solicitation issued by the town shall state that the solicitation may be canceled and that any bid, proposal, or offer may be rejected in whole or in part for good cause when in the best interest of the town. Notice of cancellation shall be published or posted in the same manner as notice of the solicitation.

The notice shall identify the solicitation, explain the reason for cancellation and, where appropriate, explain that an opportunity will be given to compete on any resolicitation or any future procurements of similar items.

Sec. 2-409. – Source selection and waiver of competition.

(a) The methods and policies governing the selection of sources shall be those established in this division, or by administrative procedures and standards adopted by the town council, and may include, but shall not be limited to, competitive sealed bids, proposals, requests for qualifications, invitations to negotiate, proposals submitted for competitive negotiation, proposals for designated professional services, noncompetitive purchases, purchases with limited competition, emergency purchases, sole source purchases, piggyback and cooperative purchases, and any adopted exceptions to the competitive selection procedure.

(b) Where not otherwise prohibited by law, the town council is authorized to provide for the limited or complete waiver of competitive source selection policies and procedures upon a determination that the likely, non-speculative cost of competitive purchasing would exceed any potential savings and benefit to the town, or upon a determination that the acquisition of the goods or services should be provided by a unique source or provider based upon particular skills and expertise. Waivers may also be authorized by the town council for any purchase where emergency conditions or urgent demands for commodities or services render competitive source selection policies an obstacle to the timely fulfillment of the Town's ordinary functions and duties. Recommendations to the town council for all such determinations shall be made in writing. In the event emergency conditions prohibit the convening of the town council to grant a waiver of competition and compliance with normal procurement procedures, the town manager is authorized to approve of such a waiver. Procurement activities which otherwise would have required town council approval must be ratified by the council at its first regular meeting after the emergency condition has ceased.

Sec. 2-410. – Construction contracts.

(a) If a contract for construction of buildings or infrastructure is estimated, in accordance with generally accepted cost accounting principles, to cost more than the threshold amounts set forth in Florida Statutes § 255.20, such contract shall be competitively awarded to a licensed contractor fully legally authorized to conduct business in Florida by use of the competitive solicitation rules set forth in that statute.

(b) The selection procedures shall be consistent with this division and policies and procedures adopted by the town council. In addition to such other solicitation publication methods used by the town, construction projects projected to cost more than \$200,000 must be advertised in the manner set forth in Florida Statutes § 255.0525(2)-(5).

(c) Projects shall not be divided so as to evade the threshold amounts listed in Florida Statutes § 255.20. Unless otherwise defined by law, as used in that subsection, the term "project" shall not include those portions of multiyear capital improvement projects not funded beyond the current fiscal year. The term shall also not include any series of construction activities on a new or existing town facility which, if aggregated, would exceed the threshold amounts, but which were not

undertaken contemporaneously with each other, were not part of an overall coordinated construction or renovation effort, and which were not performed under the same construction permit.

Sec. 2-411. – Certain professional services.

(a) Unless prevented from doing so based on a valid public emergency, when the town procures architecture, professional engineering, landscape architecture, or registered surveying and mapping services, it shall, when such services must be procured for a project, the basic construction cost of which is estimated by the town to exceed the category five threshold amount, or for a planning or study activity when the fee for professional services exceeds the threshold amount provided in category two, as those categories are set forth in Florida Statutes § 287.017, engage in the competitive solicitation process set forth in Florida Statutes § 287.055.

(b) Nothing in subsection (a) above shall be construed to prohibit a continuing contract, as defined by Florida Statutes § 287.055(2)(g), between an architecture, professional engineering, landscape architecture, or registered surveying and mapping services firm and the town.

Sec. 2-412. – Design-build procedures.

(a) *Public announcement.* The town shall publicly advertise in a uniform and consistent manner on each occasion when design-build services are required except in cases of public emergencies as declared by the town council. The advertisement shall include a general description of the project and shall indicate how, and the time within which, interested design-build firms may apply for consideration.

(b) *Legal qualification.* Any firm or individual desiring to provide design-build services to the town must first be determined legally qualified. To be legally qualified:

(1) Firms must be properly certified to engage in contracting through a certified or registered general contractor or a certified or registered building contractor as the qualifying agent;

(2) Firms must be properly certified to practice or to offer to practice engineering, architecture, or landscape architecture; and

(3) The firm shall be duly qualified to perform its proposed service under any other applicable law.

(c) *Selection committee.* A selection committee appointed by the town manager and including the town manager, or designee, shall be used to evaluate and rank the design-build firms and their responses for recommendation to the town council.

(d) *Solicitation.* The town manager or the town manager's designee shall develop a request for proposals (RFP) to solicit proposals from interested, qualified design-build firms. Except as

otherwise provided in Florida Statutes § 287.055(9)(c), with the use of a qualifications-based selection process, the RFP shall contain as a minimum the following:

(1) The design criteria package defined in Florida Statutes § 287.055(2)(j).

(2) The criteria, procedures, and standards for the evaluation of design-build contract proposals, based on price, technical and design aspects of the public construction project, weighted for the subject.

(3) Requirements for determining qualifications of firms proposing, such as license, list of subcontractors, architect and engineer, and references.

(4) Terms and conditions of proposed agreement.

(5) Other items as required by procedures, laws, ordinances, or prevailing circumstances.

(e) Selection.

(1) All information required by the RFP shall be submitted in a sealed manner (which may include sealed envelope if the submission is required to be in that form or via an electronic proposal submission system if the town requires submission in that manner). Except as otherwise provided in Florida Statutes § 287.055(9)(c), with the use of a qualifications-based selection process, all proposed designs and price proposals shall be submitted separately via the same sealed submission process and which will be opened and considered by the selection committee for shortlisted firms only.

(2) The selection committee shall review all proposals (except the separately-submitted proposed designs and price proposals) and shall create a shortlist of no less than three design-build firms as the most qualified, based on the qualifications, availability, and past work of the firms, including the partners or members thereof. In evaluating the proposals and preparing the shortlist, the committee shall consult with the design criteria professional concerning the evaluation of the responses submitted by the design-build firms. Once the committee has shortlisted, except as otherwise provided in Florida Statutes § 287.055(9)(c), with the use of a qualifications-based selection process, the committee shall open the separate envelopes containing the proposed design solutions and the price submitted by the shortlisted firms. The committee shall then rank the shortlisted firms based upon the evaluation criteria and procedures set forth within the request for proposal. The committee may, if necessary, require verbal presentations from all firms in order that the qualifications and/or proposals may be clarified.

(3) After the committee has ranked the shortlisted firms based upon the award criteria set forth within the request for proposal, the ranking shall be presented to the town council which may approve, disapprove or request modifications to the recommended rankings be brought back at a subsequent meeting. Following the ranking by the town council, the town's procurement staff (assisted as needed by relevant town staff and professional consultants) shall attempt to negotiate a contract within the parameters of the design criteria

package or the results of the qualifications-based selection process and in accordance with town council ranking.

(f) Contract.

(1) Under the oversight of the town manager, the town's procurement staff (assisted as needed by relevant town staff and professional consultants) shall negotiate a design-build contract at a price which the town manager determines is fair, competitive and reasonable. If the town is unable to negotiate a satisfactory contract with the first ranked firm, then it shall formally terminate negotiations with such firm and then undertake negotiations with the second ranked firm and shall continue this process until a satisfactory contract is negotiated.

(2) The contract negotiated by the staff shall be submitted to the town council for consideration and approval.

(g) Public emergencies. If a public emergency is declared by the town council and a design-build procurement must proceed during such emergency, a negotiating committee may be formed by the town manager and authorized to negotiate with the best qualified design-build firm available at that time for the design and construction of a capital project. To the extent practical, the town shall solicit letters of interest in order to determine the best qualified design-build firm available at the time. The contract negotiated by such committee shall be subject to the approval of the town council.

(h) Conflict between procedure and law. In the event Florida Statutes § 287.055 is subsequently amended such that its requirements conflict with the provisions of this procedure, the provisions of the statute shall prevail and the town manager shall make such recommendations for revision to these procedures as to conform them to the law.

Sec. 2-413. – Sole source procurement.

(a) Commodities or contractual services. Commodities or contractual services available only from a single source may be excepted from any otherwise applicable solicitation requirements provided in this code. When the town believes that desired commodities or contractual services are available only from a single source, the purchasing agent shall electronically post a description of the commodities or contractual services sought for a period of at least five (5) business days. The description must include a request that prospective vendors provide information regarding their ability to supply the commodities or contractual services described. Posting shall not be required for desired small dollar commodities or contractual services. If it is determined in writing by the purchasing agent after reviewing all relevant information, including information received from prospective vendors as a result of a required posting, that the commodities or contractual services are in fact available only from a single source, the town may enter into a sole source agreement.

(b) Construction materials. In any case where the town seeks to purchase materials for the construction, modification, alteration, or repair of any town-owned facility from a sole source, the town council must first make the written findings required by Florida Statutes § 255.04.

Sec. 2-414. – Cooperative procurement, piggybacking.

(a) Cooperative procurement. Unless otherwise prohibited by law or grant agreement terms, the purchasing agent is authorized to negotiate with other public procurement officials for the conduct of a joint procurement on behalf of each participating public agency where, in the judgment of the town manager, doing so would leverage the benefits of volume purchases, create clear delivery and/or supply chain advantages, and/or create a demonstrable and substantial reduction of administrative time and expense. Examples of cooperative procurement events can include joint solicitations or use of a third-party aggregator or broker.

(b) Piggybacking.

- (1) In any agreement for the acquisition of goods or services between the town and a vendor which has resulted from a competitive solicitation process, the purchasing agent is authorized to include a term authorizing the agreement to be utilized by other public agencies to acquire the same goods or services.
- (2) The purchasing agent is authorized to acquire goods or services by use of an existing agreement between a vendor and another public agency where such agreement has resulted from a competitive solicitation process. Purchases made in this manner should not substantially differ in specification, scope, quality or price from the terms of the initial agreement. The piggybacking agreement must be consistent with the parameters, requirements and restrictions of the initial agreement.

Sec. 2-415. – Best value procurement.

Unless otherwise prohibited by law, in addition to soliciting commodities or services based on a lowest responsive responsible bidder standard, the purchasing agent is authorized to conduct a solicitation based on best value. The value of procured commodities or services is generally determined by a comparison of costs and benefits. These include comparison of all the benefits from what the town receives and how it uses what it receives, against the costs to purchase, use, and where relevant dispose of it. Value includes the costs and resources necessary to conduct the procurement, purchase price, fiscal tracking and processing costs, storage, maintenance and other operational costs, costs for needed training and special insurance costs. The factors to be considered and statement of who will be evaluating the factors shall be included or referenced in any solicitation issued using the best value procurement method.

Sec. 2-416. – Public records compliance.

Pursuant to Florida Statutes, Section 119.0701, in any agreement entered into by the town wherein the contractor is acting on behalf of the town, the contractor must:

- (a) Keep and maintain public records that ordinarily and necessarily would be required by the town in order to perform the service.

(b) Provide the public with access to public records on the same terms and conditions that the town would provide the records and at a cost that does not exceed the cost provided in Florida Statutes, Chapter 119 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.

(d) Meet all requirements for retaining public records and transfer, at no cost, to the town all public records in possession of contractor upon termination of the agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the town in a format that is compatible with the town's information technology systems.

Sec. 2-417. – Trade secrets.

(a) Florida law provides that trade secret information, as defined in Florida Statutes § 812.081(1)(c), is confidential and exempt from public records disclosure.

(b) Upon receipt of a response to a procurement solicitation, the town will not be aware that a bid, proposal, or other response contains such information. Therefore, bidders, proposers or other persons or entities responding to town solicitations must specifically and clearly identify all portions of their responses which are believed to be a trade secret, as defined by the law, and must, as to each such designation, provide the basis upon which the designated information is a trade secret. The mere designation of an entire submission as “confidential” will be insufficient to comply with this requirement. Absent some unusual justification, a bidder's or proposer's contract price shall not constitute a trade secret.

(c) While the town will, to the extent possible, cooperate in any court action a bidder, proposer or responder may bring against any third-party requesting to inspect and copy portions of a response asserted to be a trade secret, if a bidder, proposer or responder fails, prior to the submission of their materials to the town, to specifically and clearly designate information therein as a trade secret and to provide the supporting explanation for the designation, the right to assert the exemption may be lost, and the information may be subject to inspection and copying as otherwise provided for under Florida's Public Records Act.

(d) In the event any record designated as a trade secret is requested under the Act, procurement staff will consult with the town's legal counsel and, if the town's legal counsel agrees with the designation, the town will assert the exemption and redact the relevant materials. If the town's legal counsel disagrees with the designation, town staff will inform the bidder, proposer or responder and that person or entity may file an injunctive or declaratory judgment action and seek such emergency orders as desired to protect the information.

Sec. 2-418. – Unauthorized purchases, ethical conduct, sanctions.

(a) Prohibition. Except as provided in this division, it shall be a violation of this division for any town officer, employee, or other person, to knowingly and willingly order the purchase of any goods, or make any contract for goods or services, sell, trade or dispose of material within the purview of this division in the name of or on behalf of the town, except as provided by policies of the town council, and the town shall not be bound by any purchase order or contract made contrary to the provisions herein.

(b) Ethical conduct and sanctions. In addition to any sanctions provided for in the town's personnel policies or sections of this code, any town employee who violates subsection (a) above, or any statute concerning ethical conduct in procurement may, when found by the town manager to have committed such violation, be required to forfeit all or any part of any accrued leave balances he/she may otherwise have as of the date the violation is confirmed by the town manager. In determining whether such forfeiture shall be required, the town manager shall consider the nature and severity of the offense, the relative financial or legal harm to the town, the employee's prior disciplinary record and whether the employee was in a managerial or special trust position.

Sec. 2-419. – Conflicts of interest.

(a) Prohibiting contracts where conflicts are found to exist. The town shall not engage in contracts with consultants or professionals whose prior record, work history and experience indicate ongoing business relationships that may be substantially in conflict with the duties and services that will be required by the town.

(b) Standards and regulations for the determination of potential conflicting contractual obligations. The town manager or designee shall develop standards and regulations for the prospective determination of potential conflicting contractual obligations that may impair the performance of the professionals or consultants solicited by the town. The standards and regulations shall set forth appropriate requirements based upon the nature and scope of the services that are to be procured and shall be narrowly tailored so as to not unduly restrict competition, while assuring the town of undivided loyalty and services of the highest quality. The standards and regulations may require, but shall not be limited to, the inclusion of the following in a request for proposals, invitation for bids, announcement or other solicitation or contract for professional or consulting services:

- (1) An affidavit providing that the professional or consultant is not currently engaged or will not become engaged in any obligations, undertakings or contracts that will require the professional to maintain an adversarial role against the town or that will impair or influence the advice or recommendations provided to the town;
- (2) The disclosure of all potentially conflicting contractual relationships and the full disclosure of contractual relationships deemed to raise a serious question of conflicts.

(c) Consequences for violation of ethical standards. In addition to any other penalty or consequence provided for in law or this code, any professional or consultant submitting false

information to or on behalf of the town, disclosing or releasing information concerning an actual or planned procurement activity which information is deemed confidential or is otherwise not known to the general public or otherwise repeatedly failing to comply with the town's ethical standards and regulations shall be deemed to be in violation of this code and shall be subject to prosecution, state ethics complaints, reporting to professional or licensing authorities, contract cancellation, suspension or debarment, or any combination thereof, as the town deems appropriate.

(d) Professional and consultant defined. Professional or consultant as used in this section shall be deemed to include those contractors who, as individuals or duly organized business entities, have been or will be retained by the town for the purpose of providing recommendations or advice related to planning level or policy level decisions, or who will be engaged in the collection of data or research that will provide the basis for such decisions or future plans and actions of the town, as well as those who will be retained to supervise and monitor the performance of contractors or subcontractors of any nature.

Sec. 2-420. – Lobbying limitations.

After the issuance of any solicitation, or during renegotiation of an existing contract, no prospective offerors or their agents, representatives or persons acting at the request of such offerors shall contact, communicate with, or discuss any matter relating to the solicitation or the renegotiation with any town officers, agents or employees other than the designated purchasing agent, unless otherwise provided for in the solicitation or otherwise directed by the purchasing agent. This prohibition includes copying such persons on written communications with the purchasing agent, but does not apply to presentations made to evaluation committees or at a town council meeting where the council is considering approval of a proposed contract, and ends upon execution of the final contract or when the solicitation has been canceled or the renegotiation efforts are terminated. Renegotiation will be deemed to have commenced upon vote of the council directing renegotiation or written notice from the purchasing agent to the existing contractor instituting a renegotiation process. Failure to adhere to this section will result in the offender's bid or proposal being disqualified from further consideration.

Sec. 2-421. – Prohibition against award to certain persons or entities.

No person or business entity shall be awarded a contract by the town for the provision of commodities or services if that person or entity:

(a) Has been convicted of bribery or attempting to bribe a public officer or employee of the town, the State of Florida, or any other public entity, including but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(b) Has been convicted of a conspiracy or collusion among prospective offerors in restraint of freedom of competition, by agreement to offer a fixed price, or otherwise; or

(c) Has been convicted of a violation of an environmental law that, in the reasonable opinion of the town manager, establishes reasonable grounds to believe the person or business entity will not conduct business in a responsible manner; or

(d) Has made an admission of guilt of such conduct described in subsections (a), (b) or (c) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution.

Sec. 2-422. – Protests.

(a) Purpose and intent. The purpose of this section is to provide an expedient administrative remedy for those participating in the town’s procurement process. The proceedings under this section are not intended to be, and shall not be interpreted as judicial or quasi-judicial, unless otherwise clearly specified. It is not the intent of the town to provide any rights to protesters not otherwise required by law. Rather, the town’s intent in creating a process for administrative review of solicitation award protests is to allow for errors in the solicitation process to be raised for the benefit of the taxpayers. Successful participation in any protest review does not ensure an award of a contract, and the town expressly reserves all rights it has under law.

(b) Opportunity to protest. Any actual bidder, proposer, or contractor who is aggrieved in connection with the notice of intent to award a contract (protestor), where such grievance is asserted to be the result of a violation of the requirements of this procurement code or any applicable provision of law by the officers, agents, or employees of the town, may file a protest to the procurement agent.

(c) Protest procedure and requirements.

(1) The protest shall be made in writing and filed with the procurement division by 4:00 p.m. on the fifth business day following the date of the electronic posting of the notice of intent to award. A protest is considered filed upon receipt by the procurement office. Failure to file a written protest within the time period specified shall constitute a waiver of the right to protest.

(2) The written protest shall identify the protesting party and the solicitation involved, including a statement of the grounds on which the protest is based and the applicable statutes, laws, ordinances or other legal authorities which the protestor deems applicable to the grounds for the protest.

(3) The protest shall not include challenges to the solicitation requirements, chosen procurement method, the evaluation criteria, the relative weight of the evaluation criteria, the formula specified for assigning points to the evaluation criteria in its protest, or the protestor’s opinion regarding its qualifications or the qualifications of other responding vendors.

- (4) The procurement process shall not be stayed during the protest process unless the procurement agent, in his or her discretion, deems it to be in the best interests of the town to stay the process.
- (d) Authority to resolve protests. The procurement agent shall have the authority to settle and resolve a protest concerning the intended award of a contract. The procurement agent shall promptly investigate the protest and issue a written decision within thirty (30) days of the date the protest is received.
- (e) Review of the procurement agent's protest decision.
- (1) Following the procurement agent's written decision on the protest, protestor may file a request for a review of the procurement agent's decision with the town manager. The request for review shall be made in writing and filed with the procurement office by 4:00 p.m. on the fifth business day following notification of the procurement agent's decision.
- (2) The town manager shall issue a written decision within thirty (30) days of the date the request for review is received.
- (f) Final decision. The decision of the town manager shall be final and conclusive as to the protest.
- (g) Protest bond or security. The town council may, by separate resolution, establish a requirement for a protest bond. If a protest bond is required, the written protest must be accompanied by a security in the form of a protest bond (in a form and with such terms as approved by the town attorney) or cash in the amount set by the council. If the town manager determines that the protest does not require reversal of the town's initial decision, the town shall be entitled to recover the amount of the protest bond or security.

SECTION 2. For purposes of codification of any existing section of the Town of Kenneth City Code herein amended, words **underlined** represent additions to original text, words **~~stricken~~** are deletions from the original text, and words neither underlined nor stricken remain unchanged.

SECTION 3. If any section, subsection, sentence, clause, provision or word of this Ordinance is held unconstitutional or otherwise legally invalid, same shall be severable and the remainder of this Ordinance shall not be affected by such invalidity, such that any remainder of the Ordinance shall withstand any severed provision, as the town Council would have adopted the Ordinance and its regulatory scheme even absent the invalid part.

SECTION 4. The Codifier shall codify the substantive amendments to the Town of Kenneth City Code contained in Section 1 of this Ordinance as provided for therein, and shall not codify the exordial clauses nor any other sections not designated for codification.

SECTION 5. Pursuant to Florida Statutes § 166.041(4), this Ordinance shall take effect immediately upon adoption.

ADOPTED ON FIRST READING on the ___ day of _____, 2022, by the Town of Kenneth City Council.

ADOPTED ON SECOND AND FINAL READING on the ___ day of _____, 2022, by the Town of Kenneth City Council.

Robert Howell, Mayor

ATTEST:

Ana Cabezas, Town Clerk



TOWN OF KENNETH CITY

A SAFE, FRIENDLY SMALL TOWN

6000 54th Avenue North - Kenneth City, Florida 33709

Phone : (727) 498-8948 | Fax : (727) 498-8841

town57@kennethcityfl.org | www.kennethcityfl.org

TO: TOWN CLERK

From: Gary Strait, Plans Examiner

Subject: Permits & Fees For: **May 2022**

Number of Permits Issued: **34**

Total Fees Collected: \$ **4333.71**

The Following Permits Were Issued:

Building 19

Electric 3

Mechanical 3

Plumbing 2


Engineering 6

Landscaping 1

Gas 0

Fire 0

Sign 0

 6/1/22

DATE	ADDRESS	APPLICANT	OWNER	PERMIT #	TYPE	DESCRIPTION	ISSUE DATE	VALUATION	PLAN REVISION	DCADDBPT 1 & 2 FEE	PERMIT FEE	TOTAL
05/02/22	4020 55TH ST #1106	BAY AREA BUILDS	WRIGHT	22-05-001	BLDG	DOOR REPLACEMENT	05/02/22	\$3,000.00	\$25.00	\$0.00	\$4.00	\$3,029.00
05/03/22	6400 46TH AVE #210	BAYSIDE MECHANICAL	MESSINA	22-05-002	MECH	MECHANICAL REPLACEMENT	05/03/22	\$4,500.00	\$0.00	\$4.00	\$2.00	\$4,506.00
05/03/22	6400 46TH AVE #108	BAYSIDE MECHANICAL	MESSINA	22-05-003	MECH	MECHANICAL REPLACEMENT	05/03/22	\$5,000.00	\$0.00	\$4.00	\$2.00	\$5,010.00
05/03/22	6022 50TH AVE	EXCEL HOME SOLAR	WISSLER	22-05-004	BLDG	SOLAR PV SYSTEM	05/03/22	\$24,000.00	\$97.50	\$0.00	\$6.31	\$155.81
05/03/22	6022 50TH AVE	EXCEL HOME SOLAR	WISSLER	22-05-004	ELEC	SOLAR PV SYSTEM	05/03/22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
05/05/22	5716 44TH AVE	J & G CARPENTRY	DOESCHER	22-05-005	BLDG	DOOR REPLACEMENT	05/05/22	\$1,595.00	\$22.50	\$0.00	\$4.00	\$45.50
05/05/22	4912 56TH WAY	J & G CARPENTRY	MILLER	22-05-006	BLDG	DOOR REPLACEMENT	05/05/22	\$1,126.00	\$22.50	\$0.00	\$4.00	\$76.50
05/05/22	5686 46TH AVE	ICON ENERGY	VAZQUEZ	22-05-007	ELEC	SOLAR PV SYSTEM	05/05/22	\$56,602.00	\$161.50	\$0.00	\$12.11	\$283.00
05/05/22	5986 46TH AVE	ICON ENERGY	VAZQUEZ	22-05-007	ELEC	SOLAR PV SYSTEM	05/05/22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
05/05/22	5717 45TH AVE	HOMEOWNER	RHINE	22-05-008	ENG	DRIVEWAY REPLACEMENT	05/05/22	\$2,000.00	\$0.00	\$0.00	\$0.00	\$50.00
05/06/22	6115 45TH AVE	BILLY THE SUNSHINE PLUMBER	BERG	22-05-009	BLDG	ROOF REPLACEMENT	05/06/22	\$3,500.00	\$0.00	\$0.00	\$0.00	\$55.00
05/10/22	6400 46TH AVE #19	HOMEOWNER	BEACH	22-05-010	PLBG	WATER HEAR C/O	05/10/22	\$1,200.00	\$0.00	\$0.00	\$4.00	\$46.00
05/10/22	5923 48TH AVE	HOMEOWNER	KASSIS	22-05-011	LAND	TREE REMOVAL	05/10/22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
05/10/22	4225 58TH ST	HOMEOWNER	YOUNG	22-05-012	ENG	DRIVEWAY REPLACEMENT	05/10/22	\$6,500.00	\$0.00	\$0.00	\$0.00	\$90.00
05/10/22	5846 54TH AVE	PROFESSIONAL ROOF SERVICES	ARENA N G LLC	22-05-013	ENG	FENCE	05/10/22	\$2,500.00	\$0.00	\$0.00	\$0.00	\$50.00
05/11/22	4823 58TH WAY	HOMEOWNER	BARRIOS	22-05-015	BLDG	ROOF REPLACEMENT	05/11/22	\$89,000.00	\$35.00	\$0.00	\$11.28	\$472.28
05/12/22	6132 51ST AVE	J & G CARPENTRY	BURROWS	22-05-016	BLDG	DOOR REPLACEMENT	05/12/22	\$4,289.00	\$30.00	\$0.00	\$4.00	\$89.00
05/12/22	4333 51ST LN	FLORIDA ENERGY WATER & AIR	LI	22-05-017	PLBG	WATER HEATER	05/12/22	\$1,235.00	\$0.00	\$0.00	\$4.00	\$46.00
05/13/22	4143 57TH ST #901	ACREE AIR	BEAVER	22-05-018	MECH	A/C CHANGE OUT	05/13/22	\$7,309.00	\$0.00	\$0.00	\$4.00	\$46.00
05/13/22	5825 54TH AVE	LEONARD CONTRACTORS INC	ANVEN LEARNING	22-05-019	BLDG	COMM. RENO CHANGE OF USE	05/13/22	\$15,000.00	\$55.00	\$0.00	\$4.13	\$110.00
05/13/22	5860 43RD AVE	HOME PERFORMANCE ALLIANCE	SCHRAEDER	22-05-020	BLDG	WINDOW REPLACEMENT	05/13/22	\$38,400.00	\$115.00	\$0.00	\$6.63	\$120.00
05/19/22	5801 54TH AVE	KTM EXTERIORS & RECYCLING	S N S PROPERTY	22-05-021	BLDG	ROOF REPLACEMENT	05/19/22	\$16,995.00	\$0.00	\$0.00	\$4.00	\$134.00
05/20/22	5852 48TH ST	M & V CONSTRUCTION SERVICES	CANNING	22-05-022	BLDG	ROOF REPLACEMENT	05/20/22	\$8,800.00	\$0.00	\$0.00	\$4.00	\$89.00
05/20/22	5570 57TH WAY	HOMEOWNER	WYZNISKI	22-05-023	BLDG	ROOF REPLACEMENT	05/20/22	\$871.00	\$0.00	\$0.00	\$4.00	\$46.00
05/23/22	5132 LAKE CHARLES DR	POLYMAHCONSTRUCTION GROUP	SUERTE	22-05-024	BLDG	ROOF REPLACEMENT	05/23/22	\$8,000.00	\$0.00	\$0.00	\$4.00	\$89.00
05/23/22	4339 58TH ST	FENCE OUTLET OF TAMPA INC	HILL	22-05-025	ENG	FENCE	05/23/22	\$5,400.00	\$0.00	\$0.00	\$0.00	\$65.00
05/25/22	4911 60TH ST	WEST COAST FENCE	EAGLE	22-05-026	ENG	FENCE	05/25/22	\$3,696.00	\$0.00	\$0.00	\$0.00	\$70.00
05/26/22	6400 48TH AVE #115	CCI HOLDINGS	HAMMONDS	22-05-028	ENG	DRIVEWAY REPLACEMENT	05/26/22	\$12,000.00	\$0.00	\$0.00	\$0.00	\$55.00
05/26/22	4777 61ST LN	COURTESY ELECTRIC INC	ANDERSON	22-05-029	ELEC	REPLACE PANEL	05/26/22	\$1,000.00	\$0.00	\$0.00	\$0.00	\$100.00
05/26/22	4713 61ST WAY	PRECISION DOOR	SELDEN	22-05-030	BLDG	GARAGE DOOR	05/26/22	\$2,148.00	\$25.00	\$0.00	\$4.00	\$2.00
05/27/22	6400 48TH AVE #207	SUMMER BREEZE ROOFING	CAMPBELL	22-05-031	BLDG	ROOF REPLACEMENT	05/27/22	\$15,770.00	\$0.00	\$0.00	\$4.00	\$5.00
05/27/22	5569 56TH WAY	ARTISTIC HARDCAPE	PAULSEN	22-05-032	BLDG	BATH REMODEL	05/27/22	\$7,800.00	\$77.50	\$0.00	\$5.81	\$10.00
05/27/22	5569 56TH WAY	ESD SOLAR SOLUTIONS	VITEL	22-05-033	BLDG	SOLAR PV SYSTEM	05/27/22	\$37,718.00	\$152.50	\$0.00	\$11.44	\$305.00
								\$819.00	\$0.00	\$0.00	\$131.71	\$3,209.00

TO: Mayor Robert Howell and Council
FROM: Peter Cavalli, Town Manager
DATE: June 3, 2022
RE: Agreement for Professional Municipal Management and Executive Services

SUMMARY

The Town is seeking full-service management consulting support to assist the Town through the current transition to leadership.

DISCUSSION

Attached are two options. One is the Agreement for Professional Municipal Management and Executive Services submitted by Imagine that Performance, LLC. The second is to go through an RFP process as described in the attached memo under the title of DMS Management Consulting Firms.

CONCLUSION

Staff respectfully requests direction from council on which option they choose, if any, to move forward with the selection of a firm to provide Management Consulting and Operations Support Services.

TO: Mayor Robert Howell and Council
FROM: Peter Cavalli, Town Manager
DATE: May 31, 2022
RE: Florida DMS | Management Consultants

DISCUSSION

The Town's current Financial Procedures Policies require that expenditures over \$10,000.00 be authorized by Town Council after the issuance of a request for proposal or bid and the receipt of sealed bids or proposals.

This issue may be moot in some respects, following the approval of the second reading of Procurement Ordinance No. 2022-657, that was presented by Attorney Mora at the May Council Meeting. However, Town Management feels it is wise to present council with options related to the selection of a full-service Management Consulting Firm and to show what is available on the marketplace.

Specifically, the current Financial Procedures Section 5.14 states "In working within the confines of Article V-Financial Procedures Section 5.14 – Price Quotes; sealed bids; exceptions Line Item C – "Expenditures in excess of ten thousand dollars (\$10,000.00). The approval of town council shall be required to authorize and expenditure in excess of ten thousand dollars (\$10,000.00) for goods, materials, equipment or services after the issuance of a request for proposal or bid and the receipt of sealed bids or proposals, which shall be publicly opened in a manner set forth in an administrative policy established by the town manager for bidding expenditures in excess of ten thousand dollars (\$10,000.00)."

The State of Florida Department of Management Consulting Services – State Term Contract 80101500-20-1 effective from 3/1/2021 through 2/29/2024, has nearly 60 Management Consulting Firms Identified. The list of contractors, pricing, how to use this contract, contractor by service and job titles/duties are all attached for Council's review. – For additional references, please visit: https://www.dms.myflorida.com/business_operations/state_purchasing/state_contracts_and_agreements/state_term_contracts/management_consulting_services

Several of these management consulting firms have a focus on General Management, Accounting/Finance, and Technology foci.

Examples of general management firms include but are not limited to Accenture, LLP, Transpro Consulting and MGT of American Consulting, LLC.

Examples of accounting/finance include but are not limited to Deloitte Consulting, LLP, Ernst & Young US, LLP, Cost Management, Inc.

Examples of technology consultants include Meridian Partners, Advanced Systems Design and Atkins.

This agenda item is being presented to council to aid in the selection of a Full-Service Management Consultant.

Town Management found that the State of Florida has nearly sixty (60) Management Consultant Firms identified. The list of these firms is attached for Council's Review.

This state term contract provides management consulting services at an hourly rate. Pricing is provided for five job titles: Principal Consultant, Senior Consultant, Consultant, Junior Consultant, and Program and Administrative Support. The following services are available under this contract:

- Consulting on Management Strategy
- Project Management
- Program Research, Planning, and Evaluations
- Provision of Studies, Analyses, Scenarios, and Reports relating to a Customer's mission-oriented business programs or initiatives
- Executive/Management Coaching Services
- Customized Training as needed to achieve a Management Consulting Objective
- Assistance with Policy and Regulation Development
- Assistance with Process and Productivity Improvement
- Expert Witness Services in Support of Litigation, Claims, or Other Formal Cases Relating to Management Consulting
- Advisory and Assistance Services Relating to a Customer's Mission-Oriented Business Programs or Initiatives
- Systems Alignment and Consolidation
- Comprehensive Grants Management Services Related to the Stafford Act and other related State and Federal Grant Programs

Please note that the Town, if the Town chooses to go this route, it would need to go through a procurement process that will likely take 45 days. As you know a scope has to be developed and advertised. Submissions will also need to be evaluated by a Town Manager (or Interim) and presented to Council as per applicable procurement policies.

Management Consulting Services (80101500-20-1)

Job Titles and Duties

This document describes the responsibilities of the personnel provided by the Contractor, in accordance with the terms of the Contract, who are used to provide Customers with services pursuant to the Customer SOW set forth in the Customer's PO (Customers may supplement these duties in their Customer SOWs provided the duties do not exceed or conflict with the Contract).

1. *Principal Consultant:* A minimum of ten (10) years' experience in duties associated with MCS is required for Principal Consultant positions. The functional responsibilities of this position may include, but are not limited to:
 - Providing executive-level consultation services to the Customer
 - Providing senior-level interface with the Customer and managing daily operations
 - Ensuring the timely performance and completion of all obligations under the PO
 - Organizing and directing the overall performance of the Customer PO
 - Possessing the authority to make binding decisions on behalf of the Contractor
 - Formulating organizational strategy and directing major strategic initiatives
 - Ensuring that goals and objectives are accomplished within budgetary parameters
 - Developing and maintaining Customer relationships
 - Assisting on large, complex or multi-discipline engagements
 - Allocating financial and human resources and material assets
 - Formulating and enforcing work standards
 - Participating in the design phase of tasks and ensuring their successful execution

2. *Senior Consultant:* A minimum of ten (10) years' experience in duties associated with MCS is required for Senior Consultant positions. The functional responsibilities of this position may include, but are not limited to:
 - Managing the day-to-day operations
 - Ensuring the quality and timely completion of projects or services
 - Providing technical and subject matter expertise in fulfillment of Customer SOWs
 - Participating as a senior team member providing high-level consulting services
 - Planning, organizing, and executing tasks in successful delivery of projects or services
 - Developing and defining strategic visions
 - Planning, directing, controlling, scheduling, coordinating, and organizing management of tasks
 - Providing Customer interface in fulfillment of Customer SOWs
 - Possessing authority and responsibility for the execution of Customer SOWs
 - Planning, organizing, and overseeing all subordinate work efforts
 - Ensuring quality standards and work performance on Customer SOWs
 - Organizing, directing, and managing support services

3. *Consultant:* A minimum of five (5) years' experience in duties associated with MCS is required for Consultant positions. The functional responsibilities of this position may include, but are not limited to:
 - Applying administrative, consultative, and technical expertise in fulfillment of Customer SOWs
 - Planning, organizing, executing, and controlling project tasks in successful delivery of projects or services
 - Interfacing with Customer on a day-to-day basis to ensure timely delivery of project or services
 - Applying a broad set of management skills and technical expertise as a project leader
 - Providing solutions through analysis
 - Directing subordinates in the completion of tasks orders
 - Organizing, directing, and managing support services
 - Assigning tasks and overseeing projects or other services under the Customer SOWs
 - Directing activities in fulfillment of Customer SOWs
 - Training Customer personnel through formal classroom courses, workshops. or seminars

4. *Junior Consultant:* A minimum of three (3) years' experience in duties associated with MCS is required for Junior Consultant positions. The functional responsibilities of this position may include, but are not limited to:
 - Applying a broad set of subject matter and technical expertise
 - Directing projects or services under the Customer SOWs within estimated timeframes and budget constraints
 - Organizing, directing, and managing support services
 - Serving as a member of a team performing mid-level assignments
 - Providing solutions through analysis
 - Conducting Customer training through formal classroom courses, workshops, and seminars

5. *Program and Administrative Support:* The functional responsibilities of this position may include, but are not limited to:
 - Coordinating and providing administrative support services to Contractor staff and Customer
 - Supporting the provision of services or production of project deliverables and performing administrative functions required to complete tasks
 - Providing graphics and editorial support services and desktop publishing services
 - Maintaining version control of project documents
 - Providing direct support to consulting staff, including supporting the development of all deliverables

**Management Consulting Services (80101500-20-1)
Price Sheet**

Contractor	Principal Consultant (Hourly Rate)	Senior Consultant (Hourly Rate)	Consultant (Hourly Rate)	Junior Consultant (Hourly Rate)	Program and Administrative Support (Hourly Rate)
22ND CENTURY TECHNOLOGIES, INC.	\$160.23	\$142.93	\$137.72	\$98.12	\$78.23
AAJ COMPUTER SERVICES, INC. dba OZ	\$210.00	\$195.00	\$150.00	\$125.00	\$45.00
ACCENTURE LLP	\$420.00	\$355.00	\$265.00	\$180.00	\$65.00
ADVANCED SYSTEMS DESIGN, INC.	\$230.00	\$175.00	\$145.00	\$90.00	\$45.00
ALVAREZ & MARSAL HOLDINGS, LLC	\$522.00	\$470.00	\$437.00	\$377.00	\$0.00
ARCADIS U.S., INC.	\$275.00	\$195.00	\$150.00	\$120.00	\$75.00
ATKINS NORTH AMERICA, INC.	\$288.93	\$234.88	\$182.18	\$140.48	\$85.60
BCA WATSON RICE LLP	\$200.00	\$175.00	\$150.00	\$100.00	\$25.00
BEACON SYSTEMS, INC.	\$155.00	\$135.00	\$105.00	\$65.00	\$25.00
BERRY, DUNN, MCNEIL & PARKER LLC	\$285.00	\$260.00	\$210.00	\$165.00	\$60.00
CAMBRIA SOLUTIONS, INC.	\$243.00	\$200.00	\$155.00	\$111.00	\$40.00
CARR, RIGGS & INGRAM, LLC	\$270.00	\$180.00	\$150.00	\$125.00	\$45.00
CDR MAGUIRE INC.	\$225.00	\$195.00	\$165.00	\$135.00	\$95.00
CIVIC INITIATIVES, LLC	\$230.00	\$185.00	\$155.00	\$135.00	\$110.00
COHNREZNICK LLP	\$200.00	\$190.00	\$165.00	\$135.00	\$75.00
COST MANAGEMENT INC.	\$195.00	\$153.00	\$126.00	\$98.00	\$48.00
CROWE LLP	\$364.73	\$270.94	\$182.37	\$151.11	\$52.11
CSG GOVERNMENT SOLUTIONS, INC.	\$220.00	\$180.00	\$155.00	\$95.00	\$30.00
CSRS, INC.	\$290.00	\$210.00	\$165.00	\$125.00	\$90.00
DELOITTE CONSULTING LLP	\$245.00	\$230.00	\$190.00	\$145.00	\$55.00
DIGITAL INTELLIGENCE SYSTEMS, LLC	\$136.00	\$116.00	\$88.00	\$57.00	\$25.00
ERNST & YOUNG U.S. LLP	\$325.00	\$300.00	\$240.00	\$165.00	\$125.00
FCCM LLC	\$208.00	\$162.00	\$128.00	\$90.00	\$35.00
FEDERAL ENGINEERING, INC.	\$225.00	\$190.00	\$175.00	\$145.00	\$80.00
FIRST DATA GOVERNMENT SOLUTIONS, LP	\$240.00	\$220.00	\$180.00	\$175.00	\$80.00
GARTNER, INC.	\$540.00	\$461.00	\$297.00	\$75.00	\$30.00
GENESIS CONSULTING PARTNERS, LLC	\$210.00	\$175.00	\$145.00	\$105.00	\$85.00
GRANT THORNTON PUBLIC SECTOR LLC	\$335.03	\$237.24	\$155.05	\$110.36	\$97.29
GOVERNMENT SERVICES GROUP, INC.	\$250.00	\$185.00	\$150.00	\$115.00	\$35.00
HAGERTY CONSULTING SERVICES, INC.	\$250.00	\$200.00	\$160.00	\$130.00	\$95.00
HEALTH MANAGEMENT ASSOCIATES, INC.	\$310.00	\$265.00	\$130.00	\$120.00	\$30.00
ICF INCORPORATED, L.L.C.	\$390.00	\$240.00	\$135.00	\$85.00	\$35.00
INFORMATION SYSTEMS CONSULTANTS, INC.	\$120.00	\$100.00	\$85.00	\$70.00	\$60.00
INNOVATIVE EMERGENCY MANAGEMENT, INC.	\$225.00	\$170.00	\$135.00	\$110.00	\$70.00
ISF, INC.	\$250.00	\$195.00	\$140.00	\$90.00	\$40.00
KPMG LLP	\$305.00	\$280.00	\$250.00	\$175.00	\$135.00
MAXIMUS CONSULTING SERVICES, INC.	\$290.00	\$210.00	\$150.00	\$120.00	\$60.00
MERIDIAN PARTNERS, LLC	\$255.00	\$190.00	\$155.00	\$100.00	\$45.00
MGT OF AMERICA CONSULTING, LLC	\$275.00	\$225.00	\$185.00	\$145.00	\$65.00
MORGANFRANKLIN CONSULTING, LLC	\$250.00	\$175.00	\$135.00	\$101.00	\$28.00
NTT DATA STATE HEALTH CONSULTING, LLC	\$250.00	\$225.00	\$175.00	\$150.00	\$120.00
PROCOM CONSULTING, INC.	\$200.00	\$175.00	\$100.00	\$60.00	\$20.00
PUBLIC CONSULTING GROUP LLC	\$295.00	\$275.00	\$230.00	\$180.00	\$115.00
RSM US LLP	\$250.00	\$225.00	\$185.00	\$135.00	\$110.00
SLALOM, LLC	\$224.62	\$203.73	\$182.83	\$161.94	\$141.04
STRATEGIC IT ALIGNMENT GROUP, LLC	\$200.00	\$150.00	\$105.00	\$80.00	\$39.00
TEKSYSTEMS GLOBAL SERVICES, LLC	\$229.00	\$160.00	\$128.00	\$95.00	\$47.00
TELAFORCE, LLC	\$225.00	\$180.00	\$125.00	\$115.00	\$75.00
THE BALMORAL GROUP, LLC	\$260.00	\$150.00	\$100.00	\$80.00	\$60.00
THE NORTH HIGHLAND COMPANY LLC	\$242.00	\$195.00	\$175.00	\$135.00	\$0.00
THOMAS HOWELL FERGUSON P.A.	\$246.00	\$169.00	\$148.00	\$126.00	\$79.00
TIDAL BASIN GOVERNMENT CONSULTING, LLC	\$265.00	\$205.00	\$195.00	\$165.00	\$65.00
TRANSPRO CONSULTING, LLC	\$200.00	\$175.00	\$150.00	\$105.00	\$20.00
WALTER R. MCDONALD & ASSOCIATES, INC.	\$245.00	\$160.00	\$144.00	\$99.00	\$45.00
WHEELER EMERGENCY MANAGEMENT CONSULTING	\$225.00	\$160.00	\$140.00	\$120.00	\$50.00

**Management Consulting Services (80101500-20-1)
Contractors by Service**

Contractor	a) Consulting on Management Strategy	b) Project Management	c) Program Research, Planning, and Evaluations	d) Provision of Studies, Analyses, Scenarios, and Reports relating to a Customer's mission-oriented business programs or initiatives
22ND CENTURY TECHNOLOGIES, INC.	•	•	•	•
AAJ COMPUTER SERVICES, INC. dba OZ				
ACCENTURE LLP	•	•	•	•
ADVANCED SYSTEMS DESIGN, INC.	•	•	•	•
ALVAREZ & MARSAL HOLDINGS, LLC	•	•	•	
ARCADIS U.S., INC.	•	•	•	•
ATKINS NORTH AMERICA, INC.	•	•	•	•
BCA WATSON RICE LLP	•	•	•	•
BEACON SYSTEMS, INC.	•	•	•	•
BERRY, DUNN, MCNEIL & PARKER LLC				
CAMBRIA SOLUTIONS, INC.	•	•	•	•
CARR, RIGGS & INGRAM, LLC	•	•	•	•
CDR MAGUIRE INC.	•		•	•
CIVIC INITIATIVES, LLC		•	•	•
COHNREZNICK LLP	•	•	•	•
COST MANAGEMENT INC.		•	•	
CROWE LLP	•	•	•	•
CSG GOVERNMENT SOLUTIONS, INC.	•	•	•	•
CSRS, INC.	•	•	•	•
DELOITTE CONSULTING LLP	•	•	•	•
DIGITAL INTELLIGENCE SYSTEMS, LLC			•	•
ERNST & YOUNG U.S. LLP	•	•	•	
FCMC LLC	•	•	•	•
FEDERAL ENGINEERING, INC.	•	•	•	•
FIRST DATA GOVERNMENT SOLUTIONS, LP	•	•		
GARTNER, INC.	•	•	•	•
GENESIS CONSULTING PARTNERS, LLC	•	•	•	
GRANT THORNTON PUBLIC SECTOR LLC	•	•	•	•
GOVERNMENT SERVICES GROUP, INC.				
HAGERTY CONSULTING SERVICES, INC.				
HEALTH MANAGEMENT ASSOCIATES, INC.		•	•	•
ICF INCORPORATED, L.L.C.				
INFORMATION SYSTEMS CONSULTANTS, INC.			•	
INNOVATIVE EMERGENCY MANAGEMENT, INC.	•	•	•	•
ISF, INC.	•	•	•	•
KPMG LLP	•	•	•	•
MAXIMUS CONSULTING SERVICES, INC.	•	•	•	•
MERIDIAN PARTNERS, LLC				
MGT OF AMERICA CONSULTING, LLC	•		•	•
MORGANFRANKLIN CONSULTING, LLC	•	•		
NTT DATA STATE HEALTH CONSULTING, LLC			•	
PROCOM CONSULTING, INC.	•	•	•	•
PUBLIC CONSULTING GROUP LLC	•	•	•	•
RSM US LLP			•	
SLALOM, LLC				
STRATEGIC IT ALIGNMENT GROUP, LLC			•	•
TEKSYSTEMS GLOBAL SERVICES, LLC	•	•	•	•
TELAFORCE, LLC				
THE BALMORAL GROUP, LLC	•	•	•	•
THE NORTH HIGHLAND COMPANY LLC	•	•	•	•
THOMAS HOWELL FERGUSON P.A.	•	•	•	•
TIDAL BASIN GOVERNMENT CONSULTING, LLC				
TRANSPRO CONSULTING, LLC	•		•	•
WALTER R. MCDONALD & ASSOCIATES, INC.	•	•	•	•
WHEELER EMERGENCY MANAGEMENT CONSULTING				

**Management Consulting Services (80101500-20-1)
Contractors by Service**

Contractor	e) Executive/ Management Coaching Services	f) Customized Training as needed to achieve a Management Consulting Objective	g) Assistance with Policy and Regulation Development	h) Assistance with Process and Productivity Improvement
22ND CENTURY TECHNOLOGIES, INC.	•	•	•	•
AAJ COMPUTER SERVICES, INC. dba OZ				•
ACCENTURE LLP		•		•
ADVANCED SYSTEMS DESIGN, INC.	•	•	•	•
ALVAREZ & MARSAL HOLDINGS, LLC	•			
ARCADIS U.S., INC.	•	•	•	•
ATKINS NORTH AMERICA, INC.	•		•	•
BCA WATSON RICE LLP	•	•		•
BEACON SYSTEMS, INC.	•	•	•	•
BERRY, DUNN, MCNEIL & PARKER LLC		•		•
CAMBRIA SOLUTIONS, INC.	•	•	•	•
CARR, RIGGS & INGRAM, LLC	•	•	•	•
CDR MAGUIRE INC.	•	•	•	•
CIVIC INITIATIVES, LLC		•		•
COHNREZNICK LLP		•	•	•
COST MANAGEMENT INC.				•
CROWE LLP	•	•	•	•
CSG GOVERNMENT SOLUTIONS, INC.	•	•	•	•
CSRS, INC.		•	•	•
DELOITTE CONSULTING LLP	•	•	•	•
DIGITAL INTELLIGENCE SYSTEMS, LLC				
ERNST & YOUNG U.S. LLP	•	•	•	•
FCCM LLC			•	•
FEDERAL ENGINEERING, INC.	•	•	•	•
FIRST DATA GOVERNMENT SOLUTIONS, LP				
GARTNER, INC.				•
GENESIS CONSULTING PARTNERS, LLC	•	•		•
GRANT THORNTON PUBLIC SECTOR LLC	•	•	•	•
GOVERNMENT SERVICES GROUP, INC.				
HAGERTY CONSULTING SERVICES, INC.				
HEALTH MANAGEMENT ASSOCIATES, INC.	•	•	•	•
ICF INCORPORATED, L.L.C.	•			•
INFORMATION SYSTEMS CONSULTANTS, INC.				
INNOVATIVE EMERGENCY MANAGEMENT, INC.	•	•		•
ISF, INC.	•	•	•	•
KPMG LLP	•	•	•	•
MAXIMUS CONSULTING SERVICES, INC.	•	•	•	•
MERIDIAN PARTNERS, LLC	•	•		•
MGT OF AMERICA CONSULTING, LLC		•		•
MORGANFRANKLIN CONSULTING, LLC	•	•		•
NTT DATA STATE HEALTH CONSULTING, LLC	•	•		•
PROCOM CONSULTING, INC.		•		•
PUBLIC CONSULTING GROUP LLC	•	•	•	•
RSM US LLP				•
SLALOM, LLC	•			
STRATEGIC IT ALIGNMENT GROUP, LLC				•
TEKSYSTEMS GLOBAL SERVICES, LLC	•	•		
TELAFORCE, LLC		•		•
THE BALMORAL GROUP, LLC			•	•
THE NORTH HIGHLAND COMPANY LLC	•	•	•	•
THOMAS HOWELL FERGUSON P.A.	•	•	•	•
TIDAL BASIN GOVERNMENT CONSULTING, LLC				
TRANSPRO CONSULTING, LLC	•	•		•
WALTER R. MCDONALD & ASSOCIATES, INC.			•	•
WHEELER EMERGENCY MANAGEMENT CONSULTING		•		

**Management Consulting Services (80101500-20-1)
Contractors by Service**

Contractor	i) Expert Witness Services in Support of Litigation, Claims, or Other Formal Cases Relating to Management Consulting	j) Advisory and Assistance Services Relating to a Customer's Mission-Oriented Business Programs or Initiatives	k) Systems Alignment and Consolidation	l) Comprehensive Grants Management Services Related to the Stafford Act and other related State and Federal Grant Programs
22ND CENTURY TECHNOLOGIES, INC.	•	•	•	
AAJ COMPUTER SERVICES, INC. dba OZ		•	•	
ACCENTURE LLP		•	•	•
ADVANCED SYSTEMS DESIGN, INC.		•	•	•
ALVAREZ & MARSAL HOLDINGS, LLC		•		
ARCADIS U.S., INC.	•	•	•	•
ATKINS NORTH AMERICA, INC.	•	•	•	•
BCA WATSON RICE LLP	•	•	•	
BEACON SYSTEMS, INC.	•	•	•	•
BERRY, DUNN, MCNEIL & PARKER LLC				
CAMBRIA SOLUTIONS, INC.		•	•	
CARR, RIGGS & INGRAM, LLC	•	•	•	•
CDR MAGUIRE INC.		•	•	•
CIVIC INITIATIVES, LLC		•		
COHNREZNICK LLP		•	•	•
COST MANAGEMENT INC.			•	
CROWE LLP	•	•	•	•
CSG GOVERNMENT SOLUTIONS, INC.		•	•	
CSRS, INC.		•	•	•
DELOITTE CONSULTING LLP		•	•	•
DIGITAL INTELLIGENCE SYSTEMS, LLC				
ERNST & YOUNG U.S. LLP		•	•	•
FCCM LLC		•	•	•
FEDERAL ENGINEERING, INC.	•	•	•	•
FIRST DATA GOVERNMENT SOLUTIONS, LP				
GARTNER, INC.		•	•	
GENESIS CONSULTING PARTNERS, LLC		•		
GRANT THORNTON PUBLIC SECTOR LLC	•	•	•	•
GOVERNMENT SERVICES GROUP, INC.				•
HAGERTY CONSULTING SERVICES, INC.				•
HEALTH MANAGEMENT ASSOCIATES, INC.	•	•	•	
ICF INCORPORATED, L.L.C.				
INFORMATION SYSTEMS CONSULTANTS, INC.				
INNOVATIVE EMERGENCY MANAGEMENT, INC.		•	•	•
ISF, INC.	•	•	•	•
KPMG LLP	•	•	•	•
MAXIMUS CONSULTING SERVICES, INC.	•	•	•	•
MERIDIAN PARTNERS, LLC		•		
MGT OF AMERICA CONSULTING, LLC		•	•	
MORGANFRANKLIN CONSULTING, LLC		•	•	•
NTT DATA STATE HEALTH CONSULTING, LLC		•	•	
PROCOM CONSULTING, INC.	•	•	•	
PUBLIC CONSULTING GROUP LLC		•	•	•
RSM US LLP	•	•		•
SLALOM, LLC				•
STRATEGIC IT ALIGNMENT GROUP, LLC				
TEKSYSTEMS GLOBAL SERVICES, LLC			•	
TELAFORCE, LLC			•	
THE BALMORAL GROUP, LLC		•		•
THE NORTH HIGHLAND COMPANY LLC	•	•	•	•
THOMAS HOWELL FERGUSON P.A.	•	•	•	•
TIDAL BASIN GOVERNMENT CONSULTING, LLC				•
TRANSPRO CONSULTING, LLC			•	
WALTER R. MCDONALD & ASSOCIATES, INC.		•	•	
WHEELER EMERGENCY MANAGEMENT CONSULTING				•



How to Use This Contract

Management Consulting Services (80101500-20-1)

Contractor information, pricing, and contract documents are located on the contract webpage at https://www.dms.myflorida.com/business_operations/state_purchasing/state_contracts_and_agreements/state_term_contracts/management_consulting_services2.

State Agencies

- [An RFQ for services or IT commodities must be issued to at least 25 vendors on the contract \(or all vendors, if less than 25\)...](#) Please note that some contractors are **not** contracted to provide all of the 12 services that are available under this contract; an RFQ should not be issued to any contractor that does not offer the service requested in the RFQ. Please refer to "Contractors by Service" in the *Contract Information* section of the contract webpage to view the service(s) that each contractor is contracted to provide.
- The State of Florida's online procurement system, MyFloridaMarketPlace (MFMP), is the preferred method for placing orders and making payments for this contract:
 - Create an electronic quote (eQuote) in [MFMP Sourcing](#); for additional information, visit https://www.dms.myflorida.com/business_operations/state_purchasing/myfloridamarketplace/mfmp_agency_customers/mfmp_university/electronic_quotes_equotes. **For your convenience, the Division of State Purchasing has developed an eQuote template specifically for this contract; when creating an eQuote for this contract:**
 - Refer to the [eQuote Templates for State Term Contracts Job Aid](#).
 - Select the contract number shown above in the 'Contract Number' field.
 - Select **No** for 'Notify Vendors?' to ensure that only contracted vendors, which are added and/or confirmed by the customer, will be notified.
 - Select the **Management Consulting eQuote Master Template**.
 - Select at least one contracted vendor for the event; do not add 'Public User'.
 - In addition to the vendor(s) selected by the customer to participate in the eQuote, up to 25 randomly-selected vendors will be added for the service selected; the customer should confirm that all vendors (whether manually or automatically added) are contracted for the specific service requested.
 - The specific format of the RFQ is left to the discretion of the agency; the template provides a standard format with fields for scope of work attachments, contact information, vendor certification, and service selection.

- The eQuote/RFQ must specify a term and include a customer statement of work (SOW) that states the services, service levels, educational qualifications, and experience needed. State agencies should consider including the following information in the eQuote/RFQ:
 - Statement of purpose;
 - Customer project job duties;
 - Required tasks and deliverables, completion of which is subject to customer acceptance;
 - Requirement for contractor to provide an estimate of the number of hours needed to complete the projects or deliverables, as described in the customer SOW;
 - Customer project timeline;
 - List of contractor responsibilities;
 - Necessary qualifications/certifications of the individuals/organization performing work on the customer project;
 - Customer-specific financial consequences for non-performance; and
 - Customer-specific terms and conditions.
 - Create a requisition/purchase order in [MFMP Buyer](#); for additional information, visit https://www.dms.myflorida.com/business_operations/state_purchasing/myfloridamarketplace/mfmp_agency_customers/mfmp_university/requisitions_purchase_orders.
 - **CATALOG TYPE:** None - Create a requisition and click the 'Create Non-Catalog Item' button. In the 'Supplier' field, use the appropriate contractor's FEIN, as provided on the contract webpage; in the 'State Contract ID' field, select the contract number shown above from the drop-down menu.
 - **COMMODITY CODE:** Select the most appropriate eight-digit commodity code under 80101500 or 80101600; the current list of commodity codes activated in MFMP is located at https://www.dms.myflorida.com/business_operations/state_purchasing/myfloridamarketplace/commodity_codes.
 - **METHOD OF PROCUREMENT:** B - State term contract with RFQ
- Please use the appropriate contractor's FEIN, as provided on the contract webpage, when making payments in the Florida Accounting Information Resource (FLAIR); also, please use the appropriate contractor's FEIN when recording purchasing card (PCard) payments in FLAIR.

Eligible Users

- Eligible users, as defined by [Rule 60A-1.001, Florida Administrative Code](#), must create an RFQ to place an order using this contract. **Eligible users must send the RFQ electronically via email to at least eight (8) contractors; the selected contractors must be contracted to provide the service(s) requested.** Contractor contact information is accessible from the contract webpage. The RFQ must specify a term and include a customer SOW that states the services, service levels, educational qualifications, and experience needed. Eligible users should consider including the information listed in the "State Agencies" section above in the RFQ.

Frequently Asked Questions

- Can I purchase from a vendor outside of this contract if they offer better pricing?
 - In accordance with section 287.056, Florida Statutes, state agencies are required to purchase commodities and contractual services from state term contracts procured by the Department of Management Services.
- What should I do if I have an issue with the contractor?
 - If you are unable to resolve an issue with a contractor, you may contact the contract manager listed on the contract webpages to explore additional options. These options include: complete a vendor performance survey online to document the issue, work with the contract manager to elevate the issue with the contractor representatives, or submit a vendor complaint that requires a formal response from the contractor.

Contact Information

- If you have any questions or require assistance specific to this contract (e.g. pricing, contract requirements, etc.), please contact the contract manager listed on the contract webpage.
- If you have any questions or require assistance specific to MFMP (e.g. system access, purchase orders, catalogs, etc.), please visit the Division of State Purchasing's MFMP webpage located at https://www.dms.myflorida.com/business_operations/state_purchasing/myfloridamarketplace.

[Skip to Main Content](#)

Department of Management Services

[Florida Department of Management Services](#) > [Business Operations](#) > [State Purchasing](#) > [State Contracts and Agreements](#) > [State Term Contracts](#) > [Management Consulting Services](#) > Contractors

Management Consulting Services80101500-20-1

Contractors

Contractor List

Name	CBE Code	Florida Climate Friendly Preferred Products	Recycled Products	Utilizes Authorized Resellers	Coverage Area
<u>22ND CENTURY TECHNOLOGIES, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>AAJ COMPUTER SERVICES, INC. dba OZ</u>	A - Non-Minority	No	No	No	Statewide
<u>ACCENTURE LLP</u>	A - Non-Minority	No	No	No	Statewide
<u>ADVANCED SYSTEMS DESIGN, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>ALVAREZ & MARSAL HOLDINGS, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>ARCADIS U.S., INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>ATKINS NORTH AMERICA, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>BCA WATSON RICE LLP</u>	H - African-American, Certified	No	No	No	Statewide
<u>BEACON SYSTEMS, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>BERRY, DUNN, MCNEIL & PARKER LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>CAMBRIA SOLUTIONS, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>CARR, RIGGS & INGRAM, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>CDR MAGUIRE INC.</u>	A - Non-Minority	No	No	Yes	Statewide
<u>CIVIC INITIATIVES, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>COHNREZNICK LLP</u>	A - Non-Minority	No	No	Yes	Statewide
<u>COST MANAGEMENT INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>CROWE LLP</u>	A - Non-Minority	No	No	No	Statewide
<u>CSG GOVERNMENT SOLUTIONS, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>CSRS, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>DELOITTE CONSULTING LLP</u>	A - Non-Minority	No	No	No	Statewide
<u>DIGITAL INTELLIGENCE SYSTEMS, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>ERNST & YOUNG U.S. LLP</u>	A - Non-Minority	No	No	No	Statewide
<u>FCMC LLC</u>	A - Non-Minority	No	No	Yes	Statewide
<u>FEDERAL ENGINEERING, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>FIRST DATA GOVERNMENT SOLUTIONS, LP</u>	A - Non-Minority	No	No	No	Statewide
<u>GARTNER, INC.</u>	A - Non-Minority	No	No	No	Statewide

Name	CBE Code	Florida Climate Friendly Preferred Products	Recycled Products	Utilizes Authorized Resellers	Coverage Area
<u>GENESIS CONSULTING PARTNERS, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>GOVERNMENT SERVICES GROUP, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>GRANT THORNTON PUBLIC SECTOR LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>HAGERTY CONSULTING SERVICES, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>HEALTH MANAGEMENT ASSOCIATES, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>ICF INCORPORATED, L.L.C.</u>	A - Non-Minority	No	No	No	Statewide
<u>INFORMATION SYSTEMS CONSULTANTS, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>INNOVATIVE EMERGENCY MANAGEMENT, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>ISF, INC.</u>	I - Hispanic, Certified	No	No	No	Statewide
<u>KPMG LLP</u>	A - Non-Minority	No	No	Yes	Statewide
<u>MAXIMUS CONSULTING SERVICES, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>MERIDIAN PARTNERS, LLC</u>	I - Hispanic, Certified	No	No	No	Statewide
<u>MGT OF AMERICA CONSULTING, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>MORGANFRANKLIN CONSULTING, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>NTT DATA STATE HEALTH CONSULTING, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>PROCOM CONSULTING, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>PUBLIC CONSULTING GROUP LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>RSM US LLP</u>	A - Non-Minority	No	No	No	Statewide
<u>SLALOM, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>STRATEGIC IT ALIGNMENT GROUP, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>TEKSYSTEMS GLOBAL SERVICES, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>TELAFORCE, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>THE BALMORAL GROUP, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>THE NORTH HIGHLAND COMPANY LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>THOMAS HOWELL FERGUSON P.A.</u>	A - Non-Minority	No	No	Yes	Statewide
<u>TIDAL BASIN GOVERNMENT CONSULTING, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>TRANSPRO CONSULTING, LLC</u>	A - Non-Minority	No	No	No	Statewide
<u>WALTER R. MCDONALD & ASSOCIATES, INC.</u>	A - Non-Minority	No	No	No	Statewide
<u>WHEELER EMERGENCY MANAGEMENT CONSULTING, LLC</u>	A - Non-Minority	No	No	No	Statewide

TO: Mayor Robert Howell and Council
FROM: Peter Cavalli, Town Manager
DATE: June 3, 2022
RE: Administrative Assistant | Resumes

DISCUSSION

To assist in providing administrative staff to the Town of Kenneth City's Town Hall, management has collected a number of resumes for the Town Council to review in their efforts to provide coverage for the Town Hall.

Staff has attached the current Administrative Assistant Job Description and 10 resumes that were collected. Several of these applicants seem to be potential employees for the Town of Kenneth City.

Several of the applicants have been interviewed by Town Hall Staff.

FINANCIAL IMPACT

The requested hourly wages for these non-exempt positions range between \$15.00 and \$18.00 (plus benefits). This salary has been provided for in the current budget (FY 2022-23).

CONCLUSION

Staff respectfully requests direction, if any, to proceed with the selection and hiring of one of the applicants discussed above.

Administrative Assistant

Job Title: Administrative Assistant
Department: Town Hall
Reports to: Town Clerk
Classification: Full time; Non-Exempt (40 Hours per week)
Compensation: \$14 to \$18.65 hourly

Summary:

The Administrative Assistant supports the Town Manager, Town Clerk and other Town support staff, and serves as the first point of contact for all visitors to Town Hall, and the Town Building Departments. This is a full-time Position – 40-Hours Per-Week (Non-Exempt).

Responsibilities:

Under the direction of the Town Manager and the Town Clerk, the person in this position performs varied administrative office duties of a complex nature. The incumbent is expected to exercise independent judgment, and to make decisions regarding non-routine questions and work methods. The position requires exceptional customer service, including strong interpersonal and written communication aptitudes. Additional capabilities of the incumbent include the ability to type, proficiency in and knowledge of entering and maintaining information into databases, updating files, processing forms, researching information, managing records, scheduling appointments, providing information to callers and/or walk-in citizens and maintaining knowledge of the organization's policy and procedures.

Work is reviewed through observation, review of work products, and results obtained. Tasks include public contact, purchasing, office management, bookkeeping and assisting in the management of public records.

Essential Functions:

- Provide advanced level of comprehensive administrative support, responding to public inquiries, screening calls and acting as a liaison between citizens, staff, and supervisors, while exercising independent judgment and decisions.
- Reconciles and prepares daily cash deposits.
- Answer telephones and give information to callers, take messages, or transfer calls to appropriate individuals; assists callers with information, as needed.
- Review and verify source materials to determine accuracy and completeness of information; follow up to correct or complete data of any and all database entries.
- Input information into databases, including records maintenance.
- Coordinate, manage, or maintain filing systems and recording of information.

- May compose documentation, notes, or reports, and assist with special projects as directed by Town Manager or Town Clerk.
- Assists Town Manager and Town Clerk in managing Town social media pages and Town Website and assists in the preparation of a bimonthly newsletter through Constant Contact and other social media platforms.
- Assists Town Clerk in compilation of materials associated with regular Town Council meetings, special projects, business tax receipting, accounts payable, and other front counter permitting needs.
- May greet visitors or employees and address their inquiries or direct them to the appropriate individuals according to their needs.
- May schedule or confirm appointments or meetings; may maintain complex scheduling and/or event calendars and determine best course of action when conflicts occur.
- Operate office equipment, fax machines, scanners, copiers, and may arrange for repairs when equipment malfunctions.
- May conduct research, collecting information on non-technical, operational, or administrative issues and prepare summary of research findings.
- Enter, update, process, and maintain records, files, applications, and/or forms.
- May monitor various supply inventories and initiate purchase of office inventory and supplies.
- May assist with processing timekeeping, attendance, overtime, and time-off requests for department submission to payroll *in absence* of either the Town Clerk or Town Manager, as needed.
- May make travel arrangements for the Town Manager or Town Clerk.

This list is not intended to be all-inclusive, and you may not be responsible for every item listed, or other similar items or tasks indicative of other municipal government administrative assistant positions. Preferred candidates will be those that are highly adaptable, people-oriented with a genuine interest in public service and administration. Additional aptitudes include learning accounts payable, business tax receipting (BTR), along with land-use, zoning, economic development, permitting, or other related functions, as needed.

Supervision:

Supervision Received: Day-to-day work is performed under the administrative direction and support of the Town Clerk and in accordance with all state and local laws and regulations.

Supervision Given: May be assigned supervisory responsibility for Town volunteers, or other technical contractors, as needed.

Job Environment:

Administrative work is performed under typical office conditions. Special events work may involve working outdoors, and under varying conditions requiring exposure to weather or other non-standard, indoor conditions. The noise level is moderate at times. Employee may be required to attend evening meetings, and/or work during weekends and holidays, as needed. Employee will be eligible for equivalent time off for work outside of his/her typical work schedule.

Recommended Minimum Qualifications:

A Bachelor's degree in a liberal arts curriculum, public administration, finance or other related field, along with 1 year of experience working, interning, or volunteering within a local government office setting is preferred.

A two-year, Associates Degree, or equivalent, and supplemented by 2 or more years of prior career experience of working in a municipal government office, or philanthropic-related setting may be considered in lieu of a four-year degree.

Any equivalent combination of education, background and experience may be considered as a basis of qualification for the position. The importance of being a "good fit" in a small office setting will influence consideration for this position.

Must possess a valid Florida driver's license.

Knowledge, Ability and Skills:

Knowledge of business English, spelling and arithmetic.

Knowledge of general office practices and procedures.

Ability to operate standard office equipment such as computers and copiers.

Ability to maintain accurate records, logs, and files.

Ability to perform essential functions with frequent interruption and/or distraction.

Ability to prioritize assignments.

Ability to work independently and follow through on assignments with minimal direction.

Ability to act when answers to a problem are not readily apparent.

Ability to perform all functions of the job classification without posing a direct threat to the health or safety of other individuals in the workplace.

Ability to independently perform analysis, prepare reports, and formulate recommendations.

Ability to deal with the public in a courteous and tactful manner.

Aptitude for an attention to detail and accuracy.

Ability to work on a variety of unrelated tasks at the same time.

Ability to work effectively under time constraints to meet deadlines.

Time management skills and excellent inter-personal skills.

Verbal and written communication skills.

Accurate typing skills.

Specialized skills in using a variety of computer software systems, social media applications, and smartphone/camera.
Consensus building skills.
Advanced Publisher, Word, and Excel skills.

Physical and Mental Requirements

Ability to speak, hear and comprehend conversation spoken in English.

Ability to sit for long periods of time, not to exceed two (2) hours consecutively.

Ability to see, read, and comprehend writing and computer printouts in English.

Ability to print or write cursive letters, numbers, and words legibly in English.

Ability to lift and carry materials not to exceed 20 lbs.

Ability to stand for periods of time not to exceed 30 minutes at one time.

Ability to stoop, kneel and reach overhead for books or paper.

Ability to control behavior when encountering stressful situations, such as in dealing with the uncooperative public, peers, oral presentations, or when encountering necessary deadlines.

Ability and confidence of making decisions to enable a project to move forward, without waiting on immediate feedback when important deadlines are at risk of being met.

This job description is not intended to be and should not be construed as an all-inclusive list of the responsibilities, skills or working conditions associated with the position. While it is intended to accurately reflect the position activities and requirements, management reserves the right to modify, add or remove duties and assign other duties as necessary. This job description does not constitute a written or implied contract for employment.

The Town of Kenneth City is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the employer will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

Jacquelyn Birnkrant

jackiebirnkrant32@gmail.com

(732)233-9060

Summary:

To obtain an entry level position as an Administrative Assistant.

Skills:

Time Management 40-65wpm	Willing to Learn/Quick Learner	Typing
Attention to Detail	Clerical Skills	
Written/Verbal Communication		
Time Management	Organize	Patient
Team Player	Independent	Critical
Thinking		
Proficient Microsoft Words	Multi-Task	Great
Customer Service Skills		
Problem Solving	Professional	

Experience:***Entry-Level Administrative Assistant/Receptionist/Data Entry Clerk***

Freehold Skin Clinic-Freehold, New Jersey

November 1998-to November 2010

- *Greeted walk in client and educated them on current health program.
- *Answering incoming phone calls on multiple-switch button phone.
- *Scheduling appointments, meetings, jotting down messages, and memos.
- *Pulling filing charts out of the filing cabinet and filing charts back into the filing cabinet.
- *Sending and receiving correspondence.
- *Data Entry on Excel.
- *General office work.
- *Transferring office work on the computer.

De La Fontaine Trilingual Montessori School

Saint Petersburg, Florida* Preschool Teacher

May 9, 2022-May19,2022

- Building a secure relationship with the children.
- Promote Cognitive development, Language development, social, math, science, physical development.
- Supervise and Interact with the infant and preschool student on the playground.
- Promote physical development outside in the playground.
- Working closely with the parents and ensuring close communication with parents throughout the day.
- Patient, nurturing, and thoughtful.
- Maintain discretion around children record.

Operation Par/COSA Development and Family Guidance Center

Saint Petersburg, FL*Preschool Teacher

11/2018-07/2021

Promote language development skills, reading, storytelling, and art and craft.

Snack and nap time.

Promote physical development outside in the playground.

Kept the classroom clean and sterilized and disinfected the toys and surface.

Communicate regularly with parents about supplies, behavior, and development activities.

Fill out parents' detail daily report outline child day, feeding, and changing diapers.

Create a lesson plan for each student on the students' language development, social, cognitive, math, science, and physical development on teacher strategies.

Document the preschool students' development strategies.

Supervise and interact with the preschool students on the playground.

Art Portfolio of the infant art.

R'Club

Traveling Substitute and Teacher Assistant,

Saint Petersburg, Florida*Preschool traveling substitute Teacher and Teacher Assistant

03/2014-06/2018

Help lead teacher plan and write the lesson plans for preschool students

Help lead circle time by singing songs, reading a book, calendar-day, month, and year, counting 1-60.

Help the lead teacher with lunch and snacks.

Help supervise and interact with preschool students in the classroom and playground.

Help with children on their cot for nap time and put on nap time music.

Help children with their craft and projects.

Education:

Rumson Fair Haven Regional College 1994-1998

Diploma

Georgian Court University 2000-2004

College Diploma

Computer skills for the Workplace January 12, 2022-March 2022

Certificate

Kristina Campbell

Saint Petersburg, FL 33701

kristinacampbell847_6cd@indeedemail.com

+1 727 871 5059

I have my BA in Public Safety Administration and Criminal Justice. I am working towards my master's degree in Criminology. I have my A.S in Early Childhood Education along with my National CDA in both birth to 36 months and Preschool Age. I also have my Staff Credential; I would love the opportunity to work with your company and be a valuable employee for you.

Authorized to work in the US for any employer

Work Experience

Legal Assistant

Ayo and Iken - Saint Petersburg, FL

April 2021 to Present

Case Manager

Lutheran Services Florida - Largo, FL

May 2020 to May 2021

Case Manager for Drug Court and Baby Court

Works cooperatively with Program Directors, with other Case Managers, with placement staff, with Protective Investigators, with Child Welfare Legal staff and with agency support staff.

Effectively manages time to ensure that all home visits are completed as required, all documentation is entered into FSFN within 48 hours, court documentation is prepared according to specified time frames and court appearances are attended as necessary.

Follows Florida Statutes, Administrative Code, written policies and orders of the Dependency Court in managing cases toward goals recorded in case plans.

Teacher

Cathedral School of St Jude's - Saint Petersburg, FL

August 2017 to July 2020

Worked with class of two/three years old. Helped with potty training and strengthening their motor skills.

Teacher

Bayfront Child Development - Saint Petersburg, FL

August 2014 to July 2017

Preschool room and I have fifteen children in my class. I am responsible for weekly schedules monthly assessments and observations. My center just when through NAEYC's and we passed.

Private Nanny

Saint Pete Beach, FL

August 2016 to March 2017

I work with a set of three-year-old twins. I help with potty training and strengthening their motor skills. Plan monthly schedule based on the child's developmental needs

Teacher

Richmond Hill Montessori - Richmond Hill, GA
August 2012 to March 2014

Worked with class of two/three years old. Helped with potty training and strengthening their motor skills. Planned monthly schedule based on NAEYC's requirement. Attended NAEYC training classes

Response Media Inc - Clearwater, FL
2010 to 2012

33762

Administrative Assistant

Response Media Inc
January 2000 to January 2008

Started working at Response as a proofreader part time. In 2002 became full time Receptionist. Answered calls, assisted customers. Bank runs computer input. Faxed, data entry, collections

Education

BA in Public Safety Administration and Criminal Justice

Saint Petersburg College
July 2019

Skills

- Case Management
- Childcare
- Nannying
- Toddler Care
- Classroom Management
- Legal Research

Certifications and Licenses

Teaching Certification

Kristin L. Cook
480 Helen St. Dunedin, FL 34698
(305) 942-3799 cochisetrinityknot@yahoo.com

Objective

Seeking a responsible and challenging position in a growth oriented progressive institution where my experience and skills will significantly contribute to the overall success of the organization and provide opportunities for my career growth.

Education

The Ohio State University: Attended three years. Completed core coursework for bachelor's degree in Arts and Sciences

Experience

City of Holmes Beach
Deputy City Clerk

Holmes Beach, FL 05/21-10/21

Direct support to the City Clerk. Functions as City Clerk in her absence. Administrative office support. Prepares City Commission agendas and agenda packets. Attends Commission meetings and acts as Clerk in her absence. Responsible for Planning Commission agendas and meetings, as well as Special Magistrate hearings. Responsible for meeting minutes. Greet and direct visitors to City Hall. Maintain government calendar, order supplies, responsible for General Government invoices, open and distribute mail, process payments by phone, and in person, for Police and Code Enforcement fines.

City of Dunedin

Senior Administrative Assistant

Dunedin, FL 7/2019-05/21

Administrative assistant to the City Clerk. Performs administrative and support functions to the City Clerk. Schedules appointments, maintains Clerk's calendar as well as City Hall calendar. Responsible for maintaining Clerk's portion of City website. Maintains rosters and agendas and ZOOM meetings for 30 Boards and Committees. Proofreading and editing of City Commission minutes. Attends commission meetings. Maintains Clerks budget, processes invoices, orders supplies. Respond to inquiries for public record requests. Provides coverage at City Hall when needed.

Pinellas County Tax Collector

Customer Service Specialist

Largo, FL 11/2018-07/2019

Greets and assists customers at the front desk. Responds to inquiries from the public.

Monroe County Clerk of Court

Deputy Clerk

Key West, FL 12/2013 to 05/2018

Various clerical duties within the Clerk of Courts office. Administrative Assistant to Finance Director. Receptionist duties: answering phones and directing calls, copying, scanning, faxing, sorting and distributing mail, data entry, composing correspondence, maintaining files and logs. Payroll duties as assigned. Prepared bank deposits. Special projects as assigned by Finance Director and Clerk of Court. Felony/Misdemeanor court clerk. Prepared files for court, acted as second chair clerk during proceedings. Maintained dockets, scanned court documents, answered phone calls and emails regarding court. Assigned cases. Prepared cases State Attorney's. Responded to requests for information from public, as well as State/Local/Federal Agencies. Prepared appeals for higher courts.

Department of Defense

Secretary

Key West, FL 8/2011-2/2012

Served as initial point of contact for Commissary. Supported recruiting process by scheduling interviews, initiating background checks. Prepared employee schedules and completed weekly payroll duties. Bookkeeping and records management. Prepared orientation packages for new hires. Assisted with completion of materials. Assisted employees with training. Maintained schedules and employee files. Responded to requests for information from public as well as employees. Maintained website.

LabCorp

Specimen Accessioner

Dublin, OH July 2013 to 9/2013

Prepared laboratory specimens for designated departments/locations prior to laboratory analysis and testing. Unpacked specimens from branches or ports and routes specimens by type to various staging areas. Prepares all specimens received for testing in designated laboratory departments or locations such as staging of specimens, centrifuge, separate serum, and blood smears. Aliquots sample for departments. Prepared excess specimen samples for storage and resolves and documents problem specimens.

The Ohio State University Department of Anatomic Pathology

Clinical Lab Technician

Columbus, OH 9/2004 -2/2011

Handled multifaceted tasks: data entry, filing, records management and billing as the technician to the gross room pathology assistants. Obtained specimens from outside the department as well as from inside the hospitals. Accessioned, and fixed specimens. Maintained a high level of attention to detail while performing tasks. Communicated effectively with multiple departments to established strong relationships to gain support and effectively achieve results. Provided timely, courteous and knowledgeable response to information requests; screened and transferred calls; and prepared reports. Earned excellent marks on performance reviews, with citations for excellence in areas including work volume, accuracy and quality; ability to learn and master new concepts; positive work ethic; and commitment to providing unsurpassed service. Ability to deal with the public, customer service, data entry, administrative skills, organizational skills, time management.

CHRISTOPHER W. ELSEN
1174 ½ Bass Boulevard
Dunedin, Florida 34698
(727) 698-0771 chriselsen2001@gmail.com

SUMMARY

Account Management/Financial Services Professional with extensive background in sales, customer service and team leadership. A resourceful manager educated in multiple disciplines, resulting in a creative and balanced approach to customer/client satisfaction. More than 12 years proven experience in the Relationship Management/Business Development market segments.

PROFESSIONAL EXPERIENCE

Global Media & Rewards LLC Clearwater, FL Contact Center Manager 2018-Present

Contact Center Operations Manager: Responsible for development, review and supervision of complete Contact Center staff. Position requires the ability to direct effective information flow and communication regarding the orientation of each team member for Call Center operations.

- Manage team of 15-21 through successful comprehensive sales techniques regarding Guardian Link Personal Emergency Response System.
- Analyze operating/financial/staff performance, exceeding monthly sales goals by 28-34%.

Hancock Whitney Bank St Petersburg, FL Financial Services Specialist II 2017-2018

Business/Commercial Personal Banker: Responsible for promoting and managing Consumer/Business Line of Credit and Loan accounts. Position required the ability to maintain a customer service culture while expediting loan closing policies and procedures.

- Ensured compliance with internal controls, operational procedures and risk management policies and protocols.
- Exceeded deposit and loan Corporate/Branch goals by 35-42% for 4 consecutive quarters.

Global Media & Rewards LLC Clearwater, FL Contact Center Manager 2016-2017

Contact Center Operations Manager: Responsible for development, review and supervision of complete Contact Center staff. Position required the ability to direct effective information flow and communication regarding the orientation of each team member for Call Center operations.

- Managed team of 20-25 through successful comprehensive sales techniques regarding Guardian Link Personal Emergency Response System.
- Analyzed operating/financial/staff performance, exceeding monthly sales goals by 27-32%.

SunTrust Banks, Inc. Clearwater Beach, FL Personal Banker III 2015-2016

Business/Commercial Personal Banker: Responsible for consistently engaging in consultative client conversations to offer personalized recommendations to ensure each customer attained their financial goals. Position required the ability to satisfy 100% of each client's sales and service opportunities.

- Utilized each client interaction to prospect and set appointments through outbound calling/personal visits partnering with business development and financial advisors.
- Exceeded client/partner expectations and commercial/credit sales goals.

Wells Fargo Bank, N.A. Largo, FL Personal Banker 2013-2015

Business/Commercial Personal Banker: Responsible for managing customer portfolios and providing broad base of financial and credit services. Position required the ability to maintain relationships with Wells Fargo partners and customers to maximize sales opportunities.

- Exceeded commercial and credit sales revenue goals by 19-32% for 8 consecutive quarters.
- Identified cross sell opportunities for customer/client financial products and services.

Knology Inc./WOW LLC Pinellas Park, FL Business Account Executive 2012-2013

Pinellas County Business Account Executive: Responsible for prospecting, growing and maintaining a Commercial account base of Enterprise and small business customers. Position required the ability to sell data, internet, voice and video products/applications in a highly competitive environment.

- Represented exceptional networking, relationship building and consultative sales skills resulting in an overachievement of monthly company sales quotas by 16-25%.
- Established, developed, retained and supported relationships with vendors, Chamber of Commerce and community institutions to create referral opportunities.

United Parcel Service, Inc. Clearwater, FL Account Executive 2008-2011

Florida District Account Executive: Responsible for managing the relationship and sales process of UPS Territory Accounts. Position required the ability to focus on customer concerns, develop solutions, provide efficient follow-up and coordinate contract/technology implementations.

- Demonstrated expert knowledge of UPS product portfolios, customer technology solutions and business unit operations, exceeding weekly/monthly/quarterly UPS corporate sales goals by 18-29% for 14 consecutive business quarters.
- Directed UPS Service Provider team to 45% increase in new account sales lead growth.

EDUCATION

University of South Florida Tampa, FL Degree: Bachelor of Science Major: Marketing

Kayla Griffith

Pinellas Park, FL 33781 | 727-692-3457 | kaylagriffith@outlook.com

Work Experience

Legal Assistant III State Attorneys Office - Clearwater, FL March 2017 to May 2022

- Created weekly schedules, assigned work to, and supervised legal support staff; determined Legal Assistant and Attorney assignments; provided or coordinated training; created a positive and supportive work environment; promoted an equitable workplace that demonstrated an environment respectful of living and working in a multicultural society.
- Assisted with the oversight related to performance requirements and personal development targets for staff; provided instruction for performance improvement and development; evaluated performance and completed annual performance reviews.
- Created, organized, and maintained files while applying knowledge of legal procedures, terminology, and state and federal court rules and procedures.
- Organized court files; created and implemented office policies and procedures; assisted senior staff with development of new programs and resources.

Shift Supervisor - lead Dispatcher Knight Enterprises, LLC - Clearwater, FL 2012 to 2017

- Responsible for interviewing, hiring and training new employees.
- Handled supervisory calls from customers, assisted technician with troubleshooting and resolving customer accounts and equipment issues.
- Completed daily reports with stats of technicians /jobs over six counties.
- Assisted with quality assurance in monitoring and quality control of assigned representatives.

Scale House Manager & Accounts Receivable Sonny Glassbrenner Inc - Clearwater, FL February 2010 to 2012

- Determined content of material entering /leaving facility to properly bill the customer.
- Accepted or rejected waste load based on content; suggested alternatives based on special waste, type of waste and/or local market training.
- Balanced and reconciled the daily receipts to ensure accurate record keeping and appropriate billing; deposited daily receipts into the safe depository.
- Documented the waste entering /leaving the facility, utilizing truck scales and computer systems to track total amount of waste entering the facility and sales of materials leaving the facility in compliance with DOT regulations.

Education

Massage Therapist in Massage Therapy Cortiva Institute-Florida - Pinellas Park, FL 2009 to 2010

High school diploma Osceola High School - Largo, FL 2003 to 2006

Some College in Political Science SPC - Saint Petersburg, FL

MICHELLE GUALTIERE

St. Petersburg, FL • 727.599.4172

chell_lg89@hotmail.com

Consummate support professional dedicated to simplifying the lives of busy executives.

- ☑ Friendly and courteous administrative assistant with excellent interpersonal, verbal, and written communication skills, offering 13+ years' experience performing organizational support and effectively coordinating busy schedules.
- ☑ Possess wide-ranging experience in seamlessly managing multifaceted administrative and customer service duties.
- ☑ Self-motivated and collaborative disposition – always delivering on commitments and promises in a timely manner.
- ☑ Proven record of loyalty, dependability, accountability, and adaptability, while maintaining a strong work ethic.

- | | | |
|------------------------------|---------------------------------|-----------------------------------|
| ▪ Administrative Support | ▪ Fleet Management | ▪ Analytical/Critical Thinker |
| ▪ Customer Engagement | ▪ Computer & Software Knowledge | ▪ Proficient Typist & Data Entry |
| ▪ Excellent Listener/Patient | ▪ Adaptable Team Player | ▪ Accurate/Detailed Recordkeeping |
| ▪ Impeccable Phone Conduct | ▪ Scheduling & Staffing | ▪ MS Office Suite |

PROFESSIONAL HISTORY

BREAKTHRU BEVERAGE GROUP, Cicero, IL. / Hybrid, covering over 10 states. (2021- Current)
North American beverage alcohol wholesaler driving innovation in the marketplace.

Customer Care Associate

Responsible for providing world class service in a leading edge call center environment by processing incoming orders and resolving customer inquiries in a professional manner to support the sale and marketing of our supplier brands.

- Ensure that sales are captured by responding to customers and entering orders accurately and efficiently in SAP. Ensure customer inquiries are successfully resolved through the use of multiple customer support tools (including conducting research in SAP and/or contacting business units as appropriate).
- Maintain world class standard by successfully performing against department scorecards and metrics. Identify and seek to continuously exceed service requirements of business units by building and managing relationships with customers and contacts at each unit.
- Establish and maintain world class customer relations by developing a rapport and actively listening to gain more information where necessary by providing consultative support and recommendations.
- Identify and evaluate opportunities to increase customer retention, maintain customer confidence and protect operations by keeping information confidential, and sustain satisfaction by suggesting alternatives to out of stock or limited quantity items and informing customers of available deals, etc.
- Other duties as assigned

BERT'S BARRACUDA HARLEY DAVIDSON, St. Petersburg, FL (2019 to 2021)

Selling, repairing, servicing, and general merchandising of Harley motorcycles, parts and motorclothes.

Floor Manager/ Motorclothes Associate

Entrusted to open and close the motorclothes department on a daily basis. Proven ability to drive sales based on upselling techniques. Employ excellent leadership skills for our team and assistant department manager.

- Named employee of the month August 2019 for continuous dedication and commitment.
- Top sales from November 2020- January 2021
- Managed, counted, verified and reconciled daily cash register sales to include handling customer returns.
- Greet and assist customers on the floor daily; recommend products and upsell different products.

...continued

BERT'S BARRACUDA HARLEY DAVIDSON, Floor Manager/Motorclothes Associate (continued)

- Train new employees on dealership and department procedures.
- Assist in stocking, inventory and merchandising. Manage multi-line phone system for whole dealership.
- Set daily sales goal for our department and ensure it is met.
- Oversee and update the online website with new product, fill orders and ship out to customers.

SUNCOAST COACH SERVICE INC., Clearwater, FL (2010 to 2019)

Building, repairing, and servicing mobile medical units for blood banks and hospitals across Florida.

Administrative Assistant/Fleet & Service Coordinator

Ensure customer satisfaction, working closely with CEO, bookkeeper, vendors, and customers to uphold and expand company brand. Effectively explain needed repairs to each customer based on technicians inspections and findings and schedule service appointments. Manage 35-50 buses and 25-35 courier vehicles.

- Arrange 8-10 work orders daily, communicating assignments to technicians; follow-up to ensure timely completion and satisfaction of each service agreement.
- Manage parts department, ordering supplies and fluids and distribute to service technicians; serve as point of contact for vendors, overseeing expenditures.
- Use various programs to maintain confidential, detailed, high-quality records for numerous customer accounts.
- Design and maintain spreadsheets for fleet vehicles, manage filing system for all vendor receipts, maintenance sheets, repair logs, tax exempt customers, and yearly 4th quarter tax exemption forms sent to vendors.
- Enter and maintain hours worked into staffing spreadsheets.
- Process, and or report any new hires, terminations, pay raises etc.
- Assist bookkeeper to make sure payroll is accurate and completed in a timely manner
- Update OSHA MSDS sheets for paint, body, and shop supplies.
- Manage shop line and direct line for service calls as well as email orders.
- Improved processes by implementing a new scheduling procedure based on customer availability.
- Established and set up new vendors throughout the state for two facilities and road mechanics.
- Performs copying, filing, scanning, shipping, scheduling, and various other administrative duties as assigned
- Consistently exceed 100% satisfactory ratings on employee reviews; recognized for being a fast learner, dependable, and working efficiently without supervision.

EDUCATION

LARGO SENIOR HIGH SCHOOL, Largo, FL – 21st Century Magnet Learning Arts Program; graduated with honors.
 HD University – Masters Certification
 National Academy of Sports Medicine-CPT

TECHNICAL SKILLS

SAP | Softphone | Workday | Microsoft Word, Excel, PowerPoint | NextGen |
 VSI | Dropbox | FleetVIP | Quickbooks | Talon | HD University

COMMUNITY INVOLVEMENT

Bayfront Convenient Care Clinic - Volunteer

Jamarius Hardin

Largo, FL 33773

jamariushardin12w4cme_k4x@indeedemail.com

+1 813 381 2597

Skills

- Communication skills
- Food preparation
- Customer service
- Organizational skills
- Stocking

Certifications and Licenses

Certified Notary Public

BRYAN MCDONOUGH

Saint. Petersburg, Florida · 727-254-6028
bryanjmcdonough@gmail.com - [LinkedIn](#)

EXPERIENCE

03/14/2022 – 05/06/2022

CREDIT QUALITY ANALYST BANK OF AMERICA/ICON INFORMATION CONSULTANTS

- Provide loan fulfillment support for Global Operations.
- Review and approve different kinds of loans.
- Link critical documents to relevant packages on online databases.
- Forward critical documents and information to involved parties.

10/08/2020 – 03/11/2022

GENERAL CLERK II, DEXTERA CORPORATION/NMFS SERO

- Maintain and organize office files, type correspondence, reports, and other documents.
- Schedule meetings, make photocopies, scan documents.
- Provide administrative support to ensure effective operations.
- Sign off on received packages and deliver mail to assigned areas of work site.

EDUCATION

AUGUST 2018 - JULY 2020

MASTER OF SCIENCE IN INFORMATION, FLORIDA STATE UNIVERSITY

AUGUST 2016 – AUGUST 2018

BACHELOR OF ARTS IN HISTORY, UNIVERSITY OF CENTRAL FLORIDA

SKILLS

- Microsoft Office (Excel, Word, PowerPoint)
- Administrative and Clerical Methods
- Writing/Editing
- Data Entry and Analysis
- Database Management
- Collaborative Projects
- Content Creation
- Communication (Oral, Written, Visual)
- Detail-Oriented
- Information Organization and Retrieval

AWARDS AND ACTIVITIES

- FY20 Team Member of the Year Award. NOAA Southeast Fisheries Regional Office.
 - Louisiana Resource Center for Educators (LRCE) Library, Circulation Intern. Summer 2019. [Blog](#).
 - John C. Hitt Library. Archival Intern. Summer 2017. [Blog](#).
 - First Unitarian Church of Orlando. Archival Intern. Spring 2017. [Blog](#).
-

ALYSON S. OGLES
5304 60th Avenue North
St. Petersburg, FL 33709
(727)345-2522
oglesaly@yahoo.com

OBJECTIVE: To obtain a position to further my knowledge and skills acquired through my educational, professional, and personal experiences.

PROFESSIONAL EXPERIENCE:

August 2016 – Present

Magnet Secretary, Perkins Elementary, Pinellas County Schools

Responsibilities include performing numerous clerical and secretarial duties to organize, coordinate and schedule both Arts & International Studies activities, as well as school office activities. Assisting the school administrators in routine administrative tasks, conduct weekly school tours, perform public relations and coordinate communications between administrators, parents, students and the general public.

January 2014 – July 2016

Administrative Assistant, Windsor Preparatory Academy

Responsibilities include performing a wide variety of clerical and secretarial duties to organize, coordinate and schedule school office activities. Assisting the school administrators in routine administrative tasks; perform public relations and coordinate communications between administrators, parents, students and the general public.

August 2011 – December 2013

Retail Sales Lead, White House Black Market

Responsibilities included assisting customers with high end fashion selections, supervise sales team, creating merchandise floorsets, daily opening and closing duties, respond to and resolve customer issues or concerns, as well as various day to day administrative duties.

June 2004 – October 2011

Inside Sales Consultant, Marla Davidson Tile and Stone

Responsibilities included assisting clients with tile selections and design, providing client with product information and design sketches, updating showroom displays, catalog/price book updating, data entry, created sales orders and purchase orders, and accounts receivables and payables.

October 2002 – May 2004

Merchandise Coordinator, The Thompson Group/ Casual Living

Responsibilities included assisting buyers/ Catalog Manager in operational catalog processes of merchandising. Created purchase orders, requested samples from vendors, uploaded and cataloged product photos, completed and processed spec sheets and sample updates.

May 2002 – October 2002

Design Consultant, Storehouse

Responsibilities included retail sales, assisting customers with design selections, providing product information, and responding to and resolving customer concerns and issues.

EDUCATION:

BS Interior Design, University of Southern Mississippi, May 1999

Robert Spidella
727-954-4060
robertspidella@gmail.com

Skill Set:

- Accounting Professional with experience in bank reconciliations, preparing month-end journal entries, and resolving discrepancies with vendors.
- Excellent analytical, communication and organizational skills.
- Proficient in Microsoft Office (Word, Excel, and Outlook), Timberline, Navision, Tops, SAP QuickBooks software.

Professional Experience:

Manpower/Allstate
Administrative Assistant

March 2020- April 2020

- Depositing of insurance checks, processing towing and storage billing and reconciling customer accounts
- Office closed because of Corona Virus

Remodeling my house and traveling from June 2018 and until December 2019

Salon Centric - St. Petersburg, FL
Customer Master (Tax Department)

February 2017 – March 2018

- All salons wanting tax exempt status need certificate attached to account.
- Checking for Tax Certificates in Cert Capture, share drive, sales force, numerical and state - hard copy files and tax ware.
- Requesting tax certificates from salons that are missing via email and sending necessary forms.
- Verify certificates for accuracy and validity when received.
- Attaching certificates to cases and accounts.
- Sending certificates to Cert Capture for 3rd party validation and to hard copy file.

PODS - Clearwater, FL
AR Customer Solutions Specialist

January 2015 – November 2015

- Verify account, billing, payment, and delivery information.
- Correction of account information
- Process payments, refunds, voids for customers.
- Updating account and credit card information, cancel orders, adjustments.
- Transfer to other departments for additional issues

Onicon - Largo, FL (TEMP)
Multi State Sales Taxes

July 2014 – August 2014

- Create sales tax reports by state from invoicing.
- Calculate sales tax and verify to sales tax billing.
- Prepare Sales Tax Returns.

TSE Industries - Clearwater, FL (TEMP)
Accounts Receivable

June 2014 – July 2014

- Match PO's, shipping tickets to billing.
- Verify invoice billing to orders and mail Invoices.
- Enter and post checks, wire funds and credit card payments

**Point Brittany Administrative Corp - St. Petersburg, FL
Accountant**

August 2012 – June 2014

- Input of yearly budget for all buildings
- Input updated maintenance fees for all units
- Accounting support for eight corporations.
- Accounts payable, accounts receivable, collections, general ledger, filing, sales tax.
- Bank Reconciliations.
- Handled adjustments, corrections, journal entries, intercompany accounting, and online payments.
- Payroll, Human Resources, and Employee Benefits.
- Meet with Board of Directors for reviewing financial statements

**AARP Senior Employment Program - Pinellas Park, FL
Administrative Assistant**

October 2011 – August 2012

- Museum – reception, admissions, gift shop and security.
- Office reception, data input, file room management, and correspondence.
- File room management and client file audits.

**BCH Mechanical, Inc. - Largo, FL
Credit and Collections Administrator**

May 2005 – September 2009

- Collecting for all customer accounts.
- Communicating with customers on past due accounts and resolving any issues for payments.
- Reviewing customer payments for past due invoices for possible hold on accounts for additional work.
- Possible putting lien on property for unresolved non-payments.
- Processed accounts receivable including billings and collections.
- Submitting all document for all payment of billings including all lien releases.
- Resolving any billing problems or issues with customers.
- Processed accounts payable including matching packing slips and purchase orders, coding invoices, inputting invoices, printing checks.
- Resolving issues and problems with vendors.
- Coordinated accounts payable and accounts receivable for managing cash flow.

**International Sign Co. - Largo, FL
Accountant**

October 2001 – May 2005

- Collections for customer accounts.
- Reviewing past due accounts and resolving issues for payments.
- Sales tax reports for various state and municipalities.
- Lien Releases and possible property liens.
- Processed accounts payable including matching packing slips and purchase orders, coding invoices, inputting invoices, printing checks.
- Resolving issues and problems with vendors

Additional Experience

- Working with outside CPA's on audits
- Lien releases and property liens for non-payment
- Setting up complete set of accounting books
- Creating procedures manuals

Education:

University of South Florida - St. Petersburg, FL
Bachelor of Arts in Accounting

Peyton Zeman

Clearwater, FL

peytonzeman2_uyn@indeedemail.com

+1 720 498 3259

Willing to relocate: Anywhere

Work Experience

Head Start Teacher Assistant

Catholic Charities - Denver, CO

February 2022 to Present

I work in close contact with my teacher to create new lesson plans and learning experiences. We work with behavioral lessons and finding new ways to deal with behavioral issues to students who do not have a IEP yet. Our class contains 13 students from various backgrounds that we work with closely.

Child care coach

Liquid therapy - Bundoran, County Donegal

August 2021 to Present

I work with autistic and down-syndrome students teaching them how to surf, and about the ocean.

Social Media Manager

Pilates Plus - Cherry Creek Highlands, CO

December 2021 to May 2022

I ran all social media platforms, tic toc, Instagram, Facebook, indeed, podcasts, and Snapchat.

Dance Instructor

TaDa Dance Studio - Denver, CO

December 2021 to March 2022

I taught ballet and contemporary to children between ages 3-10. We worked on choreography and technique. I worked using games to teach technique to the younger kids, and More forced dance lessons for the older kids.

Intern

Denver Rescue Mission - Denver, CO

April 2021 to August 2021

I worked doing intake with men and some women experiencing homelessness.

Nanny

PRIVATE - Denver, CO

2016 to 2020

I work for this family on and off but heavy during the summer when needed.

Front Desk Receptionist

Foot Hills Golf Course - Lakewood, CO

April 2019 to August 2019

This was a summer job where I checked in people, wandered the phone, made tee times, and also worked in their store. We did many different tasks at this job like cleaning, stocking things, signing up people for things, wandering questions, and many more.

Center Associate

Foothills Park & Recreation District - Lakewood, CO
May 2018 to August 2018

This job I checked in people to the pool, sold pool passes, helped with any concerns, also counting money and inventory was a big part of this position.

I also worked in the concession stand, and sold snacks and drinks, and per paired different snacks and foods. I helped stock the shelves.

After School Care Assistant

Evergreen Country Day school - Evergreen, CO
August 2016 to December 2017

In this particular job, I worked with kids from the ages of two and three year olds all the way to twelve and thirteen years old after the school day. We helped them with homework and things they had to do for class, and watched and played with them till there parents picked them up.

Summer Camp Assistant

Evergreen Country Day School - Evergreen, CO
May 2015 to August 2017

This job I was the assistant to whoever was the teacher of the camp that particular week. I worked with kids from the age of 4 years old to the ages of 11 and 12 year olds. We worked with kids on basic principles but also had fun with them because it was summer camp.

Education

College Degree in psychology/ Social work

Northern Arizona University - Denver, CO
August 2019 to Present

High school or equivalent

Mullen High School
2015 to 2019

Skills

- Copying
- Printing
- Copier
- Receptionist
- Customer Service Skills
- Microsoft Word

- Scheduling
- Filing
- Data Entry
- Babysitting
- Childcare
- Nannyng
- Experience with Children
- Toddler Care
- Excel (7 years)
- Day care
- Special needs
- Organisational skills
- Early childhood education
- Hospitality
- Laundry
- Public health
- Food service
- Restaurant experience
- Customer support
- Social media management
- Adobe Photoshop (3 years)
- Social media management (2 years)
- YouTube (2 years)
- Sales (4 years)
- Marketing (2 years)
- Media arts (1 year)

Certifications and Licenses

CPR/AED

November 2018 to November 2020

I am CPR, and AED certified. I also have my first aid certification as well.

Assessments

Early childhood development — Highly Proficient

February 2021

Knowledge of the development of children ages 0-3 and of ways to foster that development

Full results: [Highly Proficient](#)

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

TO: Mayor Robert Howell and Council
FROM: Peter Cavalli, Town Manager
DATE: June 3, 2022
RE: Finance/Accounting Specialist | Resumes

DISCUSSION

To assist in providing administrative staff to the Town of Kenneth City's Town Hall, management has collected a number of resumes for the Town Council to review in their efforts to provide coverage for the Town Hall.

Staff has attached the current Finance/Accounting Specialist Job Description and 14 resumes that were collected. Several of these applicants seem to be potential employees for the Town of Kenneth City.

FINANCIAL IMPACT

The requested salary range for this exempt position range between \$41,330 to \$61,996 annually (plus benefits).

CONCLUSION

Staff respectfully requests direction, if any, to proceed with the selection and hiring of one of the applicants discussed above for the position of Finance/Accounting Specialist.



**The Town of Kenneth City Invites Applications for
the Position of:**

Finance/Accounting Specialist

Salary: \$41,330 to \$61,996 Annually, DOQ

Opening Date: March 21, 2016

Closing Date: Open until filled

General Description of Duties

Performs intermediate paraprofessional work with emphasis in preparing, maintaining and interpretation of a variety of financial reports and accounting records, with routine work in accounts payable and receipt; Performs human resources generalist and duplicative duties in absence of the Town Clerk. Does related work as required. Work is performed under regular to limited supervision by the Town Manager or Town Clerk, and is evaluated through observation, conferences, and the quality and effectiveness of work completed. Reports to Town Manager.

Examples of Essential Job Functions

The duties recorded below are representative of the duties of the class and are not intended to cover all the duties performed by incumbent(s) of any particular position.

Reviews, monitors and processes a variety of fiscal transactions. Reconciles accounts. Maintains records. Receives and accounts for cash transactions. Performs billing. Reviews accounts payable transactions for accurate documentation. Authorizes and processes payments. Performs purchasing functions. Develops and monitors budgets and financial reports. Assists in compiling information pertaining to budgets, accounts, inventories and other financial operations. Enters data onto spreadsheets, ledgers, worksheets and/or other forms. Performs payroll duties, as needed. Responds to inquiries; checks accounting transactions to resolve discrepancies. Prepares and maintains 1099 vendor records and tax filing documents. Performs human resources generalist duties including benefits and risk management, meanwhile maintaining a thorough, working knowledge of state and federal employment laws and public sector human resources practices. May support research administration activities such as monitoring grant funding and expenditures. Performs related responsibilities as required.

Minimum Training & Experience

Bachelor's degree in finance, accounting, business or a related field, and a familiarity of local government finance, accounting or business principles is preferred, or

Two years college with courses in finance, accounting, human resources or public administration, supplemented by two-years related experience. An equivalent combination of education, training, and/or

experience may be considered in lieu of the educational requirements for this position.

Thorough, working knowledge of computers, software and other modern office equipment, including MS Word, Excel, and Publisher is required. Experience in Tyler Technologies – Fund Balance software strongly preferred.

Candidate must be highly motivated and organized, and possess an interest or ability to learn new tasks while being able to interact pleasantly and positively with the general public, vendors, and other employees.

Must possess a valid Florida Driver's License.

Please note: Preference may be given to motivated candidates with 1 to 2 years of municipal finance, accounting, human resources and/or a public administration background with an interest in obtaining a position within a progressive community who, after obtaining 3-5 years of experience, will be poised to advance to a progressively responsible municipal position elsewhere, to ultimately further their overall career objectives.

ADA Compliance

This is sedentary work requiring the exertion of up to 25 pounds of force occasionally and a negligible amount of force frequently or constantly to move objects. Work requires fingering, grasping, and repetitive motions; vocal communication is required for expressing or exchanging ideas by means of the spoken word, and conveying detailed or important instructions to others accurately, loudly, or quickly. Hearing is required to perceive information at normal spoken word levels, and to receive detailed information through oral communications and/or to make fine distinctions in sound; visual acuity is required for peripheral vision, preparing and analyzing written or computer data, operation of machines, operation of motor vehicles or equipment, determining the accuracy and thoroughness of work, and observing general surroundings and activities. The worker is not subject to adverse environmental conditions.

The Town of Kenneth City is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the employer will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

Ramzi Al Barghouti

Nationality: Jordanian & US ,Citizen
Marital Status: Married & 5 Kids
Mobile: +1-239-295-4921
Date of Birth: 15/07/1959
E -Mail: ramzibar59@hotmail.com
ramzibar59@gmail.com

OBJECTIVE:

To work in a Leading Successful Accountant Firm which will provide me with the opportunity to grow and improve my skills and understanding further whilst being able to demonstrate my creativity, hard working attitude and ability in the field of Financial.

PROFESSIONAL EXPERIENCE:

1 - S & O Grocery, S & O Grocers, Florida, USA Oct. 2016 – Up to Day
Fort Myers

Position: Financial Manager

Company profile:

S&O Grocery , S & O Grocers is a regional well known and respected Trading firm which specializes for Food items & Real Estates , S & O was established in the USA in 1997.

Responsibilities:

- Manual & computerized Accounting up to finalization and monthly& yearly Trial Balance , Monitoring, Controlling Cash Flows
- Follow up debtors and reconciliation of their Accounts
- Monitoring Receivables review and finalize monthly collection reports
- Customers statement auditing and reconciliation
- Preparing Weekly Payroll for 210 Employees and issued the payroll checks
- Preparing entry, receipts, Payment vouchers & entry in accounts program
- MIS report printing for auditing use like:
 - Cash flow Statement, jobs coasting Statement.
 - Invoice wise register report, Customer wise profitability report.
 - Monthly sales register, list of outstanding bills.
 - Aging analysis AR/AP.

Ending years report, Final P/L Statement, Balance Sheet & Income Stat.

2- Jouzy Consulting Engineers, Dubai, UAE Oct. 2008 – Up Sept.2016

Position: Financial Manager

Company profile:

JCE is a regional well known and respected engineering firm which specializes in the traffic impact studies as well as road design and infrastructure, power plant. JCE was established in the UAE in 1975.

Responsibilities:

- Organizing and assigning day-to-day work schedule to the accounts staff.
- Verifying analyzing and interpreting accounting records for the organization.
- Liaison with External Auditors.
- Closely monitoring and verifying branch accounts on daily basis.
- Preparation & Submission of the monthly Balance sheet, Income, Expenses Statement & Cash Flow.
- Monthly Reconciliations with bank, Vendors & Inter – Company branch Acc.
- Fixed Assets Management
- Providing For Year – end accruals and pre-payment
- Review and implement effective internal control policy relating to credit control.
- Periodic reconciliation of Inventory and close coordination with sales& logistics
- Working Knowledge of costing methods and apportionment of overheads.
- Prepare and present the financial statement as per the international Financial Reporting Standards.

3- Dar Al Sada Printing & Advertisement Co., Dubai, UAE
Feb. 1999 – Up Oct. 2008

Position: Chief Accountant

Company profile:

one of the largest companies of the press and advertising in the Arabian Gulf, Dubai-based, 100% owned by the Dubai government, and issued by several magazines, brochures and books of poetry have several delegates and agents in all the Arab countries and foreign, and dealing with all publishing houses in the world to market their versions and publications,

Responsibilities:

**** Supervisor in the accountant Department*

- Administration function.
- Control of Credit and assessment of credit limit to customers.
- Liaison with collection Department / Finance Manager and other Managers
- Clearance all petty cash for all sales & Purchasing Staff.
- Control the assets & depreciation
- Bank Reconciliation, Auditing all entries & Assist Finance Manager in Issuing Budget P/L Statement and Balance sheet .
- Preparing, Reviewing Payroll & Overtime sheets for more than 300 Employee
- Manual & computerized Accounting up to finalization and monthly & yearly Trial Balance , Monitoring, Controlling Cash Flows
- Follow up debtors and reconciliation of their Accounts
- Monitoring Receivables review and finalize monthly collection reports
- Customers statement auditing and reconciliation
- Preparing cheques, Payment vouchers & distribution the accounts
- Preparing entry, receipts, Payment vouchers & entry in accounts program
- MIS report printing for auditing use like:
 - Cash flow Statement, jobs costing Statement.
 - Invoice wise register report, Customer wise profitability report.
 - Monthly sales register, list of outstanding bills.
 - Aging analysis AR/AP.

Ending years report, Final P/L Statement, Balance Sheet & Income Stat.

4 - *Al Ahli Certified Public Accountants., Dubai, UAE*
Oct. 1996 – Up Feb. 1999

Position: Senior Auditor

Responsibilities:

- To Prepare Detailed Audit report.
- To review accounts of taxpayers and also conduct on-site audits
- Evaluate the finances of a taxpayer to find out tax liability.
- Report to management about asset utilization and audit results, and recommend Changes in operations and financial activities
- To collect and analyze the data to find out if there is any fraud, violation of laws, Regulations and management policies, duplication, etc.
- To inspect the account books of a company for analyzing the transactions And efficiency of the accounting procedures.
- To report the management of the company regarding the audit results and Suggest changes in financial activities and operations of the company.
- Prepare, analyze, and verify annual reports, financial statements, and other records, Using accepted accounting and statistical procedures to assess financial Condition and facilitate financial planning.

5- *Emiral Aluminium & Contracting Co., Dubai, UAE*
May. 1992 – Up June. 1996

Position: Vice Manager

- **Computer Science & Operation System - Sawalha Computer Est. 15/11/1991**
- **Computer Basic Program - International Educational Institute 15/8/1986**
- **Professional Of all aspects Computer Skills - Arab Land Bank 01/11/1986**
- **Commercial Correspondents - Jordanian Management Institute 02/03/1991**
- **Microsoft Excel (Net.G)- New Horizons-Computer Learning Centers 15/9/2001**
- **Human Resource - Dubai Institute For Human Resource Develop. 18/06/08**

COMPUTER SKILLS:

- **Typing Skills**
- **Excellent Knowledge of Computer Applications (Win Word, Excel, Power Point and Internet)**
- **Oracle Accounting Program**
- **Peachtree Complete Accounting**
- **Daceasy Accounting System**
- **Quick Books**

LANGUAGES :

- ***Arabic (Mother Tongue): Native in writing, reading and conversation***
- ***English: Advanced in writing, reading and conversation.***

REFERENCES:

- **David Particle - Auditor and Tax Preparation.
+1-813-400-7241**
- **Monther Abu Alroub - Accountant & Auditor.
+1-413-455-8292**



KELLY CLAUSING

Enthusiastic accounting professional

Saint Petersburg, FL 33713

kclaus0514@gmail.com

727-509-4753

Enthusiastic accounting professional with the following skills: billing, auditing daily reports, high-volume, full cycle AP, vendor account recs, some AR including processing daily cash receipts and preparing daily deposits, collections, and company credit card reconciliations. Also possess logistics experience including processing bills of lading, inventory management, and truck coordination. Authorized to work in the US for any employer.

WORK EXPERIENCE

Accounts Payable Specialist

SNI Staffing Now – Tampa, FL

March 2021 to October 2021

Placed on long term assignment in the accounting department for an Electrical Component organization located in St. Petersburg, FL. Responsible for daily filing, monitoring on AP email, printing all vendor invoices received, distribute to individual responsible for entering invoices in the accounting system. Responsible for processing COD payments, verify vendor record information and updating record accordingly as needed or requested. Responsible for reconciling vendor statements with vendor accounts to confirm all invoices on statements are accounted for, request any missing invoices. Provide payment statuses and assist with data entry as needed. Enter credit card transactions, complete other projects as assigned.

Accounts Payable Associate

Creative Financial Services – St. Petersburg, FL

December 2020 to January 2021

Placed on temporary assignment processing back log of accounts payable invoices and reconciling vendor statements. While on assignment received some training with bank reconciliations using Epicor accounting software.

Accounts Payable Specialist

Home Performance Alliance – St. Petersburg, FL

July 2019 to October 2020

Maintain vendor files some paper and the rest digitally. Record all invoices for payment, process weekly check runs, record all credit card purchases for reconciliation with statements. Process payroll for 1099 workers. Distribution of daily mail. Enter new employees into HR system for w2 employees, process terminations, Income Withholding orders and return correspondence as necessary on an individual basis. Set up new vendors in accounting system, maintain vendor files and other various duties as they arise through the course of any given day.

Server

Jedi Garden Family Rest – Griffith, IN

December 2018 to May 2019

Main responsibilities consisted of serving meals, drinks, desserts, and appetizers to dine-in customers seated in my section. Assisted seating customers and taking carry out orders. Also responsible for taking to go orders via phone which included prepping sides (soups, salads, rolls & butter, etc.)

Sales Office Assistant

Robert Half Legal – Griffith, IN

January 2018 to December 2018

Placed on temporary assignment responsible for the scanning of load documents into inventory management system “Load” folder with proper labeling. Maintain email inbox responding to assigned vendors confirming load requests and assisting with the scheduling of pick and delivery. Coordinate rescheduling load pick up and deliveries due to any number of unforeseen issues that may arise such as weather conditions, traffic, or a delay during loading. Enter information regarding incoming rail cars as received in inventory management system. Assorted, miscellaneous projects as needed.

Accounts Payable Specialist

Champion Logistics Group – Northlake, IL

February 2014 to December 2017

Process freight and non-freight invoices with appropriate required backup for payment within my assigned letters. Research and resolve discrepancy issues that may arise during invoice processing. Handle all correspondence (email & regular mail) pertaining to my assigned accounts. Maintain account information to ensure accuracy of company files including reconciling vendor statements. Process weekly check run, separating out those checks over \$10k for additional signatures. Maintain all vendor files. Set up new vendors in accounting system after all required documentation is received. Part of rotation calendar to assist with covering receptionist lunch and breaks (answer phones & distribute mail, receive packages and greet guests and announce their arrival).

Server

Hickory Hills Country Club – Hickory Hills, IL

July 2016 – December 2018

Assist with the set-up of banquet room tables for formal dinner parties ranging from High School reunions, charity functions, weddings, cotillions and to gulf outings. Responsible for keeping kitchen clean and stocked. Also, responsible for serving soups, salads, sometimes appetizers, dinner entrees (either family style or plated) and dessert). Also, responsible for clearing all dishes and utensils for cleaning. Once party is overstayed to help strip down tables so that linens can be picked up with ease for cleaning.

Guest Services Representative/Night Auditor

Red Roof Inn – Chicago, IL & Columbus, OH

October 2006 to March 2016

Assist guests with the check in and check out process. Process new reservations and/or cancellations received via email and telephone. Assist guests with recommendations, directions, and reservations for activities. Print evening shift reports and pre-audit reports. Review reports for accuracy making any corrections and/or adjustments as needed to pre balance the ledger. Review direct bill information for accuracy before they are submitted to clients for payment. Run computer backup and reorganization of files then run computerized audit to change system to next day's business. Open first shift and prepare housekeeping sheets for GSRs, pre-assign rooms if availability is there. Other projects as needed and requested by management.

EDUCATION

Master's in Accounting

Keller Graduate School of Management

September 2017 to June 2019

Bachelor's in Business Administration, majored in Accounting

DeVry University

July 2009 to August 2016

SKILLS

Microsoft Office Products (Outlook, Word, Excel, PowerPoint & Microsoft Dynamics AX), AS400, SAP, Oracle, QuickBooks, Epicor and Mfiles

Lisa Daffron

Office Manager/Finance Manager - Finance Management

Saint Petersburg, FL 33709

lisadaffron4_sy7@indeedemail.com

+1 727 455 2341

Willing to relocate: Anywhere

Authorized to work in the US for any employer

Work Experience

Office Manager/Finance Manager

Finance Management - Saint Petersburg, FL

April 2011 to Present

- * Oversee the daily operations and aligned workflow to complete a compilation of accounting and administrative duties.
- * Manage financial planning and accounting functions which includes billing, generating payroll checks, check writing, balancing accounts, month-end, expense reports, financial statements and monthly schedules, floor planning,
- * Finance Management duties - calling deals into the banks for approvals, closing the deal with customer, selling extended warranties
- * Developed a structured, organized and goal based environment and encouraged cooperation among staff to produce high levels of teamwork, morale and motivation through constant recognition
- * Performed audits on each individual department, finance contracts and submitted all findings to the president/owner
- * Analyzed and tracked buyer trends, ensured products and inventories were available to support a high volume sales objective

Accounting Clerk

Tyrone Square Mazda - Saint Petersburg, FL

March 2010 to December 2010

Accounting functions, which includes accounts payable and receivables, billing, check writing, balancing accounts, month-end, expense reports, financial statements and monthly schedules

sales

Lokey Mercedes - Clearwater, FL

December 2007 to March 2010

Clearwater, Florida

Accounting 12/07 - 3/10

- * Manage financial planning and accounting functions for three separate dealerships, which includes billing, generating payroll checks, check writing, balancing accounts, month-end, expense reports, financial statements and monthly schedules
- * Train Sales Representatives and Finance Managers on how to prepare DOC's, sales logs and out-of-state paperwork to streamline and expedite all administrative procedures

- * Provide executive level support to the Office Manager and Controller, assist other departments throughout the dealership, effectively prioritize tasks and implement key initiatives to ensure an accurate and timely completion of all projects

Store Controller

JD Byrider - Pinellas Park, FL

December 2006 to December 2007

- * Oversaw the daily operations and aligned workflow to complete a compilation of accounting and administrative duties, which included bank reconciliations, payroll, petty cash, accounts payable, accounts receivable, asset management, expenses and month-end
- * Developed a structured, organized and goal based environment and encouraged cooperation among staff to produce high levels of teamwork, morale and motivation through constant recognition
- * Managed and trained four multi-level employees, evaluated their development, productivity, quality of service and identified improvements to enhance their performance
- * Performed audits on each individual department, service repair orders, finance contracts and submitted all findings to the corporate office
- * Analyzed and tracked buyer trends, ensured products and inventories were available to support a high volume sales objective

Warranty / Service Clerk / File Clerk

Climate Design Air Conditioning - Clearwater, FL

June 2006 to December 2006

- * Communicated with customers, delivered high quality support when answering all service related inquiries and strengthened client relationships by using resourceful problem solving techniques when handling all discrepancies
- * Followed-up with existing accounts to schedule maintenance appointments and improve customer relation efforts
- * Used skillful questioning to identify the clients service objectives and sold warranty and maintenance contracts to meet their requirements
- * Posted invoices, processed and refunded service agreements to establish an accurate record of all closings

Accounts Payable / Title Clerk / Receptionist

Cindy Chevrolet, Inc - Wildwood, FL

February 2006 to June 2006

- * Created sales reports and financial statements, posted, processed and researched accounts payable entries to reconcile the general ledger, resolve billing complications and inputted all data into the computerized system
- * Completed point-of-sale transactions, balanced cash and credit card receipts for a high volume dealership
- * Interacted with customers and promptly responded to all inquiries in a courteous and efficient manner

Title Clerk

Nick Nicholas Ford - Inverness, FL

October 2005 to February 2006

- * Managed title and accounting functions for two dealerships, processed automobile sales, W-9's, bank deposits, refunded checks, balanced cash drawers, monthly schedules and accounts
- * Trained a new Title Clerk on CVR and scheduling procedures

* Hired as an Accounts Payable and Accounts Receivable Clerk, promoted to Bookkeeper and Title Clerk

Bookkeeper

Walker Ford - Clearwater, FL
November 2004 to October 2005

Retail Billing Clerk

Dimmit Chevrolet - Clearwater, FL
January 2000 to November 2004

Title Clerk / Accounts Payable

Dayton Andrews Dodge - Saint Petersburg, FL
December 1997 to April 1999

Accounting Clerk

Lokey Mercedes - Clearwater, FL
Accounting

- Manage financial planning and accounting functions for three separate dealerships, which includes billing, generating payroll checks, check writing, balancing accounts, month-end, expense reports, financial statements and monthly schedules
- Train Sales Representatives and Finance Managers on how to prepare DOC's, sales logs and out-of-state paperwork to streamline and expedite all administrative procedures
- Provide executive level support to the Office Manager and Controller, assist other departments throughout the dealership, effectively prioritize tasks and implement key initiatives to ensure an accurate and timely completion of all projects

Education

High School Diploma in Education

Fireside Christian School

Skills

- accounting
- Accounts Payable
- Payroll
- Quickbooks
- General Ledger Accounting
- General Ledger Reconciliation
- Bank Reconciliation
- Financial Planning

Amy Duke

Experienced Property/Business Manager

Kenneth City, FL

amyduke7_4zd@indeedemail.com

+1 727 325 7834

I have extensive customer service and management experience, and enjoy a challenge. I love problem solving and providing the best possible experience for the guest. My management experience includes Property Management, which I have a passion for. This includes specializing in tax credit properties. I have a proven track record of keeping my properties at 100% occupancy with zero tenant complaints. I truly value my residents and their input.

Willing to relocate: Anywhere

Authorized to work in the US for any employer

Work Experience

Customer Service Representative

American Power & Gas - Seminole, FL

June 2021 to Present

- Assisted customers with a warm and professional attitude
- Processed orders, refunds and customer transactions
- Kept records of customer complaints
- Interacted with customers through live chat
- Assisted customers with questions
- Handled emails, inbound calls, and outbound calls

Community Manager

LEDIC Realty Company, LLC - Gulfport, MS

March 2017 to April 2018

As the Community/Property Manager, my responsibilities include but aren't limited to:

Overseeing the everyday functions of the property and staff; all inquiries regarding availability; processing all applications along with credit and background checks; preparing and submitting applicant files to compliances for certification, as this is a tax credit property; preparing leases for qualified applicants; collecting rent and making deposits; serving 3-day notices and following through with filing any evictions (IF NEEDED); scheduling any vendor call outs and processing their invoices to submit all information to my assigned AP clerk and accountant; keeping all tenant certifications current and in compliance; preparing and submitting all weekly and monthly reports to the appropriate parties, while meeting deadlines throughout the day; all marketing and advertising, as well as PR.

Case Manager

Airbnb - Clearwater, FL

June 2015 to March 2017

Property Manager

South Hampton Townhomes

2012 to 2015

Emergency Medical Dispatcher

American Medical Response

2008 to 2011

Dispatcher police and fire

Gautier Police Department

2006 to 2008

Customer Service Representative/Call Center

Cingular Wireless

2000 to 2005

Store Manager

E-Z Serve convenience stores

1995 to 2000

Education

GED

Mississippi Gulf Coast Community College

Skills

- Social Media (9 years)
- Fundraising
- Microsoft Office, Microsoft Word, Excel, Oracle, Buildium, Yardi, One Site (5 years)
- Yardi
- Property Management (5 years)
- Marketing (9 years)
- Accounts Payable (9 years)
- Accounting (9 years)
- Office Management (9 years)
- Scheduling (9 years)
- Operations (9 years)
- Training (8 years)
- Payroll (9 years)
- inventory (8 years)
- Inventory Management (8 years)
- Microsoft Word (10+ years)
- Word
- Team Building (10+ years)
- Excel (5 years)

- Leadership Experience (10+ years)
- Supervising Experience (9 years)
- Customer Service (10+ years)
- Onsite (1 year)
- credit
- Management (9 years)
- Real Estate
- Time Management (10+ years)
- Conflict Management (10+ years)
- Property Leasing (5 years)
- Administrative Experience (10+ years)
- Typing (10+ years)
- Medical Terminology (5 years)
- Medical Billing (3 years)
- Bartender Experience (3 years)
- Communication (10+ years)
- Organizational Skills (10+ years)
- Fair Housing Regulations (5 years)
- Public Relations (10+ years)
- Microsoft Outlook (10+ years)
- Accounts Receivable (10+ years)
- Bookkeeping (8 years)
- Research
- Pricing (10+ years)
- Public Relations
- Fair Housing Regulations (5 years)
- Microsoft Outlook (10+ years)
- Negotiation
- Accounts Receivable (10+ years)
- Sales
- Medical Coding (3 years)
- Medical Coding
- ICD-9

Certifications and Licenses

Advanced Emergency Medical Dispatch

January 2009 to Present

This certification teaches you how to properly provide, in most cases, frantic callers with, life saving instruction and techniques capable of preserving life, Pre arrival to the assigned ambulance.

Driver's License

BLS for Healthcare Providers (CPR and AED)

September 2020 to September 2024

Assessments

Customer Focus & Orientation — Highly Proficient

January 2020

Responding to customer situations with sensitivity

Full results: [Highly Proficient](#)

Project Management Skills: Time Management — Proficient

February 2020

Prioritizing and allocating time to effectively achieve project deliverables

Full results: [Proficient](#)

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Joann Friedwald

Clearwater, FL 33764

joannfriedwald6_6hn@indeedemail.com

+1 914 573 8774

Authorized to work in the US for any employer

Work Experience

Senior Accounting Specialist

Jackson Inc - Clearwater, FL

August 2013 to March 2022

Manager of multiple business accounts. Accounts payable, receivable, payroll, logistics for manufacturing clients. Human resource management. Recruiting, posting ads, interview potential employees, on board.

Perform background checks. Code and enter vendor invoices

- Obtain payment approvals for pricing and freight discrepancies
- Able to process and enter 100+ invoices per day
- Process check runs
- Reconcile vendor statements
- Research and correct discrepancies
- Maintain accounts payable files
- Special projects as assigned

Office Manager

Mat-Su Emergency & Safety Supply - Palmer, AK

November 2007 to June 2013

Owner: Dave Kilmer (907) 775-3808

Provide CEO assistance to include managing calendar for meetings, travel arrangements and all general office support. Assist customers with retail products in showroom and web store. Process cash and credit card payments for merchandise. Using Microsoft Word composed business letter correspondence from little oral or written direction. Maintain accounts payable and purchase orders using Quickbooks Pro, complete and submit all credit applications. Collections on delinquent accounts and daily cash management. Scanning government contracts for bids on a daily basis Schedule crews all over the State of Alaska in various State Trooper barracks for repair and installation of all lighting equipment installed on their vehicles. I was the team leader for all remote conferences. Making all travel and lodging arrangements. Human Resources contact. Manage group health plan.

Front Office Manager

Las Vegas Surgery - Las Vegas, NV

September 2002 to July 2007

Supervisor: Mary Nelson (650) 342-4347

Front office duties to include answering a multi line phone system. Appointment setting. Processed payments for doctor's office visits; obtained pre-authorizations from insurance companies. Submitted bills to private and public insurances. Extensive experience using office fax and office machines. Performed a high volume of filing and data entry for medical records maintenance.

Education

B.S. in BUSINESS ADMINISTRATION

MERCY COLLEGE - Dobbs Ferry, NY

1989

Skills

- Bookkeeping
- Accounts Payable
- Quickbooks
- Accounts Receivable
- Logistics

Certifications and Licenses

Driver's License

Assessments

Accounting Skills: Bookkeeping — Familiar

August 2019

Calculating and determining the accuracy of financial data.

Full results: [Familiar](#)

Accounting Skills: Bookkeeping — Familiar

December 2019

Calculating and determining the accuracy of financial data

Full results: [Familiar](#)

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Joan Hart

10814 Navajo Dr. #17 Saint Petersburg, FL 33708 727-215-3226

Objective:; To become an integral part of a rapidly growing team at a company in the Accounting Department as an Accounts Payable Specialist or Accounting Assistant/Clerk. Capable of matching, batching, and coding invoices, processing expense reports, updating and reconciling sub-ledger to G/L, processing checks, and resolving A/P issues.

Experience:

SunCoast Professional Inspection Services Saint Petersburg, Fl June 2011 – Current

Bookkeeper / Home Inspectors Assistant

- Assist Home Inspectors performing inspections
- Prepared inspection reports accurately
- Created, monitored and maintained all Social Media Accounts and company website
- Prepared bank account reconciliations
- Posted daily accounting activity, Prepared daily inspection reports to GC
- Prepared month end financial reports

TDMG Clearwater, Fl

March 2009 - June 2011

Cash Specialist

- Created daily and weekly cash reports for management
- Reviewed expense reports for accuracy and proper distribution
- Prepared 12 Bank reconciliations daily

Gunn Allen Financial Services Tampa, Florida

June 2003 - March 2005

Accounts Payable Manager

- Facilitated successful internal and external audits for NYSE and ASE.
- Composed effective accounting reports summarizing A/P detail
- Supervised all A/P clerks and monitored invoice processing
- Posted cash receipts and bank account reconciliations
- Researched and reconciled G/L discrepancies ● Prepared and distributed company expense reports

SKILLS:

- QuickBooks, Micros, PeopleSoft, Lawson, Windows
- Accounts Payable/Cash Specialist
- Detail Oriented, Analytical reasoning, Critical Thinking
- Proficient in Microsoft Office and Excel
- Team player, Corporate Accounting
- Adept at streamlining accounting procedures
- Provide support to internal business partners
- High attention to detail, possesses excellent analysis, organizational and writing skills

Michelle Heystek

Senior Accountant

Pinellas Park, FL 33781

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+1 727 631 7825

Strong communication, problem solving and analytical skills with over twenty years' experience in the accounting field for both private and public sectors. Ability to prioritize and organize work to meet multiple accounting deadlines with a high degree of accuracy and productivity, both independently and collaboratively in a team environment.

- Ability to manage multiple companies in the maintenance of accounts payable/receivable, general ledgers, general journals, and preparation of accurate financial reports.
- Effective application of Generally Accepted Accounting Principles (GAAP).
- Proficient in the use of software, including Sage 50, Adobe Acrobat Pro, Microsoft Office, SharePoint, and Excel.
- Strong organizational skills and ability to apply methods to streamline and decrease paperwork to eliminate duplication and reduce errors.

Authorized to work in the US for any employer

Work Experience

Senior Accountant

NAPBL (dba, Minor League Baseball) - Saint Petersburg, FL

January 2015 to Present

- Participate in the preparation for year-end audits (6 affiliated entities) (Internal).
- Reconcile accounts, general journals monthly to ensure accurate reporting, and analyze financial statements for discrepancies. Error free bank reconciliations for the past 9 years, in account amounts exceeding \$2,000,000.
- Manage accounts payable, accounts receivable and research discrepancies, duplicate payments, receipts, in a timely manner.
- Reconcile credit card statement, review for inconsistencies and missing entries in the General Ledger.
- Maintain fixed assets and associated depreciating schedule; provide general journal entries to insure proper recording of new purchases and disposals.
- Participate in the implementation of a system for 90+ staff for business credit cards, reducing errors, and eliminating redundant manual processes and time needed for completion by 75%.
- Prepare and provide a cost analysis associated with online revenue checks issued to 160 clubs each month, used in key decision making by senior executives.
- Continuously identify inefficient processes and implement improvements.
- Create various Excel spreadsheets to streamline a financial process and reduce errors.

Staff Accountant

NAPBL (dba, Minor League Baseball) - Saint Petersburg, FL

January 2011 to December 2015

- Provide support to create accurate and timely financial records for the National

Association of Professional Baseball Leagues (NAPBL) and affiliated entities.

- Ensure all transactions are recorded properly within the consolidated financial statements in accordance with General Accepted Accounting Principles (GAAP).
- Manage accounts payable, accounts receivable.
- Prepare monthly bank reconciliations (6 affiliated entities) (Internal).
- Prepare monthly, quarterly, and annual financial statements for review by executives.

School Bookkeeper II

Pinellas County Schools, Boca Ciega High
January 1996 to December 2011

In accordance with Accounting Policy & Procedure; Manage and control discretionary budgets, work within grant fund guidelines issued by state.

- Establish, control, and ensure departmental budget deadlines were met to meet district deadlines. Educate faculty each year on policies and procedure.
- Generate journal entries to provide accurate financial statements in preparation for year-end audit (internal).
- Participate in bidding, assisting, and approving furniture, equipment, and audio visual for a newly constructed building with capital outlay funds exceeding \$2,000,000.
- Monitor and manage asset property inventory. Decreased missing inventory items from \$250,000/100 items to under \$5,000/10-15 items.
- Manage Assistant Bookkeeper.

Postal Clerk, E4

UNITED STATES NAVY
January 1999 to December 2007

- Process and dispatch official mail.
- Utilize the Postal Directory system software to research 500 plus military personnel for correct location. Researched the most cost-effective and efficient way to send mail to save money.

School Bookkeeper I

Pinellas County Schools Osceola High School
January 1996 to December 1998

- Manage accounts payable, accounts receivable funds (more than \$200,000.)
- Issue purchase orders and payments in a timely matter both internally and externally, in accordance with Accounting Policy & Procedures.

Education

Bachelor of Science in Management

University of South Florida - Saint Petersburg, FL
2010

Associate of Arts

St. Petersburg College - Saint Petersburg, FL
2005

Skills

- Ability to manage multiple companies in the maintenance of accounts payable/receivable, general ledgers, general journals, and preparation of accurate financial reports.
- Effective application of Generally Accepted Accounting Principles (GAAP).
- Proficient in the use of software, including Sage 50, Adobe Acrobat Pro, Microsoft Office, SharePoint, and Excel.
- Strong organizational skills and ability to apply methods to streamline and decrease paperwork to eliminate duplication and reduce errors.
- Accounting
- Bookkeeping
- Sage 50
- Microsoft Excel
- Account reconciliation
- Microsoft Office

Links

<http://LinkedIn.com/in/michelle-heystek>

Assessments

Spreadsheets with Microsoft Excel — Proficient

December 2021

Knowledge of various Microsoft Excel features, functions, and formulas

Full results: [Proficient](#)

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Janet Rivera

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(973) 277-7771

7497 10th St N St. Petersburg, FL, 33702

Work Experience

Accounts Receivable Coordinator

Amerilife - Clearwater, FL

November 2020 to Present

- Extensive reconciliation of daily cash received from acquired providers for the carriers (i.e Mutual of Omaha, Humana). Experience with commission statements and interpreting to obtain correct information. Manually break out revenue based on first year, renewal years and bonuses..etc. Critical thinking skills, transaction oriented, liaise with other departments if needed to get items booked correctly. Train new hires, ensuring they acquire correct processes and application of funds. Work with acquired providers on updating passwords or issues preventing in obtaining commission statements for the carriers

Account Receivable Manager

Gator Cases, LLC - Tampa, FL

February 2016 to May 2020

- Reconcile all company credit card statements with supporting receipts. After review of receipts, process paperwork for Florida taxes. File Florida taxes every month and Indiana's every year payment. Manage 2 major AR portfolios which need major attention and process their RMA's. Review outstanding receivables with AR Rep and initiate follow through with collection. Place accounts on Credit Hold until accounts are brought current and review line of credit. Initiate communication with 3rd party collections for further account escalation. Research and resolve deductions and process credits to clear balances caused by issues once validated. Place accounts on Credit Hold until accounts are brought current and review line of credit depending on delinquency and adjust accordingly. Process new applications and update current accounts for higher credit lines based on need of the customer's business and payment history. Process lockbox, live checks, ACH/Wires and credit card payments daily. Reconcile credit card and divisional General Ledgers on a weekly basis for month end. Manage AR portfolio which comprises various divisions and international accounts. Comprehensive review of outstanding receivables and initiate follow through with collection.

Credit and Collections Analyst

VeriFone, Inc - Clearwater, FL

April 2012 to February 2016

- Manage AR queue (Petro/Retail) and assist in preparation of weekly reporting including monthly forecasting.

Comprehensive review of outstanding receivables and initiate follow through with collection accounts as well being proactive on large receivables. Research and resolve deductions (pricing errors, over/under payments, missing items, etc.). Maintain timely and accurate records, customer communications and account reconciliations.

Frequent interaction with sales/field managers, sales support representatives and repair/contract departments to identify root causes and resolve issues.

Credit and Collections Analyst

Cunningham Lindsey US Inc - Tampa, FL

May 2011 to April 2012

- Manage monthly AR portfolio and assist in preparation of monthly reporting. Comprehensive review of outstanding receivables and initiate follow through with collection accounts. Research and resolve deductions (pricing errors, allowances, over/under payments, etc.) Maintain timely and accurate records, customer communications and account reconciliations. Frequent interaction with sales, finance and customer service personnel within the NorthAmerican business units to identify root causes and resolve issues.

Campus Student Loan Specialist (default

PREVENTION DEPT) Everest University - Tampa, FL

July 2010 to February 2011

- Comply with procedures to initiate contact with withdrawn students regarding their Federal Student Loan status. Identify and present options including repayment plans, deferments and forbearances as it relates to individual circumstance. Acts as liaison between borrowers and third-parties such as loan servicers.

Responsible for coordinating and communicating Exit Loan Counseling. Skip Tracing through various engines.

Senior Accounts Receivable/collections Specialist

Travelport - Parsippany, NJ

May 2005 to June 2009

- Provide customer service to the Customers regarding past due amounts. Investigate and research inquiries from the Customers. Actively pursue accounts receivable. Administer payment plans, follow-up on payment promises not received, recommend accounts for termination. Identify opportunities to improve operational efficiencies and accuracy. Prepare monthly status reports for the Senior Leadership Team.

Financial Analyst II

Travelport - Parsippany, NJ

September 2003 to May 2005

- Review and reconcile reports from the Franchisee against electronic data. Analyze, identify and resolve general ledger reconciliation issues. Monitor multiple financial system records to ensure amounts are correct. Assist in preparation and presentation of monthly financial review data used to measure business performance and productivity.

Senior Accounts Receivable/collections Specialist

Travelport - Parsippany, NJ

March 2002 to September 2003

- Provide customer service to the Franchisees regarding billing. Daily follow-up calls to acquire requested documents. Investigate and research inquiries from the Franchisees. Actively pursue accounts receivable. Negotiate amicable payment agreements with franchisees daily. Administer payment plans, follow-up on payment promises not received. Identify opportunities to improve operational efficiencies and accuracy. Assist in training new prospects.

Front Desk Associate

Marriott World Trade Center - New York, NY

June 1998 to September 2001

- Greet and assist guests with interdepartmental coordination as needed. Handle all payment transactions and exchanges. Research and process all guests' inquiries.

Accounts Receivable Collection Specialist

Marriott World Trade Center - New York, NY

March 1998 to June 1998

- Resolve credit card inquiries in question and issue credit when it is due. Pursue corporate clients in arrears and negotiate payment arrangements.

Accounting Intern

Marriott World Trade Center - New York, NY

March 1998 to June 1998

- Assist the Accounting department with the following, A/P in the preparation and payment of invoices, preparation of adjustment to accounts. Auditing banquet checks and other forms of group billing and reconciliation of accounts, preparing bank reconciliation and clear checks.

Education

Bachelors in Accounting

THOMAS EDISON STATE COLLEGE - Trenton, NJ

June 2008

Associates in Accounting

COMMUNITY COLLEGE - New York, NY

June 1998

Skills

- Spanish
- Business Level Speaking, Writing, & Reading Microsoft Office Accounting Data Entry Financial Analysis Tax Filing LICENSES AND Efficient professional with 21+ years of experience and a proven knowledge of accounts receivable, credit and collections, and financial analysis. Strengths include attention to detail, upbeat professional demeanor, good analytical skills and takes ownership.

Renee Ryan

Saint Pete Beach, FL 33706

reneeryan86_drd@indeedemail.com

+1 727 687 4921

Authorized to work in the US for any employer

Work Experience

Beach Concierge

Independent Self Employment - Saint Pete Beach, FL

May 2009 to March 2020

Assisted visiting tourists who visited from around the globe, that vacationed on Pinellas Beaches, find lodging, local attractions, exceptional dining experiences, and "night-life" activities and events. I aggregated my local insider knowledge base for the benefit of tourists' enjoyment.

Assistant Controller

Royal United Corporation - Moonachie, NJ

April 2006 to September 2007

- Process weekly payroll for 75+/- union employees.
- Process weekly payroll for administration staff, owners, and partners. All confidential.
- A/P for all companies including proper G/L coding.
- A/R for all companies including short payment disputes and correct G/L application of payments.
- Weekly reports for company's line of credit.
- Bank reconciliations for multiple entities.
- Workers' Compensation reporting and following up including first injury reports.

Remote Bookkeeper

Designed Learning - Westfield, NJ

April 2006 to June 2006

- A/P and A/R
- Bank reconciliation.
- Manual payroll for 10 employees.
- Reconciliation of credit card purchases and payments.

Payroll Consultant

PEOPLE Premier, Inc

December 2004 to December 2005

- Implemented new ADP Total Choice software.
- Maintain all employee records.
- Process payroll for several clients for 140+/- employees.
- Report monthly workers' compensation.
- Reconcile payroll deductions: all insurances, child support, and garnishes.
- Create and maintain all COBRA letters.

Clearwater, FL

Controller

Headway Technology/Phoenix Comm - New York, NY

January 1997 to February 2003

- Process bi-weekly payroll for 150+/- consultants (some 1099').
- Process bi-weekly payroll for administrative, sales representatives, and owners.
- Enter and record all deductions: Insurance, child support, garnishments, etc.
- Create and Excel Workbook for sales team commission recording and paying monthly.
- Invoice companies for consultants on a weekly, bi-weekly, and monthly basis.
- Code, batch, and process A/P.
- Maintain daily deposits, cash balance, and reconcile bank accounts.
- Manage A/R position and their duties; apply cash receipts and collections.
- Manage reception position and their duties.

Billing Clerk & A/R

C.G. Paper Inc - Secaucus, NJ

November 1992 to September 1993

- Billing products for 13 different companies.
- Cleaned aging of all invoices outstanding over 90 days.

Education

Associate

Skills

- Bank Reconciliation
- Workers' Compensation
- Account Reconciliation
- Accounts Payable
- QuickBooks
- Bookkeeping
- Accounts receivable

Assessments

Verbal communication — Expert

August 2020

Speaking clearly, correctly, and concisely

Full results: [Expert](#)

Attention to detail — Highly Proficient

March 2022

Identifying differences in materials, following instructions, and detecting details among distracting information

Full results: [Highly Proficient](#)

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Nicholas Singh

Pinellas Park, FL 33781 | (727) 324-8007 | nick021998@gmail.com |

OBJECTIVE

To obtain a position that will provide growth and opportunity where I can be effective with the utilization of my knowledge and skills, which will also present the opportunity to learn new knowledge in a professional atmosphere.

SKILLS

Hard: Microsoft Office: Word, PowerPoint, Excel, Outlook and Publisher. POS system, Sage 300, Collect-It.

Soft: Customer Service, analytical, technical, excellent communicator, problem solver, and organized

EDUCATION

Bachelor of Science in Finance (3.39 GPA)

May 2019 - August 2020

University of South Florida

Associate of Arts in General Studies (3.7 GPA)

August 2016 – July 2018

St. Petersburg College

Advanced Corporate Finance | Money and Banking | Principles of Finance |

Financial Statement Analysis | International Finance | Financial & Managerial Accounting

| Financial Institutions & Markets

EXPERIENCE

Finance Specialist

December 2020 – Current

Elite Medical Staffing

- Manage accounts in different states by building and maintaining existing relationships with current and new clients.
- Oversee all aspects of collecting payments due from accounts receivable.
- Conduct follow up calls and emails to clients regarding outstanding payments.
- Analyze, investigate and find solutions to problems that arise from clients about payments, invoices, or other discrepancies.
- Generate, organize and send invoices to all clients through mail and email.
- Assist in creating different statistical reports on excel to guide the company and our clients by presenting accurate and detailed information.
- Maintain customer portfolios, accounts receivable customer files and records, and up-to-date billing system.
- Analyze and complete monthly end reports in accuracy including bank reconciliation, payroll, and global cash accounts.

Sales Consultant

July 2019 – August 2020

Best Buy

- Expert in smart home technology, computers, televisions, cameras, and phones to increase sales and volume.
- Process front-end transactions by providing excellent customer service to guest and business partners.
- Analyzed and compare performance goals based on corporate guidance.

Full-Time Sales Associate

July 2016 – December 2018

Champs Sports

- Maintained an awareness of knowledge on past, current, and future product trends.
- Delivered personal and productivity goals while addressing customer needs.
- Teaming up with staff to ensure high levels of customer satisfaction.
- Process customer transactions and ensuring daily total are accounted for.
- Processed shipment and RTV shipments in an organized and detailed manner.

Sales Associate**August 2014 – June 2015**

Wagon Wheel Flea Market

- Provided service to customers to increase sales.
- Insured merchandising needs by means of restocking and visual displays.

Mechanic**June 2014 – August 2014**

R&D Auto Service

- Changed brake pads, rotors, oil filters, oil change, and tires.
- Maintain a clean shop, move cars, and wash cars.

VOLUNTEER**St. Pete General Hospital****August 2015 – June 2016**

- Provide assistance to patients and visitors by means of transport to various locations.
- Answered phone calls at the front desk and transferred calls to the correct department.
- Assist nursing, administration, and physician departments upon request.

Sheila Siretz

Largo, FL 33771

sheilamsiretz2_5c8@indeedemail.com

+1 727 580 9391

Reconciliations -Accounts Payables -Accounts Receivable -Inventory Control

- Purchasing -Billing/Invoicing -Taxes (Sales, Use)
- Vendor Management -Credit Review -Freight/Shipping -Month-End
- Scheduling -General Ledger -Payroll/HR -Industry Specific Software
- S2K System -CRM System -QuickBooks -Great Plains -Oracle-Netsuite

Authorized to work in the US for any employer

Work Experience

Bookkeeper

Roth Staffing Companies - Pinellas Park, FL

June 2021 to Present

AP & Purchase Order AP, General Accounting, JE

Staff Accountant

Churchill Stateside Group - Clearwater, FL

February 2019 to May 2021

- Entering and Processing A/P Invoices
- Printing & Mailing checks 5 Accounts
- Reconcile 50+ Monthly Bank Statements
- Draw Reconciliations
- Journal Entries
- Manual Payments, Wire & ACH's
- Verify & Posting Expense Reports

Accounting Associate

IT Resource - Palm Harbor, FL

January 2019 to February 2019

Bank Reconciliation - Year End closing entries

A/R Cash Applications

Collections

Accounting Clerk

Roth Staffing Companies - Clearwater, FL

March 2018 to November 2018

Accounts Receivable Full Cycle:

- Manual and Electronic Deposits
- Payments Application
- Invoicing Customers
- Processing COD Customer Payments

- Reconciling Customer Accounts
- Collections and Problem solving

Accounts Payable Full Cycle

- Creating, coding and printing daily purchase orders
- 3-Way Match A/P Invoices to P.O. and packing receipts
- Receiving Approval for invoice processing
- Entering and Processing A/P Invoices
- Reconcile Monthly Statements for Accuracy
- Reconciling Bank Statements

Software conversion and Reconciliation

Accounting Associate

McMullen Air Conditioning and Refridgeration - Saint Petersburg, FL

February 2017 to February 2018

- Creating, GL coding and printing daily purchase orders
- Matching A/P Invoices to P.O. and packing receipts
- Receiving Approval for invoice processing
- Entering and Processing A/P Invoices
- Reconcile Monthly Statements for Accuracy
- Verify and entering Payroll for Construction Employees
- Reconciling Bank Statements

Accounting Clerk

Robert Half Accountemps - Saint Petersburg, FL

September 2016 to February 2017

Contract)

- Accounts Receivable/ Accounts Payable

Accounting Assistant

Creative Financial Staffing - Tampa, FL

May 2016 to September 2016

- Created and entered General Ledger reports
- Enter journal entries into Accounting software - Jack Henry
- Reconcile General Ledger Accounts

Purchasing Assistant

Sky Hospitality, LLC - Dallas, TX

May 2015 to March 2016

which led to no fault layoffs.

Accounting Associate

Sky Hospitality, LLC - Saint Petersburg, FL

December 2013 to March 2016

Lead Accounting Clerk

Sky Hospitality, LLC

October 2014 to January 2016

- Supervised 3 Accounts Payable Clerks, which included: training, evaluation, and mentoring

- In charge of completing and submitting hotel credit applications and setting up new accounts with vendors/suppliers
- Accounts Payable-Full Cycle for 26 hotels across US
- Researched discrepancies and tracking of receipts for all monthly invoices
- Verified all vendor statements to purchase orders
- Received approval on all vendor invoices from hotel ownership
- Coded all payables into general ledger: followed by check runs to vendors
- AR-Verified all incoming payment received, tracked, reported, and balanced Cash Sheets
- Performed Night Audit by entering daily statistics in general ledger and reports
- Gather payroll reports, reconcile, audit and submit for payment
- Promoted to Purchasing Assistant after 1 year and 3 months of Lead Accounting Clerk position

Accounts Payable Clerk

Sky Hospitality, LLC

December 2013 to October 2014

- Accounts Payable-Full Cycle for 26 hotels across US
- Researched discrepancies and tracking of receipts for all monthly invoices
- Verified all vendor statements to purchase orders
- Received approval on all vendor invoices from hotel ownership
- Coded all payables into general ledger: followed by check runs to vendors
- AR-Verified all incoming payment received, tracked, reported, and balanced Cash Sheets
- Performed Night Audit by entering daily statistics in general ledger and reports
- Hired on as a temporary employee, then was brought on permanent, and finally promoted to Lead Accounting Clerk in just 10 months

Robert Half/ Account Temps - Saint Petersburg, FL

March 2013 to October 2014

- Accounts Payable-Full Cycle
- Accounts Receivable-Billing, Invoicing, and Cash Applications
- Collections-Contacted company's internal customers regarding past due invoices and scheduled future payments

Accounts Receivable - Payroll/HR Coordinator

Direct Mail Systems, Inc - Clearwater, FL

March 1999 to March 2013

- Composed and sent out monthly invoices of completed client jobs
- Cash Applications of all incoming payments to general ledger: followed by disbursements and daily bank deposits
- Tracked, maintained, and reconciled all client deposits
- Created and calculated all monthly sales commissions
- Served as a main contact for all clients and provided customer service for any payment questions or discrepancies
- Collections-Contacted company's internal customers regarding past due invoices, calculated finance charges, and scheduled future payments
- Calculated weekly and monthly payroll to hourly and salary employees, which included withholdings, deductions, time tracking, and reconciliations of sick and vacation time
- HR-Explained, enrolled, and adjusted weekly payroll for proper deductions according to benefits selected

ADDITIONAL EXPERIENCE

Thompson P.B.E - Finishmasters - Clearwater, FL
March 1996 to February 1999

Accounting Clerk

Accountants on Call - Tampa, FL
July 1994 to March 1996

Education

High school or equivalent

Skills

- payroll
- accounting
- quickbooks
- accounts payable
- credit
- Bookkeeping
- Filing
- Accounts Receivable
- Microsoft Office
- Data Entry
- Excel
- General Ledger Accounting
- Account Reconciliation
- Bank Reconciliation
- Journal Entries
- Microsoft Dynamics GP
- Office Management
- Auditing
- Salesforce
- Leadership

Robert Spidella
727-954-4060
robertspidella@gmail.com

Skill Set:

- Accounting Professional with experience in bank reconciliations, preparing month-end journal entries, and resolving discrepancies with vendors.
- Excellent analytical, communication and organizational skills.
- Proficient in Microsoft Office (Word, Excel, and Outlook), Timberline, Navision, Tops, SAP QuickBooks software.

Professional Experience:

**Manpower/Allstate
Administrative Assistant**

March 2020- April 2020

- Depositing of insurance checks, processing towing and storage billing and reconciling customer accounts
- Office closed because of Corona Virus

Remodeling my house and traveling from June 2018 and until December 2019

**Salon Centric - St. Petersburg, FL
Customer Master (Tax Department)**

February 2017 – March 2018

- All salons wanting tax exempt status need certificate attached to account.
- Checking for Tax Certificates in Cert Capture, share drive, sales force, numerical and state - hard copy files and tax ware.
- Requesting tax certificates from salons that are missing via email and sending necessary forms.
- Verify certificates for accuracy and validity when received.
- Attaching certificates to cases and accounts.
- Sending certificates to Cert Capture for 3rd party validation and to hard copy file.

**PODS - Clearwater, FL
AR Customer Solutions Specialist**

January 2015 – November 2015

- Verify account, billing, payment, and delivery information.
- Correction of account information
- Process payments, refunds, voids for customers.
- Updating account and credit card information, cancel orders, adjustments.
- Transfer to other departments for additional issues

**Onicon - Largo, FL (TEMP)
Multi State Sales Taxes**

July 2014 – August 2014

- Create sales tax reports by state from invoicing.
- Calculate sales tax and verify to sales tax billing.
- Prepare Sales Tax Returns.

**TSE Industries - Clearwater, FL (TEMP)
Accounts Receivable**

June 2014 – July 2014

- Match PO's, shipping tickets to billing.
- Verify invoice billing to orders and mail Invoices.
- Enter and post checks, wire funds and credit card payments

**Point Brittany Administrative Corp - St. Petersburg, FL
Accountant**

August 2012 – June 2014

- Input of yearly budget for all buildings
- Input updated maintenance fees for all units
- Accounting support for eight corporations.
- Accounts payable, accounts receivable, collections, general ledger, filing, sales tax.
- Bank Reconciliations.
- Handled adjustments, corrections, journal entries, intercompany accounting, and online payments.
- Payroll, Human Resources, and Employee Benefits.
- Meet with Board of Directors for reviewing financial statements

**AARP Senior Employment Program - Pinellas Park, FL
Administrative Assistant**

October 2011 – August 2012

- Museum – reception, admissions, gift shop and security.
- Office reception, data input, file room management, and correspondence.
- File room management and client file audits.

**BCH Mechanical, Inc. - Largo, FL
Credit and Collections Administrator**

May 2005 – September 2009

- Collecting for all customer accounts.
- Communicating with customers on past due accounts and resolving any issues for payments.
- Reviewing customer payments for past due invoices for possible hold on accounts for additional work.
- Possible putting lien on property for unresolved non-payments.
- Processed accounts receivable including billings and collections.
- Submitting all document for all payment of billings including all lien releases.
- Resolving any billing problems or issues with customers.
- Processed accounts payable including matching packing slips and purchase orders, coding invoices, inputting invoices, printing checks.
- Resolving issues and problems with vendors.
- Coordinated accounts payable and accounts receivable for managing cash flow.

**International Sign Co. - Largo, FL
Accountant**

October 2001 – May 2005

- Collections for customer accounts.
- Reviewing past due accounts and resolving issues for payments.
- Sales tax reports for various state and municipalities.
- Lien Releases and possible property liens.
- Processed accounts payable including matching packing slips and purchase orders, coding invoices, inputting Invoices, printing checks.
- Resolving issues and problems with vendors

Additional Experience

- Working with outside CPA's on audits
- Lien releases and property liens for non-payment
- Setting up complete set of accounting books
- Creating procedures manuals

Education:

University of South Florida - St. Petersburg, FL
Bachelor of Arts in Accounting

THOMAS STOLZ

119 Blue Stone Circle Winter Garden Florida 34787 ~ 347-956-0443 ~ thomas.stolz@nyct.com

CAREER PROFILE

Key Contributor & Effective Leader supporting financial/accounting roles in fast-paced and high-stress environments within a variety of industries. Experienced in handling high-level analysis functions, implementing unique business processes, and leading cross-functional teams. Equipped with a significant ability to leverage skills in project management and to introduce new tools for cost/time savings and efficiency improvements.

KEY COMPETENCIES

- ◆ Policy Analysis
- ◆ Financial Modeling/Reporting
- ◆ Process Improvement
- ◆ Internal/Field Audits
- ◆ Valuation Analysis
- ◆ Budgeting/Forecasting
- ◆ Attention to Detail
- ◆ Complex Problem Solving
- ◆ Internal Controls
- ◆ Project Management
- ◆ Capital Project Analysis
- ◆ Risk Management

PROFESSIONAL EXPERIENCE

METROPOLITAN TRANSPORTATION AUTHORITY, NEW YORK, NY

1994-PRESENT

Associate Transit Management Analyst-Internal Controls and Special Projects (2001-Present)

- Directly manage a variety of logistical functions within an organization which had over 63 thousand employees and \$9.7 billion in annual revenue
- Utilize exceptional analytical abilities to oversee all internal control reviews related to several special projects/programs in addition to leading 2 yearly internal audits of an environmental management system
- Played a lead role in achieving over \$1 million in savings through the development of more streamlined audit procedures in addition to making recommendations related to special projects
- Handle complex tracking of several large-scale initiatives which included overseeing the entire project lifecycle and ensuring all projects were completed both on-time and within set budget constraints

Assistant Transit Management Analyst-Capital Flagging Support Services/Capital Assets Mgmt. (1996-2001)

- Performed several analytical functions within a fast-paced environment with a concentration on reviewing internal program reviews and overseeing all flagging requests for capital projects
- Monitored a \$550 thousand labor budget, handled in-depth reviews of requests for program access/protection, and worked closely with cross-functional teams within the organization
- Led the design of a database which supported TA labor requirements were correctly submitted for the yearly flagging budget along with creating unique presentations highlighting program goals and metrics
- Oversaw the daily management of a database used within the Federal Transit Administration which highlighted all New York City Transit assets and resulted in improved internal controls
- Managed fixed assets with funding from the city and state funding in a quarterly report on a regular basis.

Assistant Transit Management Analyst-Station Program Planning & Development (1994-1996)

- Facilitated the development of financial data reports related to Capital Program Management which were used by the CFO and other members of executive management

EDUCATION

Bachelor of Science, Business Administration

ST. JOHN'S UNIVERSITY

Emmanuel Vixamar

Brandon, FL

evixamar5_srm@indeedemail.com

+1 813 365 2272

Staff Accountant Profile

Dynamic and detail-oriented professional with progressive experience in performing and managing all aspects of daily accounting operations.

Proven record of preparing, examining, and analyzing accounting records, consolidating financial statements, and relevant reports to assess accuracy, completeness, and conformance with reporting and procedural standards. Adept at furnishing month / year- end accounts, completing vendor process, and preparing reconciliations for all accounts. Excel at generating, reviewing, and evaluating all types of reports, data, and customer invoices. Instrumental in reviewing accounts to identify discrepancies and reconcile differences. Skilled in developing and improving processes to drive innovation and excellence in business operations.

Adept at fostering positive relationships with internal and external stakeholders, clients, auditors, and senior management.

Articulate communicator possesses excellent interpersonal, planning, problem-solving, multitasking, pressure handling, time management, written/verbal, analytical, attention to detail, and organizational skills.

Willing to relocate: Anywhere

Work Experience

Construction Project Accountant

NDC Construction - Bradenton, FL

January 2020 to Present

Track reimbursable expenses to projects by analyzing and compiling data. Engage in multiple tasks, such as processing invoices, checking payment discrepancies, preparing monthly journal entries, and reviewing purchasing orders. Collaborate closely with project managers to analyze aged accounts reviewable and manage accounts. Leverage professional expertise in managing contract modifications, timely submission of 75% funding letters, risk authorizations, and financial contract deliverables, while working with contract department.

- Prepared client billings on multiple projects with individual valuations up to \$300M.
- Streamlined workflow and improved client retention by communicating actively with clients.
- Maintained financial records by preparing month-end general ledger journal entries and monthly closing reports.
- Identified and resolved subcontractor billing problems and clients project issues to achieve optimum outcomes.
- Utilized Timber Scan and Sage CFMS accounting system to manage averaging 350K per month posting of client invoices.

Accounts Payable / Receivable Specialist

Ten8fire & Equipment Inc. - Bradenton, FL

January 2019 to December 2021

Played a vital role in creating database for 1400+ vendors while processing 3-way inventory invoice matches; utilizing SAP 3- way invoice matching functionality. Maintained high-level accuracy in processing vendor invoices and weekly checks, ACH, and wire payment runs, as well as update PO log in SAP database (Navision). Finalized month-end financial close, conducted cost variance analysis, and performed special projects.

- Reconciled cash balances by handling daily cash receipts batches while processing debit / credit memos and implementing virtual credit card system / Tokenization (SlimCD).
- Maintained integrity of financial information by assisting in journal entries, bank reconciliations, cash flow statements, and balance sheets.

Staff Accountant / Assistant To CFO

Mote Marine Laboratory - Sarasota, FL

January 2014 to December 2018

Acquired expertise within the areas of billing operations, sales tax preparation, private and government grant review, and state laws and regulation compliance. Reviewed fixed assets and aged receivables; providing recommendations for bad debts write-off to CFO for approval. Assisted CFO in maintaining financial integrity by handling finance-related matters, reviewing P&L accounts, and preparing necessary journal entries.

- Oversaw fair presentation of financial statements by completing month-end procedures, including reconciliations, accrual entries, inventory, fixed assets, and deferred revenue schedules.
- Benefited managerial decision making by building 3-statement financial models in Excel with sensitivity tables and scenario analyses; utilizing VLOOKUP and Pivot tables.
- Improved liquidity position by reconciling A/P and A/R to the general ledger for month-end closing. Identified and resolved invoice related issues regarding contract billing and reporting.

A/P and Payroll Accountant

Voalte Inc. - Sarasota, FL

Accounts Payable Coordinator

REO Specialist, Michael Saunders & Company

Assistant Front Supervisor / Key Holder

Lowe's - Fruitville, FL

Account REP

Vengroff Williams & Associates- Capgemini Inc

Frontend Manager

Lowe's - PB&T and Company

Education

Certification

St. John's University - New York, NY

Certificate

Cornell University

Skills

- Accounts Management
- Account Reconciliation
- Strategic Planning & Execution
- Financial Statements
- Liabilities Management
- Team Building & Leadership
- Process Improvement
- Regulatory Compliance
- Cross-functional Collaboration Microsoft Office (Word, Excel, Outlook, PowerPoint)
- Microsoft Dynamic A/X
- SAP
- NetSuite
- COUPA
- Concur
- Financial Force (online expense reporting)
- Navision
- Financial Edge
- Oracle SAP
- VLOOKUP / Pivot table
- Timberscan
- Sage

Certifications and Licenses

Six Sigma Yellow Belt



IMAGINE
THAT

Transition Services

Professional
Management

Executive Team










Immediate Short-Term Needs

Accounting
Services

Code
Enforcement

Revenue Analysis

-  Review ACFR and Annual Budget
-  Review of current revenue sources
-  Comparative Tax and Rate Study
-  Analysis & Evaluation of current Ad Valorem Base
-  Ad Valorem Supported versus Assessment Supported Activities

Professional Services & Technology Assessments



Build list of contracts and services providers



Identify multiple options for solutions



Develop ITB, RFQ or RFP as needed



Ensure proper procurement



Negotiate agreements along with legal counsel



Annual Budget

Prepare Program Based Annual Budget

Workshop(s) with Town Council

Compliance Requirements for Adoption



Interim Town Clerk

Notices

Council Meeting Functions

Custodian of records and official seal

Administer oaths as necessary

Prepare agenda for council meetings

Interim Town Manager

Daily/Weekly

Bank Deposits, Sign Checks
Backup Servers
Website Updates
Manage Staff / Task Orders
Weekly Reports

Monthly

Current Vendor
Management
Council Agenda Prep
Council 1-to-1s
Town Council Meetings



IMAGINE

THAT

AGREEMENT FOR PROFESSIONAL MUNICIPAL MANAGEMENT AND EXECUTIVE SERVICES

This Agreement for Professional Municipal and Management Services (the “Agreement”) is made and entered into by and between TOWN OF KENNETH CITY, a Florida municipal corporation organized pursuant to the laws of the State of Florida (the “TOWN”), and IMAGINE THAT PERFORMANCE, LLC, of 18133 Portside Street, Tampa, Florida 33647 (the “COMPANY”), to set forth the terms and conditions of certain professional services to be provided to Town by the Company, in the manner set forth herein. This Agreement is made effective as of June 8, 2022 (the “Effective Date”). Town and Company may be referred to herein individually as a “Party” and collectively as the “Parties.” This Agreement and the Exhibits, Appendices, and Addendums, attached hereto as incorporated herein by reference and shall be referred to collectively as the “Agreement.”

WHEREAS, the TOWN requires professional municipal management and executive services to assist government operations from time to time;

WHEREAS, the COMPANY can offer resources, proficiency, and desires to offer professional transitional services to the TOWN as described herein to serve a valid public purpose which is in the best interest of the TOWN; and

WHEREAS, time is of the essence to ensure that these essential executive level functions are diligently discharged to ensure the continued preservation of the public’s health, safety, and wellness facilitated by TOWN’s stable operation.

NOW, THEREFORE, in consideration of the mutual covenants, promises, and representations contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1. SCOPE OF SERVICES. Imagine That Performance, LLC hereby agrees to provide, and TOWN agrees to accept, the Services in accordance with the terms and conditions of this Agreement and as further outlined in the Exhibits attached hereto, including but not limited to:

- Exhibit C: Interim Town Manager
- Exhibit D: Accounting and Code Enforcement Solutions
- Exhibit E: Revenue Analysis and Professional Services Solution Identification
- Exhibit F: Annual Budget Preparation and Compliance
- Exhibit G: Interim Town Clerk

Additional Services may be added in the future with properly executed Task Order(s) using EXHIBIT A: TASK ORDER TEMPLATE and EXHIBIT B: HOURLY RATE SCHEDULE.

2. PAYMENT. Payment shall be made to COMPANY for the Services set forth herein, on those terms further agreed upon by the Parties in a Task Order. Regular invoices will be submitted to the Town by Company according to the executed Task Order(s), and the TOWN shall remit full payment to Company for the Services within fourteen (14) calendar days of receipt thereof. Payment due to Company hereunder will be made by check and in U.S. dollars and will be remitted to Company's address specified in the applicable invoice. TOWN agrees and acknowledges that in the event it fails to pay for the Services on the terms set forth in the applicable Task Order, such failure will constitute a material breach of this Agreement entitling Company to immediate termination hereof without penalty, in addition to any other remedies available at law.

3. AGREEMENT TERM. This Agreement shall commence on the Effective Date and will automatically terminate three (3) years thereafter (the "Initial Term"), unless sooner terminated by either Party in accordance with the terms of this Agreement. Thereafter, this Agreement may be renewed only upon mutual written agreement of the Parties (each a "Renewal Term" and together with the "Initial Term," the "Agreement Term").

4. WORK PRODUCT OWNERSHIP. Any copyrightable works, ideas, discoveries, inventions, patents, products, or other information (collectively the "Work Product") developed in whole or in part by COMPANY and delivered to Town as part of the Services will be the exclusive property of TOWN. Upon request, COMPANY will execute, within a reasonable period of time, all documents necessary to confirm or perfect the exclusive ownership of TOWN to the Work Product. Upon termination of this Agreement, COMPANY will return to TOWN all records, notes, documentation and other items that were used, created, or controlled by COMPANY during the term of this Agreement.

5. INDEMNIFICATION. COMPANY agrees to indemnify and hold TOWN harmless from all claims, losses, expenses, fees including attorney fees, costs, and judgments that may be asserted against TOWN that result from the acts or omissions of COMPANY and/or COMPANY's employees, agents, or representatives.

6. DEFAULT. The Parties hereby agree that the occurrence of any of the following events, actions, or omissions shall constitute a material breach of this Agreement, causing the breaching Party to be in default hereof:

- a. The failure by a Party to make a required payment when due.
- b. The insolvency or bankruptcy of either Party.
- c. The subjection of any of a Party's property to any levy, seizure, general assignment for the benefit of creditors, application or sale for or by any creditor or government agency.
- d. The failure by Company to provide the Services on the terms and conditions of this Agreement and/or any applicable Task Order.

7. TERMINATION. Either Party may terminate this Agreement for any reason or no reason, by providing written notice to the other Party of its intent to terminate. In the event the Town provides a written notice of termination to Company, Company will immediately cease all

work being performed hereunder and/or under any applicable Task Order, unless the Parties agree otherwise. Upon termination of this Agreement by either Party, any and all amounts due to Company for providing Services will be remitted to Company no later than fourteen (14) calendar days after the Agreement's termination date. Company will further reimburse the COMPANY for any agreed-upon, non-cancellable expenses incurred by Company in connection with the Services.

8. SURVIVAL. The terms contained in this Agreement pursuant to **Sections 4 (WORK PRODUCT OWNERSHIP), 5 (INDEMNIFICATION), and 9 (REMEDIES)** shall survive the termination of this Agreement and will remain in full force and effect after expiration hereof.

9. REMEDIES; TERMINATION FOR CAUSE. In addition to all other rights a Party may have available at law, either Party may immediately terminate this Agreement if the other Party fails to substantially perform any material provision, term or condition hereof (including without limitation the failure to make a monetary payment when due) and fails to cure such default within fifteen (15) calendar days of receiving written notice thereof. Notice of the default shall be provided to the defaulting Party with sufficient detail so as to allow the defaulting Party to ascertain the nature of the default. In such event, termination by the non-defaulting Party shall be deemed a termination "For Cause" entitling such Party to terminate this Agreement immediately and without penalty. Unless waived in writing by the non-defaulting Party, the failure by the defaulting Party to cure the default(s) within the fifteen-day cure period shall result in the automatic termination of this Agreement.

10. FORCE MAJEURE. If performance of this Agreement or any obligation under this Agreement is prevented, restricted, or interfered with by causes beyond either Party's reasonable control (a "Force Majeure Event"), the Party so affected by the Force Majeure Event shall, upon giving written notice to the other Party, be excused from such performance to the extent of such prevention, restriction, or interference provided that the affected Party shall use its best commercial efforts to avoid or remove the causes of its nonperformance, and shall continue performance whenever such causes are removed. The term "Force Majeure Event" as used in this Agreement means, but is not limited to, acts of God, fire, explosion, vandalism, storm or other similar occurrence, orders or acts of military or civil authority, or by national emergencies, insurrections, riots, or wars, or strikes, lockouts, work stoppages or other labor disputes, or supplier failures. Any act or omission that is within the reasonable control of the Party whose performance is required is not excused under this Section 10 if such Party, or its employees, officers, agents, or affiliates, had a reasonable opportunity to remove or avoid the cause of non-performance prior to the time at which performance became impossible or impracticable.

11. ENTIRE AGREEMENT. This Agreement and the Exhibits, Appendices, Addendums, and Task Orders incorporated herein constitutes the entire agreement of the Parties with respect to the subject matter hereof and replaces and supersedes all prior agreements and discussions between the Parties with respect to such subject matter.

12. SEVERABILITY. In the event any term of this Agreement is held to be invalid or unenforceable by a court of competent jurisdiction, such invalidity or unenforceability shall not

affect the validity or enforceability of the remaining terms hereof, nor of the application or meaning of such term as defined or applied in any other jurisdiction.

13. AMENDMENT. This Agreement may not be modified or amended except as mutually agreed to in a writing signed by both Parties hereto.

14. INDEPENDENT CONTRACTOR. Company shall provide the Services to TOWN in the capacity of an independent contractor. Nothing herein contained shall be construed as vesting or delegating to COMPANY or its officers, employees, agents, or subcontractors, any rights, interest, or status as an employee of TOWN. TOWN shall not be liable to any person, firm or corporation that is employed by, contracts with, or provides goods or services to the COMPANY in connection with the performance of this Agreement or for debts or claims accruing to such parties. COMPANY shall promptly pay, discharge, or promptly take such action as may be necessary and reasonable to settle such debts or claims.

15. NOTICES. Any notice permitted or required to be made under this Agreement shall be in writing and signed by the Party giving such notice, and shall be deemed given and received by the other Party when transmitted: (i) by hand delivery, (ii) by overnight courier service; (iii) forty-eight (48) hours after being deposited in the U.S. mail as certified or registered mail with postage pre-paid, addressed to the Party to be notified or directed to such other address as may be supplied in writing; or (iv) when delivered by electronic mail. Notice shall be sent to a Party as follows:

If to the TOWN:

Robert Howell, Mayor
Town of Kenneth City
6000 54th Avenue North
Kenneth City, FL 33709
Phone: 727-498-8948
Email: howellr@kennethcityfl.org

If to the COMPANY:

Rob Duncan, Managing Director
Imagine That Performance, LLC
18133 Portside Street
Tampa, FL 33647
Phone: 813-699-9614
Email: rob@imaginethatperformance.com

16. LIMITATION OF USE OF TOWN STAFF AND ASSETS. COMPANY'S staff assigned to provide the Services under this Agreement shall not be permitted to utilize any TOWN personnel, equipment, electronic systems, or other TOWN subcontractors to perform any work or project of any kind other than to assist in the performance of the scope of Services outlined by this Agreement and attached Exhibits. Failure to strictly adhere to this provision shall be grounds for immediate removal of the offending staff or, if staff is not removed, termination of the Agreement.

17. MAINTENANCE OF RECORDS. All records created under this Agreement shall be the property of TOWN, and TOWN shall be responsible for custody and retention of such records. TOWN shall allow COMPANY access to business records solely for the purpose of COMPANY and its staff fulfilling the obligations of this Agreement. Pursuant to section 119.071, Florida Statutes, COMPANY shall comply with Florida's Public Records Act, Chapter 119, Florida Statutes, and agree to:

A) Keep and maintain all public records that ordinarily and necessarily would be required by Municipality to keep and maintain in order to perform Services under this Agreement.

B) Upon request from Municipality's custodian of public records, provide copies to Municipality within a reasonable time and public access to said public records on the same terms and conditions that Municipality would provide the records and at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.

C) Ensure that said public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law.

D) Meet all requirements for retaining said public records and transfer, at no cost, to Municipality all said public records in possession of COMPANY and SPINA upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from Chapter 119, Florida Statutes, disclosure requirements. All records stored electronically must be provided to Municipality in a format that is compatible with the information technology systems of Municipality.

E) IF COMPANY HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THEIR DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

Clerk Office Address: 6000 54th Ave. N. Kenneth City, FL. 33709 Phone: 727-498-8948

18. GOVERNING LAW. This Agreement shall be governed by and construed in accordance with the laws of the State of Florida without reference to its conflict of law principles. The Parties hereby agree that any suit, action or proceeding with respect to or arising out of this Agreement shall have as its venue and shall be litigated solely in the courts with jurisdiction over, Pinellas County, Florida.

19. WAIVER. The failure of either Party to require the strict performance of this Agreement, or the waiver by a Party of any breach hereof, shall not prevent the waiving Party's subsequent enforcement of this Agreement nor be deemed a waiver of any subsequent breach.

20. CONSTRUCTION AND INTERPRETATION. The Parties hereby agree that this Agreement is the result of good faith negotiations between the Parties and is entered into after having an opportunity to review, understand, and negotiate the terms hereof. No term contained in this Agreement shall be construed against either Party solely as the result of such Party's role in drafting this Agreement or any individual term contained herein.

21. ASSIGNMENT. Neither Party may assign or transfer this Agreement nor any obligation contained herein, without the prior written consent of the non-assigning Party, which consent shall not be unreasonably withheld.

22. OFFER EXTENDED TO OTHER ENTITIES. The TOWN encourages and agrees to the COMPANY extending the pricing, terms and conditions of this Agreement to other governmental entities at the discretion of the COMPANY. The TOWN acknowledges and agrees

that COMPANY will not be considered to have defaulted on or breached this Agreement by operation of Company's contractual relationship(s) with or any provision of Services to, other governmental or private sector entities.

23. EXECUTION OF AGREEMENT. This Agreement may be executed in one or more counterparts, including by means of facsimile, each of which shall be deemed to be an original, but all of which together will constitute one and the same instrument. Photocopies, fax copies, and electronic copies of signatures shall be deemed as legally binding as original signatures.

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be duly executed by their duly authorized representatives and will be made effective as of the date first written above.

TOWN OF KENNETH CITY

IMAGINE THAT PERFORMANCE, LLC

By: _____

By: _____

Robert Howell, Mayor

Robert Duncan, Managing Director

Date: _____

Date: _____

By: _____

Ana Cabezas, Clerk

EXHIBIT A: TASK ORDER TEMPLATE

This Task Order is made on the _____ day of _____, _____ pursuant to the Agreement for Services (the “Agreement”) dated ___ day of _____, _____, by and between the TOWN and COMPANY, to provide the scope of services in the manner set forth herein:

1) PROJECT DESCRIPTION: The TOWN desires the COMPANY to provide those services generally described herein as: _____

2) SCOPE OF SERVICES: COMPANY, through its identified staff, agrees to provide the following services:

3) FINANCIAL MATTERS: TOWN shall compensate COMPANY for services pursuant to the Agreement and the following:

4) TERM: This Task Order is effective until _____.

5) ASSIGNED RESOURCES: The COMPANY will each designate _____ as professional resources for this Task Order.

IN WITNESS WHEREOF, the parties hereto have caused this Task Order to be executed by their duly authorized representatives as of the date first above written.

TOWN

COMPANY

By: _____

By: _____

EXHIBIT B: HOURLY RATE SCHEDULE

The Hourly Rate Schedule will be used as a basis for additional Task Orders added to the Agreement for Services (the “Agreement”) dated 8th day of June 2022. The rate schedule will remain in effect until December 31, 2022:

The rates are subject to change each year and Company will provide an updated Rate Schedule each year. Previously approved and ongoing projects will not be subject to rate changes, any rate change will only impact future Task Orders that must be properly Executed.

Managing Director	\$ 175.00 per hour
Senior Consultant	\$ 125.00 per hour
Clerk/Records	\$ 90.00 per hour
Analyst	\$ 75.00 per hour
Administrative Assistant	\$ 50.00 per hour
Professional Facilitator	\$ 250.00 per hour

EXHIBIT C: INTERIM TOWN MANAGER

This Task Order is pursuant to the Agreement for Services (the “Agreement”) dated 8th day of June 2022, by and between the TOWN and COMPANY, to provide the scope of services in the manner set forth herein:

1) PROJECT DESCRIPTION: The TOWN desires the COMPANY to provide those services generally described herein as: Interim Town Manager

2) SCOPE OF SERVICES: COMPANY, through its identified staff, agrees to provide the following services:

Daily and Weekly Town Manager Tasks

- a) Manage Staff
- b) Bank Deposits & Make Change
- c) Sign Checks
- d) Website Updates
- e) Back up Servers
- f) Project Management and Update Meeting(s)
 - i) Status of projects including additional Task Orders associated with Agreement
 - ii) Decision points and management of scope and consultants
- g) Weekly Report
 - i) Detailed status of projects provided to Council in written report each week

Monthly Tasks

- a) Council Meeting Agenda Prep
- b) One to One Meetings with Council Members
- c) Attend Council Meeting
- d) Reconciliation / Bank Statement Review
- d) Departmental Performance Reviews
- e) Capital Projects Review
- f) Town Newsletter (with Town Clerk)
- g) NPDES and LMS Meeting Attendance
- h) Pinellas County City Manager Monthly Meeting
- i) Current Vendor Management
- j) Resident meetings (at request of Council Member)

Work Schedule

- a) Two days onsite in Town Hall each week
 - i) Upcoming office hours will be included in Weekly Reports
 - ii) Length of onsite time will vary according to need

- b) One scheduled virtual day each week
- c) All other days are “on call”

The Task Work is expected to average close to 20 hours per week, some weeks will have more and some less. The week before Council Meeting(s) and week of Council Meeting(s) have time consuming tasks (Agenda Preparation, One-to-One Meetings with Council Members and Attend Council Meeting).

3) FINANCIAL MATTERS: TOWN shall compensate COMPANY for services on a biweekly basis pursuant to the Agreement and the following:

- a) Hours will be billed at \$125/hour and tracked/logged in the weekly report
- b) For Billing Purposes, the “Work Week” will be Saturday – Friday
- c) Invoice for two weeks will be remitted Wednesday after 2nd Work Week.

3) TERM: The Transition will begin shortly after execution of the Agreement and Task Order. Upon separation of Town Manager the Interim Town Manager will be sworn in.

4) ASSIGNED RESOURCES: The COMPANY will designate Rob Duncan as lead for this Task Order upon separation date of the current Town Manager. Additional COMPANY resources will participate as needed to complete required tasks.

IN WITNESS WHEREOF, the Parties hereto have caused this Task Order to be executed by their duly authorized representatives as of the date first above written.

TOWN OF KENNETH CITY

IMAGINE THAT PERFORMANCE, LLC

By: _____

By: _____

EXHIBIT D: ACCOUNTING AND CODE ENFORCEMENT SOLUTIONS

This Task Order is pursuant to the Agreement for Services (the “Agreement”) dated 8th day of June 2022, by and between the TOWN and COMPANY, to provide the scope of services in the manner set forth herein:

1) PROJECT DESCRIPTION: The TOWN desires the COMPANY to provide those services generally described herein as: Identification and implementation of solution for Accounting and Code Enforcement services.

2) SCOPE OF SERVICES: COMPANY, through its identified staff, agrees to provide the following services:

Accounting

- a) Outline various paths:
 - i) Internal hire
 - ii) Outsourced bookkeeping / accounting services
 - (1) Staff only
 - (2) Turn-key solution inclusive of new software and staff
- b) Bring detailed options to Town Council and make recommendation
- c) Follow Town policies to implement chosen solution (items below if necessary)
 - i) Develop Specifications for Invitations to Bid, Request for Qualifications or Request for Proposals as needed to secure needed solutions for Town.
 - ii) Ensure procurement of all solutions achieved in accordance with Town Policies
 - iii) Negotiate agreements on behalf of Town and work with legal counsel to ensure proper protections for Town exist in future agreements.
 - iv) Solutions will emphasize best value to Town, documenting what revenue enhancement, cost reduction or efficiency improvements can be achieved.

Code Enforcement

- a) Document the detailed need
 - i) Current code, policies and procedures
 - ii) Discussions with all Councilmembers
- b) Outline various paths
 - i) Internal Hire manager by Administration
 - ii) Managed by Police Department
 - iii) Outsourced
 - (1) Partner with other Government Agency
 - (2) Partner with non-Government entity
- c) Build cost / benefit analysis for all potential solutions
- d) Bring detailed options to Town Council and make recommendation

e) Follow Town policies to implement chosen solution

- i) Develop Specifications for Invitations to Bid, Request for Qualifications or Request for Proposals as needed to secure needed solutions for Town.
- ii) Ensure procurement of all solutions achieved in accordance with Town Policies
- iii) Negotiate agreements on behalf of Town and work with legal counsel to ensure proper protections for Town exist in future agreements.
- iv) Solutions will emphasize best value to Town, documenting what revenue enhancement, cost reduction or efficiency improvements can be achieved.

5) FINANCIAL MATTERS: TOWN shall compensate COMPANY for services on a biweekly basis pursuant to the Agreement and the following:

- a) Hours will be billed at \$125/hour and tracked/logged in the weekly report
- b) For Billing Purposes, the “Work Week” will be Saturday – Friday
- c) Invoice for two weeks will be remitted Wednesday after 2nd Work Week.
- d) Task work is expected to be about 80 hours – Town will only be invoiced for actual hours.

6) TERM: The work will begin shortly after execution of the Agreement and Task Order and will be completed ASAP as urgent needs of the community.

7) ASSIGNED RESOURCES: The COMPANY will designate Lisa Hendrickson as lead for this Task Order. Additional COMPANY resources will participate as needed to complete required tasks.

IN WITNESS WHEREOF, the Parties hereto have caused this Task Order to be executed by their duly authorized representatives as of the date first above written.

TOWN OF KENNETH CITY

IMAGINE THAT PERFORMANCE, LLC

By: _____

By: _____

EXHIBIT E: REVENUE ANALYSIS AND PROFESSIONAL SERVICES SOLUTION IDENTIFICATION

This Task Order is pursuant to the Agreement for Services (the “Agreement”) dated 8th day of June 2022, by and between the TOWN and COMPANY, to provide the scope of services in the manner set forth herein:

- 1) **PROJECT DESCRIPTION:** The TOWN desires the COMPANY to provide those services generally described herein as: Revenue Analysis and Professional Services Solution Identification.
- 2) **SCOPE OF SERVICES:** COMPANY, through its identified staff, agrees to provide the following services:

Revenue Analysis

- a) Review ACFR and Annual Budget
- b) Review of current revenue sources
 - i) Legally available
 - ii) Additional Capacity
- c) Comparative Tax and Rate Study
- d) Analysis & Evaluation of current Ad Valorem Base
 - i) Taxable vs. Exempt
 - ii) Value/Income
 - iii) Parcel Tax Burden
 - iv) Growth Projections
 - v) Discussion of Annexations and Target growth
- e) Residential and Commercial Diversification
- f) Ad Valorem Supported versus Assessment Supported Activities
- g) Grants, Appropriations, Shared Services
- h) Investments
- i) Surplus Property
- j) Business Tax Receipts
- k) Forecasting and Relevant Policy

Professional Services & Technology Assessments – Procurement when Necessary

- a) Build Comprehensive list of all current contracts and services providers
 - i) Includes all professional services such as Legal, Engineering and Building Department, etc.
 - ii) Includes technology services such as website, accounting software, etc.
 - iii) Includes all other recurring / repeating expenses with a specific vendor
 - iv) Includes range of “expected costs” associated with each service / solution
 - v) List will be prioritized with input from Town Council
- b) Identify multiple options wherever possible for solutions to be offered to Town
- c) Develop Specifications for Invitations to Bid, Request for Qualifications or Request for Proposals as needed to secure needed solutions for Town.
- d) Ensure procurement of all solutions achieved in accordance with Town Policies

- e) Negotiate agreements on behalf of Town and work with legal counsel to ensure proper protections for Town exist in future agreements.
 - f) Solutions will emphasize best value to Town, documenting what revenue enhancement, cost reduction or efficiency improvements can be achieved.
- 4) **FINANCIAL MATTERS:** TOWN shall compensate COMPANY for services on a bi-weekly basis pursuant to the Agreement and the following:
- a) Hours will be billed at \$125/hour and tracked/logged in the weekly report
 - b) For Billing Purposes, the “Work Week” will be Saturday – Friday
 - c) Invoice for two weeks will be remitted Wednesday after 2nd Work Week.
 - d) Task work is expected to be about 240 hours – Town will only be invoiced for actual hours.
- 5) **TERM:** The work will begin shortly after execution of the Agreement and Task Order and will be completed during current 2022 Budget Year.
- 6) **ASSIGNED RESOURCES:** The COMPANY will designate JP Murphy as lead for this Task Order. Additional COMPANY resources will participate as needed to complete required tasks.

IN WITNESS WHEREOF, the parties hereto have caused this Task Order to be executed by their duly authorized representatives as of the date first above written.

TOWN OF KENNETH CITY

IMAGINE THAT PERFORMANCE, LLC

By: _____

By: _____

EXHIBIT F: ANNUAL BUDGET PREPARATION AND COMPLIANCE

This Task Order is pursuant to the Agreement for Services (the “Agreement”) dated 8th day of June 2022, by and between the TOWN and COMPANY, to provide the scope of services in the manner set forth herein:

- 1) **PROJECT DESCRIPTION:** The TOWN desires the COMPANY to provide those services generally described herein as: Identification and implementation of solution for Annual Budget Preparation and Compliance.
- 2) **SCOPE OF SERVICES:** COMPANY, through its identified staff, agrees to provide the following services:

Prepare Program Based Annual Budget

- a) Internal staff discussions
- b) Property appraisers initial estimate June 1st for forecasting.
- c) How are we ending the 2021/2022 fiscal year? What is in reserves?
 - i) Data collection
- d) Draft template and populate with information gathered.
 - i) Tie-in to Exhibit D: Accounting and Code Enforcement Solutions
 - ii) Tie-in to Exhibit E: Revenue Analysis and Professional Solution Identification
- e) Create nexus to CIP

Workshop(s) with Town Council (July/August - Professional Facilitation)

- a) Create a shared vision
- b) Prioritize programs
- c) Create consensus/buy-in/get direction

Compliance

- a) Review of State Statute
 - i) DR420 (select a tentative millage)
 - ii) Voting requirements for rollback/proposed millage, etc.
 - iii) Obtain E-Trim access to be filled out (Accounting firm)
 - b) Determine ARPA funding connections
 - c) Precise meeting advertisement two to three times with accurate dates/times
 - d) First Reading
 - e) Second Reading
 - f) Annual Financial Report to be sent to the Auditor General
- 3) **FINANCIAL MATTERS:** TOWN shall compensate COMPANY for services on a bi-weekly basis pursuant to the Agreement and the following:
 - a) Hours will be billed at \$125/hour and tracked/logged in the weekly report
 - b) Professional facilitator will be billed at \$250/hour while facilitating
 - c) For Billing Purposes, the “Work Week” will be Saturday – Friday
 - d) Invoice for two weeks will be remitted Wednesday after 2nd Work Week
 - e) Task work is expected to be about 300 hours – Town will only be invoiced for actual hours.

- 4) **TERM:** The work will begin shortly after execution of the Agreement and Task Order and will be completed during current 2022 Budget Year.
- 5) **ASSIGNED RESOURCES:** The COMPANY will designate Michelle Berger as lead and professional facilitator for this Task Order. Additional COMPANY resources will participate as needed to complete required tasks.

IN WITNESS WHEREOF, the parties hereto have caused this Task Order to be executed by their duly authorized representatives as of the date first above written.

TOWN OF KENNETH CITY

IMAGINE THAT PERFORMANCE, LLC

By: _____

By: _____

EXHIBIT G: INTERIM TOWN CLERK

This Task Order is pursuant to the Agreement for Services (the “Agreement”) dated 8th day of June 2022, by and between the TOWN and COMPANY, to provide the scope of services in the manner set forth herein:

- 1) **PROJECT DESCRIPTION:** The TOWN desires the COMPANY to provide those services generally described herein as: Interim Town Clerk
- 2) **SCOPE OF SERVICES:** COMPANY, through its identified staff, agrees to provide the following services:

Essential Duties

- a) Give notice of council meetings to its members and the public
- b) Attend all council meetings and keep a journal of the proceedings which shall be a public record
- c) Be the custodian of all the records, documents and papers of the town
- d) Be custodian of the official seal of the town, and authorize to affix the same to such instruments of writing as is necessary
- e) Attest all documents, contracts and agreements to which the town is a party as required by law
- f) Administer oaths as necessary
- g) Record and respond to public records requests
- h) Arrange for and supervise all town elections
- i) Prepare the agenda for all council meetings and post such agenda on the approved bulletin boards at least forty-eight (48) hours prior to each of said meetings
- j) Keep properly indexed books in which shall be recorded, in full, all ordinances and resolutions passed by the council. Ordinances shall be periodically codified. The clerk shall also keep the Town Charter in current form and shall enter all Charter amendments. Be responsible for the records retention program in accordance with state regulations and to destroy such records as authorized by the Florida Division of Archives History and Records Management.

Work Schedule

- a) Onsite for all public meetings and as directed by Interim Town Manager
 - i) Upcoming schedule will be included in Weekly Reports
 - ii) Length of onsite time will vary according to need
- b) All other tasks to be completed virtually

The Task Work is expected to be 10-20 hours per week. The week before Council Meeting(s) and week of Council Meeting(s) have time consuming tasks (Agenda Preparation and Attend Council Meeting).

- 3) **FINANCIAL MATTERS:** TOWN shall compensate COMPANY for services on a bi-weekly basis pursuant to the Agreement and the following:
 - a) Hours will be billed at \$90/hour and tracked/logged in the weekly report

- b) For Billing Purposes, the “Work Week” will be Saturday – Friday
- c) Invoice for two weeks will be remitted Wednesday after 2nd Work Week.

- 4) **TERM:** The Transition will begin shortly after execution of the Agreement and Task Order. Upon separation of Town Clerk, the Interim Town Clerk will be sworn in.
- 5) **ASSIGNED RESOURCES:** The COMPANY will designate Jocilyn Martinez as lead for this Task Order upon separation date of the current Town Clerk. Additional COMPANY resources will participate as needed to complete required tasks.

IN WITNESS WHEREOF, the parties hereto have caused this Task Order to be executed by their duly authorized representatives as of the date first above written.

TOWN OF KENNETH CITY

IMAGINE THAT PERFORMANCE, LLC

By: _____

By: _____

From: [Randy Mora](#)
To: [Robert Howell](#); [Megan Zemaitis](#); [Bonnie Noble](#); [Kyle Cummings](#); [Barbara Roberts](#)
Cc: [Peter Cavalli](#); [Ana Cabezas](#)
Subject: Kenneth City | DRAFT RFP for Attorney Services
Date: Friday, June 3, 2022 2:42:26 PM
Attachments: [image001.png](#)
[2020-11 KC Retainer Agreement.pdf](#)
[DRAFT KC TOWN ATTORNEY RFP.pdf](#)

CAUTION: This email originated from outside of the organization. Please DO NOT CLICK links or open attachments unless you recognize the sender and know the content is safe.

All,

In follow up to my message from April 29 (below), attached here is a DRAFT RFP for legal services. This will be on the agenda for the June 8 meeting to ensure you have an opportunity to provide input *before* the RFP is published. Because this is a draft, some portions are still bracketed/highlighted to be resolved before finalization.

As context, though I was not employed by Trask Daigneault LLP (formerly Frazer Hubbard Brandt Trask Yacavone Daigneault & Metz) at the time, our Firm became counsel upon the prompt resignation of the Town Attorney John Elias (around 2012). Upon Attorney Elias' resignation, the Town engaged the League of Cities' services to identify an interim Town Attorney. Through the efforts of the Town and the League, our Firm was identified as capable and willing to immediately step in to assist on an interim basis. After a period of time serving as interim Town Attorney, the Firm (through Jay Daigneault) and the Town entered into a two-year agreement for legal services in August 2012. In August 2014, Mr. Daigneault proposed the Town continue its established relationship with our Firm, but name me as the Town Attorney, which the Town Council approved. I have been the Town Attorney since August 2014. The Firm's contractual agreement has, with limited revisions, been extended by the Town Council in a series of multi-year agreements since 2012.

This RFP will allow the Town to competitively bid for legal services while still engaged in the budgeting process.

Respectfully,

Randy D. Mora

From: Randy Mora
Sent: Friday, April 29, 2022 1:33 PM
To: Robert Howell <howellr@kennethcityfl.org>; cummingsk@kennethcityfl.org;
nobleb@kennethcityfl.org; zemaitism@kennethcityfl.org; robertsb@kennethcityfl.org
Cc: Peter Cavalli <CavalliP@Kennethcityfl.org>; Ana Cabezas <cabezas@Kennethcityfl.org>; Mike Vieno <vienom@Kennethcityfl.org>
Subject: Kenneth City | RFP for Attorney Services

All,

In follow up to my brief phone calls with each of you, this e-mail is intended to formally document my request that the Town publish an RFP for legal services, as soon as practicable, with the understanding I do not personally intend to re-apply through this process.

My current contract (attached here) will expire in November of this year. As stated in my separate discussions with each of you and in the e-mail thread below, moving this matter forward in the near term will allow the Town to accurately budget for the contract costs of legal services while also fulfilling the stated objective of the Council to engage in a circumspect review of the Town's various contracts for professional services. Indeed, had I re-applied or renegotiated with the Town, the costs for legal services were likely to substantially increase commensurate with my Firm's rates in other communities and the demand for services within the Town. The need for accurate budget figures is especially critical as this community balances its budgeting aims against the resources it intends to allocate towards acquiring and compensating your next manager, and any other positions it endeavors to fill.

Moreover, upon much reflection, I am keenly aware that I have been a consistent presence through the various changes and challenges your community has experienced over these past eight years. I sincerely believe that in each instance I have faithfully discharged my duties to the Town, providing an informed and objectively neutral analysis for the Town's consideration. Regardless, going forward, I believe the Town and its Council would be best-served with a new personality and fresh perspective on the delivery of legal services to the Town and its officials.

For the sake of clarity and avoidance of doubt, I fully intend to diligently discharge my obligations as a charter officer to the Town until such time as the RFP process is complete or the Town Council takes action to the contrary. I have spoken with the Town Manager and am working to produce materials and provide insights that may be used to publish the contemplated RFP. The Town Council will, of course, have an opportunity to substantively craft the solicitation documents before they are published, just as it did through the 2021 recruiting process for the managers and clerk.

It has been and continues to be my pleasure to serve the Town of Kenneth City's elected officials and administration while working to preserve the public trust.

Respectfully,

Randy D. Mora, Esq., B.C.S.



Trask Daigneault, LLP
Harbor Oaks Professional Center
1001 South Fort Harrison Avenue, Suite 201
Clearwater, Florida 33756
Phone: (727) 733-0494

Fax: (727) 733-2991

Email: randy@cityattorneys.legal

CONFIDENTIALITY, DISCLOSURE, AND WIRING INSTRUCTION NOTICES

Confidentiality and Disclosure Notices. The information and all attachments contained in this electronic communication are legally privileged and confidential information, subject to the attorney-client privilege and intended only for the use of the intended recipients. If the reader of this message is not an intended recipient, you are hereby notified that any review, use, dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us immediately of the error by return e-mail and please permanently remove any copies of this message from your system and do not retain any copies, whether in electronic or physical form or otherwise. Additionally, the information contained herein may become subject to disclosure as a public record under Chapter 119, Fla. Stat.

Wiring Instruction Notice. **FURTHER, WE DO NOT ACCEPT OR REQUEST CHANGES TO WIRING INSTRUCTIONS VIA EMAIL OR FACSIMILE, PLEASE CALL TO VERIFY. IF YOU RECEIVE AN EMAIL CONTAINING WIRE TRANSFER INSTRUCTIONS, CALL OUR OFFICE IMMEDIATELY TO VERIFY THE INFORMATION PRIOR TO SENDING FUNDS.**

From: Randy Mora

Sent: Monday, April 18, 2022 9:52 PM

To: Peter Cavalli <CavalliP@Kennethcityfl.org>

Cc: Ana Cabezas <cabezasa@Kennethcityfl.org>

Subject: RE: Kenneth City | RFP for Attorney Services

Manager Cavalli,

In follow up to the action item list below, as well as our brief conversations on Thursday afternoon and earlier today, I respectfully request that the Town publish a request for proposals for attorney services in the near future.

Getting the contract out to bid in the near future, as opposed to closer to the end of the contract term in November, will allow the Town to address the Town Council's expressed concerns about the competitiveness of contracts that have not been put to the marketplace recently, while also allowing the Town administration to responsibly craft a budget in the summer months based on immutable figures.

I appreciate your attention to this matter, and am prepared to assist in providing you with assistance through this process.

Respectfully,

Randy D. Mora, Esq., B.C.S.

From: Randy Mora

Sent: Monday, February 14, 2022 5:01 PM

To: Peter Cavalli <CavalliP@Kennethcityfl.org>; Ana Cabezas <cabezasa@Kennethcityfl.org>

Cc: Jeremy Simon <Jeremy@cityattorneys.legal>; Robert Eschenfelder <Rob@cityattorneys.legal>;

Erica Augello <Erica@cityattorneys.legal>

Subject: Kenneth City | Attorney Action Item Review & Charter Officer Meeting Request

Pete & Ana,

Roughly 45 days into the calendar year, I think it prudent to take stock of the various issues we are handling and their progress. There may be value in speaking next week re: the prioritization of these various matters. Otherwise, please advise if I have misapprehended or mischaracterized any of the issues below.

CONTRACTS & PROCUREMENT

• Raised by Management

- **Solid Waste** (*Published Feb. 23, 2022 – Anticipated award date of April 13, 2022*)
 - Current extension set to expire at conclusion of month, extension needed from Waste Connection (ref: discussion with I. Boyle)
 - **Status** – RDM awaiting input re: Cavalli calls with I. Boyle on Feb 12 or 13 for Waste Connection extension and desired process going forward for pending RFP
- **Special Magistrate** (*Published Feb. 8, 2022 – Anticipated award date of March 9?, 2022*)
 - **Status** – Awaiting RFP responses from individual applicants, R. Eschenfelder (“RME”) assisting with questions from Manager; Cavalli considering potentially extending RFP response timeline, RME/RDM to assist with any related RFP addenda
- **Chief of Police**
 - Employment Agreement (*In Progress*) – **Status** RDM awaiting draft agreement from Manager Cavalli
 - MOU for use with PBA (*In Progress*) – **Status** RDM to circulate final draft by **February 15, 2022**
- **Accela Citizen Portal**
 - **Status** – Town Council approved management to negotiate and contract with Accela re: \$60,000 contract; RDM awaiting procurement details for acquisition and proposed contract terms from Cavalli

• Misc Contracts

- **Accountant** – (*Original contract entered into March 31, 2021 – Automatic Renewal Next Month*)
 - “Services will begin as of 3/31/21 and automatically renew annually with a starting monthly contract amount of \$5,6000 with an annual increase allotment of 3%”
 - **Status** – No action needed, absent contrary direction from Management to renegotiate or otherwise go out to bid
- **Attorney** (*Two Year Term Expires November 2022*)
 - **Status** – RDM to circulate proposed renewal for potential adoption in summer, absent contrary direction from Management to go out to bid
- **Advanced Engineering & Design, Inc.** – (*Original contract may require review, based on previous management input*)
 - **Status** – No urgent action needed, absent contrary direction from Management to renegotiate or otherwise go out to bid
- **BCR Computer Systems** – (*Original contract may require review, based on previous management input*)
 - **Status** – No urgent action needed, absent contrary direction from Management to renegotiate or otherwise go out to bid
- **Interlocal Agreement with Pinellas Park for Building Official Services** (*Original contract may*

require review, based on previous management input)

- Last known contract I can find is from 2012, which expired in December 2017, and e-mails concerning a proposed draft for renewal that was circulated in October 2017, contemplating a December 2022 termination.
- **Status** – Secure through Town records final/executed copy of interlocal agreement and determine if it in fact expires on December 11, 2022, as contemplated in the draft. No urgent action needed, absent contrary direction from **Management** to renegotiate or otherwise go out to bid

CODE ENFORCEMENT

- **Status**
 - RFP for Special Magistrate pending (see above)
 - **Erica Augello (EFA)** Assisting with reestablishment of process for directing violations for prosecution to LOV court or special magistrate, as appropriate

LEGISLATIVE MATTERS

- **(PRIORITY) Election Resolution** – For use in March 2022 meeting
 - **Status** – **RDM** to prepare resolution and circulate by Feb 21 re: uncontested election
- **Comprehensive Plan Review/Revision (EAR Based Amendments, FLUE, FLUM, etc.)**
 - **Status** – **Cavalli** working with **NR at Forward Pinellas** re: proposed terms for interlocal agreement/services, pending further review by **RDM**
- **Charter Review - Description:** There is no set schedule for reviewing the Town’s Charter. Section 9.04 provides that the Town Council shall appoint a committee for the purpose of reviewing the Charter and ordinances and submitting recommendations to the Town Council for any proposed amendments or revisions of the charter and ordinance. The Charter suggests this committee “may be appointed at least once every five years after the adoption of this charter,” and the committee would continue in existence for a period not to exceed one year from the effective date of the appointment. If the Town Council cannot appoint 5 members, the council can itself serve as the Charter/Ordinance review body.
 - **Status:** To my knowledge, the Town has not convened a Charter Review Committee since the Charter’s adoption in early 2014. No urgent action needed, but **Management** may wish to consider establishing a timeline for a Charter review.
- **Code Revision** – Cavalli authorized ongoing code revision
 - **Status** – **RDM** requests meeting with Cavalli to discuss particular code sections to be amended (e.g. Sign Code (submitted 2017), Chapter 2 – Administration (submitted Feb 2019), Chp. 66 (Revision necessary to align to Chp 54), Home Occupation, etc.)
- **Personnel Manual** - On November 7 my office circulated a proposed revised draft of the personnel manual (E-mail attached for reference). Once finalized we will need to adopt an ordinance repealing the personnel manual from the LDC (two readings), and the resolution adopting the proposed new personnel manual (1 reading).
 - **Status** – **Cavalli and Cabezas** in ongoing reviews of circulated draft, results to be circulated to **RME and RDM**
- **Resolution No. 12-12** - Ken (Public Works) has indicated the fees set forth in the above-referenced resolution governing bulk pick-up need to be revised
 - **Status** – No action needed; Revision on hold pending terms of Solid Waste RFP

QUASI-JUDICIAL MATTERS

• Board of Adjustment & P&Z

- RDM to perform instruction on Wednesday, Feb. 16, 2022
- *Status* – Hearings to be scheduled on pending applications following Feb 16, 2022 training, based on *Management* understanding of present pending status
 - RDM believes application pending
 - (Variance) James Knoebel – 5701 44th Avenue
 - (Variance/Setback Issue) Paul Taylor – 5695 46th Avenue N (need to confirm if paid fee)
 - (Annexation) Rebos Club – 5639 54th Avenue N (need to confirm if paid fee)
 - RDM believes abandoned, seeking refund
 - Idir Rexha – 6333 43rd Avenue, Kenneth City (paid \$400)
 - Jason Ramsey – 5600 46th Avenue N., Kenneth City (paid \$400)

-

Misc. Administrative Matters

- **Financial Analysis** – B. Inzer provided preliminary report in Dec. 2021. Contemplated receipt of reconciled financials for 2021 and audit.
 - *Status/Suggestion* – RDM advises to transmit most current available financial data with commitment to follow-up once audit available in coming months

**AGREEMENT BETWEEN THE TOWN OF KENNETH CITY AND
TRASK DAIGNEAULT, LLP, FOR TOWN ATTORNEY SERVICES**

THIS AGREEMENT is entered into this 18 day of November, 2020, between the Town of Kenneth City ("TOWN") and Trask Daigneault, LLP (the "FIRM"). In consideration of the mutual promises and covenants set forth in this agreement, the parties agree as follows:

1. **FIRM AND ATTORNEY RETAINED.** The TOWN retains the FIRM to perform all the services of the Town Attorney as set forth in the Charter and Ordinances of the TOWN and in this Agreement. RANDY D. MORA, ESQ., of the FIRM, shall be the appointed Town Attorney for purposes of Article IV, Section 4.03 of the Town Charter.

2. **RETAINER SERVICES AND APPLICABLE RATE.** The FIRM shall be paid an annual retainer of \$43,500.00, payable in twelve (12) equal monthly installments (\$3,625/mo), to perform the general work of the Town Attorney. Except as provided in the next paragraph, the general work of the Town Attorney shall include all duties of the Town Attorney including, but not limited to, attending meetings of the Town Council, handling all inquiries from the Town Council and Town staff, conducting necessary research, preparing opinions, reviewing and drafting ordinances, resolutions and contracts, preparing development agreements, and processing administrative fine or lien settlement requests. It is the intent of this agreement that all services performed by the FIRM for the TOWN as the Town Attorney shall be compensated by the retainer except for those services set forth in paragraph 3 of this agreement.

3. **MATTERS BILLABLE SEPARATELY AND NOT INCLUDED WITHIN RETAINER.**

a. For the following services, which are separate and distinct from the services performed under the retainer, the FIRM shall be compensated at the rate of \$175 per hour for attorney services for the first year of this Agreement. During the second year of this Agreement, the FIRM shall be compensated at the rate of \$185 per hour for attorney services. The FIRM shall be compensated \$85 per hour for paralegal services for the entire duration of this Agreement:

i. **Litigation services.** Litigation services are defined as the representation of the TOWN or TOWN employees or boards in any mediation, arbitration, administrative, civil, criminal, code enforcement, judicial or quasi-judicial proceeding (excluding quasi-judicial proceedings conducted by the Town Council). Litigation services include any pre-suit investigation, mediation, or arbitration and time expended in an effort to avoid litigation.

ii. **Appointed, Advisory, and Specially Convened Boards or Committees.** Legal services provided to and in support of the Board of Adjustment and Appeals, Local Planning Agency, and any other appointed, advisory or specially-convened boards of the TOWN shall be billed separately, as outside the scope of the retainer. Attendance at meetings of the Town Council and necessary legal services in support of the Town Council are included in the retainer.

iii. **Real estate services.**

- iv. Collective bargaining negotiations and dispute resolution.
- v. Special projects, development agreements or special ordinances. A special project, development agreement or special ordinance is a complex and complicated matter requiring extensive time, involvement, research, preparation and review by the FIRM. Special projects, development agreements or special ordinances must be approved by the Town Manager.
- vi. Bond and bank loan opinions. Bond and bank loan opinions are not considered services to be performed under the retainer and shall be billed separately on a set fee basis based on the size of the loan or bond issuance.
- vii. Processing administrative fine or lien settlements, including civil asset forfeiture proceedings and work performed in support thereof.

4. **COMPENSABLE COSTS.** The TOWN shall pay all costs incurred or advanced by the FIRM in representing the TOWN pursuant to this Agreement. Such costs include, but are not limited to, court filing fees, deposition charges, photocopying charges, long distance telephone charges, postage, Federal Express charges, out-of-county travel charges, computer research fees, and other out-of-pocket costs.

5. **DESIGNATED ATTORNEY.** Though RANDY D. MORA, ESQ., shall be designated the appointed TOWN ATTORNEY, the FIRM, in its sole and exclusive discretion, may use the services of any other attorneys and paralegals employed by the FIRM in providing legal services under this Agreement.

6. **OUTSIDE COUNSEL.** The TOWN understands that there may be legal matters, including matters which would otherwise be covered under the retainer, which are beyond the expertise of the FIRM and that it is in the best interest of the TOWN that such matters be handled by an attorney with the appropriate expertise and qualifications. If there is any legal matter, including matters which would otherwise be included under the retainer, which the FIRM believes is outside its expertise, the FIRM may refer that matter to an attorney with specialized expertise in the appropriate area of the law after consulting with the TOWN, and the TOWN shall be responsible for compensating such attorney for his or her fees and costs.

7. **PROMPT PAYMENT.** The FIRM will bill the TOWN on a monthly basis for all legal fees under this Agreement, and the TOWN shall pay these invoices in accordance with the Prompt Payment Act. Payment shall be due on the first of the month. For example, the monthly retainer for the month of January shall be due on January 1st of each year.

8. **CONTRACT TERMINATION.** This Agreement is terminable by either party without cause on thirty (30) days written notice to the other party as set forth in this Notice section of this Agreement.

9. **POST-TERMINATION COMPENSATION.** In the event the Town Council votes to terminate the FIRM'S services under this Agreement at any time, the FIRM shall be entitled to be compensated according to the terms of this Agreement for all services rendered during the thirty day notice period. Thereafter, the FIRM shall be compensated for any continued legal services at the hourly rate of \$225.00

per hour for attorney services and \$95.00 per hour for paralegal services, plus out-of-pocket costs, for any continued legal representation of TOWN, including retainer services.

10. **NOTICE.** All notices and communications required under this Agreement shall be in writing and shall be deemed to have been duly given when delivered personally, or by registered or certified mail to the following persons:

For the Town: Town Manager, Town of Kenneth City
Town Hall
6000 54th Avenue North
Kenneth City, FL 33709

For the Firm: Jay Daigneault, Esq.
Trask Daigneault, LLP
1001 South Fort Harrison Avenue, Suite 201
Clearwater, FL 33756

Either party may change the person or address to which notices and other communications are to be sent by giving written notice of the change in the manner specified in this paragraph.

11. **EFFECTIVE DATE.** This Agreement shall be effective for a period of two (2) years from the date set forth in the introductory paragraph.

The parties have caused this Agreement to be executed on the date set forth in the introductory paragraph.

TOWN OF KENNETH CITY

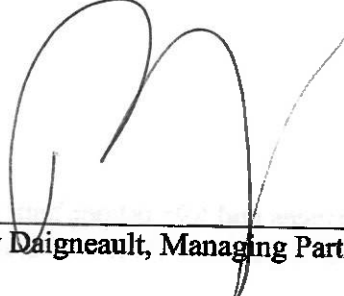
By: Wanda L. Dudley
Mayor

Matthew Campbell
Town Manager

Attest: Cindy M. Mateso
Town Clerk

TRASK DAIGNEAULT, LLP

[Signature]



Jay Daigneault, Managing Partner

**NOTICE OF
REQUEST FOR PROPOSAL
RFP #2022-03
TO PROVIDE LEGAL SERVICES (TOWN ATTORNEY)
FOR THE TOWN OF KENNETH CITY, FLORIDA**

The Town of Kenneth City, Florida, (hereinafter referred to as the "Town"), invites Legal Services Providers to submit a written proposal to provide the Town with legal services (Town Attorney) in connection with its regular governing and operating activities. Proposals are solicited in accordance with the terms, conditions, and instructions as set forth in this Request for Proposals ("RFP").

Proposals will be received by the Town of Kenneth City, Florida, by U.S. Postal Mail or hand delivery to the Town Clerk's Office, Town Hall, 4600 58th Street North, Kenneth City, Florida 33709 until Wednesday, July 6, 2022 at 2:00 p.m. Sealed proposals must be submitted marked: SEALED PROPOSAL – TOWN OF KENNETH CITY – RFP #2022-03: LEGAL SERVICES (Town Attorney), July 6, 2022. The Town's purchasing policy shall govern whether a proposal will be accepted after the stated deadline.

The RFP #2022-03 document may be obtained from the Town Hall, 6000 54th Avenue North, Kenneth City, Florida 33709, phone (727) 498-8948, from the [Town Clerk at town57@kennethcityfl.org or Demandstar]. Questions concerning the RFP #2022-03 should be submitted in writing either by e-mail to Pete Cavalli, Town Manager, Town of Kenneth City at cavallip@kennethcityfl.org no later than, Wednesday, June 22, 2022.

SECTION I **OVERVIEW**

The Town of Kenneth City, Florida, is requesting proposals from independent legal service providers licensed to practice law in the State of Florida to perform the legal services described herein.

The Town Council seeks a Town Attorney who is an exceptional communicator with proven local government experience and an exceptional understanding of the council-manager form of government. The ideal Candidate will professionally manage the duties and responsibilities of the office, and promptly provide accurate information to the Town Council and Town Staff.

The chosen candidate will possess exceptional interpersonal skills, composure, organizational skills, a collaborative work philosophy, and the ability to work with a variety of diverse groups and issues.

The Town Attorney should be skilled at building and maintaining positive working relationships with internal and external stakeholders and have the ability to be politically savvy while remaining politically neutral. The Town Attorney should have the skills and experience or the practice staff necessary to manage most municipal government legal matters, but also know when it is necessary to seek the assistance of outside counsel.

The chosen candidate/principal assigned to the Town will hold a Juris Doctor from an accredited school of law and be licensed to practice law in the State of Florida. Florida local government experience is required.

The Town is presently transitioning leadership and the Council is establishing its policy goals and appropriations for the coming fiscal year.

SECTION II
SCOPE OF REQUESTED SERVICES

A. GENERALLY

The Town of Kenneth City, which incorporated in 1957 is a small municipality located in southern Pinellas County. The Town us approximately .75 miles square and has a population around 5,000 residents. In 2013, the Town amended its Charter and transitioned to a Council-Manager form of Government. The Town maintains its own Police Department and Public Works Department. The Town Attorney reports to and serves at the pleasure of the Town Council, which has four members, each elected to two-year terms, and a mayor elected to a three-year term. Given the Town's small size and limited personnel, the Town Attorney works very closely with the Town Manager, Town Clerk, and department heads.

In addition to the Town Council and the Town's administrative personnel, the Town maintains a Board of Adjustment and a Planning and Zoning Board. The Town has retained the services of a special magistrate for the purpose of conducting code enforcement hearings. The Town's Charter also contemplates the formation of a charter review board, though no such board has convened since 2012.

The Town is seeking proposals from attorneys or firms qualified to provide Town Attorney related services encompassing comprehensive legal representation for the Town of Kenneth City, Town Councilmembers, Charter Officials, Executive Staff, and the Town's subordinate boards. More detailed information on the Town government and the services that it provides can be found at the Town's website: www.kennethcityfl.org.

B. TOWN'S GOVERNING DOCUMENTS

The Town Charter states the following concerning the Town Attorney:

The town council shall appoint an officer of the town who shall have the title of town attorney who shall serve at the pleasure of the council. The compensation of the town attorney shall be fixed by the council. The town attorney shall advise the town council in all legal matters and shall perform any other duties prescribed by the Charter or by general law or the mayor and council. S/He shall be a lawyer admitted to practice before all courts of the State of Florida and the appropriate Federal District Court. Such attorney may or may not be a resident of the town.

C. CONTRACT TERM

The Town intends to contract with one (1) qualified firm to serve as the Town Attorney of record. The initial term will be for a period of three (3) years. The contract can be renewed without the need for competitive solicitation or negotiation upon written agreement of the parties.

D. SCOPE OF SERVICES

The "basic services" required in this Request for Proposals ("RFP") include:

1. The function involves primary responsibility for performing legal research, preparing opinions, advising Town officials, and, when necessary, conducting complex civil suits.

2. The Town Attorney plans, coordinates and directs the legal activities of the Town. Work duties require close coordination with the Town Council, officials from other governmental units, and the Town Manager.
3. The Town Attorney shall serve as chief advisor to the Town Council, Town Manager, and all Town departments.
4. The Town Attorney shall facilitate the orderly and legally sufficient procedural conduct of public meetings and proceedings.
5. The Town Attorney shall represent the Town in all legal matters, including the bringing and defending of suits.
6. Attends all meetings and workshops of the Council and other committees and boards of the Council as required. For reference, the Town Council's regular meetings are held at 6:30 pm on the second Wednesday of each month. Meetings last approximately one (1) hour to four (4) hours. The Town Council occasionally holds Work Sessions on another Wednesday in the month. In addition, the Town Attorney is expected to attend Special Meetings, workshops and budget meetings as called and scheduled.
7. Advises the Council and Town Officials in reference to legal questions; provides staff assistance, legal research and counseling.
8. Drafts contracts, resolutions, ordinances and development agreements at the request of the Town Council or the Town Manager.
9. The Town Attorney shall review and approve all contracts, resolutions, and ordinances generated by Town staff prior to consideration by the Town Council.
10. Acts as co-counsel in complaints, suits or controversies for the Town if a special counsel or insurance defense counsel is employed.
11. The Town Attorney shall represent the Town by presenting cases before the Code Enforcement Board or Special Magistrate.
12. The Town Attorney, at the request and direction of the Town Council or Town Manager, may conduct investigations, compel appearances, and make reports.
13. Prosecute on behalf of and otherwise defend the Town on all complaints, suits or controversies in which the Town is a party, absent an agreement with a third party to the contrary. The Town Attorney is responsible for prosecuting and defending the Town in civil action when no counsel is provided by liability insurance or when the Town's exposure exceeds its insurance coverage. The Town Attorney is responsible for representing an employee or elected official of the Town when named in a suit as a result of their official duties.
14. Keep the Town Council informed of legislation or judicial opinions that have potential impact to the Town by way of memorandum, including regular updates on Florida Legislative Session bills of concern and any recommended courses of action on the part of the Town
15. The Town Attorney shall answer all Town Council and Charter Official initiated requests for information and advice in a timely fashion. The foregoing shall not be construed to mean the Town Attorney must initiate lengthy work requests at the behest of a single Councilmember.

By submission of a proposal, the proposer certifies that he/she has full knowledge of the scope, nature, quantity and quality of work to be performed, the minimum requirements of the Town and the conditions under which the work is to be performed.

E. QUALIFICATIONS

The Town Attorney shall meet the following qualifications criteria:

1. Graduate from an accredited law school in the United States of America.
2. Must be a member in good standing of the Florida Bar and admitted to practice in all Courts of the State of Florida for at least five (5) years.
3. The attorney(s) representing the Town shall be located in in Pinellas, Hillsborough, Pasco, Polk, Hernando or Manatee County on a full-time basis.
4. Experience in the practice of city, county, or local government law.

Preference may be given to candidates certified by the Florida Bar in City, County and Local Government law.

F. SCHEDULE

The anticipated project schedule, which is subject to change, is

- RFP Advertised June 10, 2022
- Questions to Town Manager June 22, 2022
- Proposals Due to the Town July 6, 2022 at 2:00 pm.
- Council Discussion July 13, 2022 at 6:30 p.m.
- Contract Start Date TBD

SECTION III **GENERAL CONDITIONS**

Respondents are required to submit their proposals upon the conditions expressed in these instructions.

A. RESPONDENT'S ABILITY

It is the intent of the Town to award the contract for this work to a Respondent whose experience, skill, and financial resources are fully equal to the task of providing the required professional services. Upon request by the Town, any Respondent shall be prepared to submit an attested statement of his ability, financial status, and history.

B. PROPOSAL GUARANTEE

Decision on the acceptance or rejection of the various proposals will be made as soon as practicable after proposals are received.

C. BASIS UPON WHICH PROPOSALS ARE SOLICITED AND AWARDED

Proposals are solicited on the basis of the evaluation criteria set forth in the RFP documents. Award of the Contract will be completed in accordance with the terms of this RFP.

D. ASSIGNMENT OF CONTRACT

The act of submitting a proposal in response to this RFP shall constitute an agreement that no assignment of any resulting Contract shall be made without the written consent of the Town.

E. CANCELLATION OF CONTRACT

The Town reserves the right to terminate the Contract under the terms of this RFP and any terms negotiated in any Contract.

F. PREPARATION OF PROPOSALS

The Respondent's proposal shall be submitted as required by the RFP documents in accordance with these instructions. Completeness and attention to detail are factors in the evaluation of the proposals.

G. REJECTION OF PROPOSALS

The Town reserves the right to reject any proposal that it deems to be non-responsive to the requirements of the specifications.

The judgment of the Town shall be final in determining the capability, experience, and ability of the Respondent to successfully provide the required professional services. Failure to convince the Town of such capacities shall result in the rejection of the response.

The Town reserves the right to reject any or all responses and to waive any irregularity, variance or informality whether technical or substantial in nature, and to accept or reject any item or combination of items, in keeping with the best interests of the Town.

H. COSTS INCURRED BY RESPONDENT

All expenses involved with the preparation and submission of proposals to the Town, or any work performed in connection therewith, shall be borne solely by the Respondent(s). No payment will be made for any responses received, or for any other effort required of, or made by, the Respondent prior to Contract commencement.

I. INQUIRIES AND ADDENDA

Each Respondent shall examine the RFP documents. Any inquiries, suggestions, or requests concerning interpretation, clarification, or additional information pertaining to this RFP shall be made by Wednesday, June 22, 2022, through Pete Cavalli, Town Manager, Town of Kenneth City at cavallip@kennethcityfl.org.

The Town shall not be responsible for oral interpretations given by any Town employee, representative, or others. The issuance of a written addendum is the only official method whereby interpretation, clarification, or additional information can be given. If any addenda are issued to this RFP, the Town will attempt to notify all prospective Respondents who have requested a copy of the RFP. However, it shall be the responsibility of each Respondent, prior to submitting a response, to contact the Town Manager to determine if addenda were issued and to make such addenda a part of the response

J. INSURANCE REQUIREMENTS

The Candidate shall maintain in effect during the term of any Contract in connection with this RFP, and all extensions and amendments thereof, certain insurance coverage as set forth below, and shall furnish certificates of insurance, in duplicate form, before beginning its performance under this Contract. All policies except Professional Liability and Worker's Compensation must name the Town as an additional insured. All liability policies must be issued by a Company with a Certificate of Authority from the Florida Financial Services Council, Office of Insurance Regulation to conduct insurance business in Florida or a rating of at least B+ and a financial size of Class VI or better according to the current year's Best's Key Rating Guide, Property-Casualty United States. The Candidate shall maintain the following insurance coverage in the following amounts:

- Worker's Compensation including Broad Form All States Endorsement Statutory amount.
- Professional Liability: \$1,000,000 per occurrence; \$2,000,000 aggregate.

K. NO LOBBYING/NO CONTACT

Contact regarding this proposal with any individual, Town Council Member, or employee of the Town with the sole exception being [Peter Cavalli, Town Manager or Ana Cabezas, Town Clerk], will be grounds for disqualification of the Candidate at the option of the Town Council.

This limitation is in effect from the date of the publication of this RFP until a contract is recommended by the Town Council. The Candidate may respond to questions initiated by a Town Council Member once the contract is placed on the Town Council agenda.

L. PUBLIC ENTITY CRIMES

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Florida Statutes 287.017 for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list

M. NO COLLUSION

By offering a submission to the RFP, the proposer certifies the proposer has not divulged to, discussed or compared his/her competitive proposal with other proposers and has not colluded with any other proposer or parties to this competitive proposal whatsoever.

N. WITHDRAWAL OF PROPOSALS

A party responding to this RFP may withdraw their proposal at any time prior to the opening of the proposals. Any late request for withdrawal will not be considered.

Requests to withdraw must be made in writing to the Town Clerk.

O. GOVERNING LAWS

Any contract(s) resulting from this RFP shall be governed by the Laws and Regulations of the State of Florida and the Town of Kenneth City. Venue shall be in Pinellas County, Florida.

P. CONFLICT OF INTEREST DISCLOSURE

Each proposer shall include a disclosure statement with their proposal specifying any potential conflict of interest, real or apparent, that the firm may have due to ownership, other clients, contracts, or interests associated with the Town of Kenneth City.

Q. REQUIREMENT TO COMPLY WITH PUBLIC RECORDS LAWS

The firm is required to comply with Section 119.0701, Florida Statutes. The firm shall keep and maintain public records required by the Town to perform the service.

Upon request from the Town's custodian of public records, the firm shall provide the Town 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 Chapter 119, Florida Statutes or as otherwise provided by law.

The firm shall ensure that the 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 firm does not transfer the records to the Town.

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

IF THE FIRM HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE FIRM'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS [(ANA CABEZAS)] AT:

(727) 498-8948;
VIA EMAIL AT [TOWN57@KENNETHCITYFL.ORG]; OR
AT 6000 54th Avenue, North, Kenneth City, Florida 33709

SECTION IV
RESPONSE SUBMISSION, RESPONSE FORMAT & EVALUATION CRITERIA

All parties interested in making a proposal to obtain this engagement must comply with the detailed instructions for submitting proposals.

A. SUBMISSION PROCEDURES

Seven (7) copies of the proposal (one for each member of the Town Council, plus the official file and staff), and one (1) complete copy in PDF format on a USB drive are to be submitted in a sealed envelope to:

Town of Kenneth City
Attn: [Insert Name]
6000 54th Avenue, North
Kenneth City, Florida 33709

To prevent a proposal from being prematurely opened or from being opened by unauthorized individuals, your proposal should be identified on the envelope or wrapper as follows:

SEALED PROPOSAL
TOWN OF KENNETH CITY – RFP 2022-03: Legal Services
July 6, 2022 at 2:00 p.m.

The deadline for submission of proposals is **July 6, 2022, at 2:00 p.m.** No modification or addenda will be accepted after the closing dates stated above unless, in the sole discretion of the Town Council, it is determined to be in the best interest of the Town to do so.

B. RESPONSE FORMAT

All proposals must be typewritten. Clarity and completeness are essential. The Proposal must be signed by the individual(s) legally authorized to bind the proposing Firm.

Proposals must be submitted in the format provided below, with each of the referenced sections addressed in full. Each of the sections described below must begin on a separate page, and each page must clearly state the name of the Proposer. Town reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially non-responsive to the requests for information contained herein.

1. TITLE PAGE

Show the RFP subject, name of firm, mailing address, telephone and fax number, name of the contact person, email address and date.

2. TABLE OF CONTENTS

Each proposal shall include a clear identification of the material by section and by page number.

3. LETTER OF UNDERSTANDING

State your understanding of work to be accomplished. Also, state the name of the person who will be authorized to make representations for the proposer, their title, address and phone, fax number(s) and email address. State that the person signing the letter has been authorized to bind the proposer. The response must be signed by a duly authorized officer or agent of the firm. Such officer or agent must present legal evidence that they have lawful authority to sign said proposal and that the signature is binding upon the firm. Include a statement that the proposal is a firm and irrevocable offer for the engagement period.

Identify the principal and any secondary representatives providing the legal services to the Town and acting as backup in case of absence. Provide name, title, addresses and telephone numbers.

The letter of understanding shall include the conflict of interest disclosure referenced in Section III.P., above.

4. CANDIDATE'S INFORMATION & CERTIFICATION

This Section should include the type-written and completed Candidate's Information Form enclosed with this RFP.

5. FIRM'S QUALIFICATIONS AND EXPERIENCE

This section should include a brief history of the firm emphasizing the firm's qualifications in general and specifically for this project. State whether your firm is local, national or international in size. Give the location of the office from which the work is to be completed. State the size of staff, number of professional staff and over-all experience of assigned staff for this project.

6. PROPOSED ATTORNEY'S QUALIFICATIONS & EXPERIENCE

Submit a statement of qualifications and experience, including a resume, for each attorney that will provide legal services under the proposed contract.

Resumes should include the following information as a minimum:

- i. Formal education.
- ii. Supplemental education relative to government.
- iii. Experience in municipal government: List other government entities with which the law firm now provides, or has provided, routine legal services and state in what capacity the services were provided (i.e. litigation, city attorney, etc.).

The RFP response should include certificates of good standing for all attorneys expected to provide legal services for the Town. List any pending ethics actions against any of the Firm's attorneys. Describe any probable cause findings, suspensions, reprimands, probations, disbarments or adverse actions against any member of your firm by the Florida Bar in the last ten years.

7. COST/FEE PROPOSAL

Include a cost/fee proposal with your response. Proposers are free to propose a primary and alternative proposals for cost/fee arrangements. In each version, all costs shall be included. At a minimum, please include the following and respond to each individually and in sequence:

- If applicable, the proposed monthly retainer rate. If the RFP response proposes a retainer, it should be made clear which services are to be included in the retainer, and the rate for any services rendered outside the scope of the retainer.
- The applicable hourly rate. If the applicable hourly rate is to vary by the personnel

utilized, each of the proposed rates should be clearly stated. If the applicable hourly rate is to vary by the practice area or task, each of the proposed rates should be clearly stated.

- Any proposed charges for travel shall be clearly stated
- All proposed reimbursement requirements (copies, calls, filing fees, etc. should be identified)
- Any additional information considered essential to the proposal may be included in this section

C. EVALUATION CRITERIA & FIRM SELECTION

The list of responsive firms will be forwarded to the Town Council. The Town Council will discuss the firms in an open and noticed public hearing, during which the Town Council will interview the responsive firms. The Town Council may require a presentation, or perform a background check. Individually, members of the Town Council may conduct an interview with the person proposed by the firm to be the Town Attorney. This is at the discretion of each Town Councilmember. The Town Council will make the final decision and appoint the Town Attorney.

Criteria used in determining a firm's qualifications include:

- A. Practical experience and knowledge of Municipal Corporate Law and Operations.
- B. Demonstrated Experience in representing Public Entities.
- C. Dedicated Time Commitment of the Primary Legal Representative.
- D. Ability to Communicate Effectively and Prepare Written Documents.
- E. Clarity and Responsiveness of Proposal.
- F. Fee Proposal

The Town reserves the right to exercise its discretion, to waive minor informalities in any response, to reject any or all responses with or without cause, or to accept the response that in its judgment will be in the best interest of the Town. Further, the Town, in its sole discretion, reserves the right to separately quote any project that is outside the scope of this solicitation, whether through size, complexity, or dollar value.

Negotiations may be conducted with the firm(s) whose proposal has been judged to best meet the needs of the Town. The Town reserves the right to request any additional information needed for clarification from any firm for evaluation purposes.

SECTION V
CANDIDATE'S INFORMATION

1. **Candidate Name:** _____
2. **Candidate's Law Firm:** _____
3. **Candidate's Mailing Address:** _____
4. **Candidate's Physical Address:** _____
5. **Candidate's Telephone No.:** _____
6. **Candidate's E-mail Address:** _____
7. **If a corporation, please provide the following**
 - Federal Tax I.D. Number
 - A list of the corporate officers (names, addresses)
8. **References:** Please provide a list of three (3) references of client organizations that the Candidate is currently representing or has represented. The Town may request information from these sources

Reference No. 1

- **Client Organization Name:** _____
- **Client Organization Address:** _____
- **Contact Reference's Name:** _____
- **Contact's Telephone Number:** _____
- **Contact's E-mail Address:** _____

Reference No. 2

- **Client Organization Name:** _____
- **Client Organization Address:** _____
- **Contact Reference's Name:** _____
- **Contact's Telephone Number:** _____
- **Contact's E-mail Address:** _____

Reference No. 3

- **Client Organization Name:** _____
- **Client Organization Address:** _____
- **Contact Reference's Name:** _____
- **Contact's Telephone Number:** _____
- **Contact's E-mail Address:** _____

CERTIFICATION

1. I/We understand, acknowledge and agree that the Town of Kenneth City shall not be responsible for reimbursement of any costs incurred in the preparation of this proposal.
2. I/We understand, acknowledge and agree that the Town Council may reject this proposal, in whole or in part, out-of-hand, for no reason, and that any such rejection will result in no obligation whatsoever on the part of the Town of Kenneth City or any of its employees and officials.
3. I/We understand, acknowledge and agree that the Town Council reserves the right to reject all proposals and to accept any offer received, whether or not the offer is the lowest price offer received.
4. I/We understand, acknowledge and agree that any contract awarded herein shall not entitle the successful proposer to perform work for the Town of Kenneth City on an exclusive basis.
5. I/We understand, acknowledge, and agree that the Town Council will require, as a condition of any contract awarded under this RFP, that the proposer shall provide proof of insurance in amounts acceptable to the Town. If selected for the award of a contract under this RFP, I/We agree to provide to the Town Council, proof of insurance in the form and amounts satisfactory to it.
6. I/We understand, acknowledge and agree that this RFP and the selected Firm's proposal may, by reference, become a part of any formal Contract the selected Candidate and the Town resulting from this solicitation.
7. I/We understand, acknowledge and agree that personnel essential to the continuity of any contract must be available throughout the duration of any contract that may be awarded hereunder unless substitutions are approved in writing by the Town Council.
8. I/We understand, acknowledge and agree that the Town Attorney shall provide legal services in accordance with this RFP, as they may be amended from time to time.
9. I/We understand, acknowledge and agree that the Town Council and/or Town Manager will be responsible for monitoring day-to-day services of the Candidate delivered to the Town. The Town Attorney shall promptly report any conditions, transactions occurrences, events, situations, or circumstances encountered by the Candidate, which would impede or impair the proper conduct of the legal services provided.
10. I/We understand, acknowledge and agree that all proposals submitted shall become public record upon the opening of the sealed envelope in which the Firm's proposal is submitted.
11. I/We understand, acknowledge, and agree that if selected, the Candidate will be required to keep complete and accurate books of accounts and records of its business and operations under and in connection with the contracted services. All such books of accounts and records shall be made available for inspection by designated Town persons or others as the Town might require.

Signature of Authorized Representative: _____

STATE OF FLORIDA

COUNTY OF PINELLAS

SWORN TO AND SUBSCRIBED before me, this _____ day of _____.

NOTARY PUBLIC: _____

SEAL

Kenneth City Police Department Stats

Month/ 2022	Service Summary					Arrests					Traffic					Crime Prevention & Outreach				
	Calls for service	Reports + Supplements	AOA	Alarm	SAO Referrals	APAD Arrests	Arrests / MTA	Crash Investigations	Traffic Warnings	Traffic Citations	Business & Residential Area Checks	Theft / Watch Programs	Community Contact/Assist Citizen	Directed Patrol						
January	73	107	6	10	4	0	7	8	36	14	5422	296	221	571						
February	74	110	8	5	1	0	9	11	38	15	3416	264	225	452						
March	79	120	8	12	4	0	11	11	38	17	3050	361	243	470						
April	59	106	8	7	1	0	3	17	27	13	2971	314	181	335						
May	78	136	7	7	3	0	6	16	88	32	3277	322	173	361						
June																				
July																				
August																				
September																				
October																				
November																				
December																				
Yearly Totals	363	579	37	41	13	0	36	63	227	91	18136	1557	1043	2189						

Reports and Supplements include FIR, Incident, and Offense Reports. Stats consist of those who are full time, assigned to light duty, and Reserve. Those who have additional assignments in patrol within the agency are reported in additional documents: Detective Gibson (CIS), Ofc Diaz Leon (Accreditation), Sgt Izrailov (Community Policing/Code Compliance).

This report does NOT reflect all the work or activity completed by the members of this Agency. It provides a snapshot of activity in selected areas identified by month, per calendar year. The areas chosen are those which are often asked about or requested. Data Sources: TriTech CAD, Visinet, ACSS Web, PCSONET Custom Query, TRACS, and daily reports. Tabulated by EP and LB

Volunteer hours running total for the year is 322 hours. These hours are donated to the Town of Kenneth City by 5 volunteers and 5 Reserve Officers.

Clay Miller

KCPD Monthly Stats May 2022

Detective S. Gibson

Number of cases started with: 25, with 5 more waiting to be assigned

Number of cases ended with: 24, with 6 more waiting to be assigned

New cases assigned for the month

FELONY	4
MISDEMEANOR	
NON-CRIMINAL	3

Case dispositions

INACTIVATED	5
CLOSED WITH MISDEMEANOR ARREST	
CLOSED WITH FELONY ARREST	
CLOSED OTHER	3
CLOSED SAO REFERRAL	
CLEARED WITH WAIVER	

Other Activity

SURVEILLANCES	
PHOTOPACKS	
EVIDENCE STATUS REQUESTS	
INITIAL REPORTS	
SUPPLEMENTS	12
WARRANTS	
TOUCH DNA PROCESSING / BUCCALS	
SUSPECTS RESULTING FROM TOUCH DNA	
OTHER: CCTV FOOTAGE, CELL TRACKING, D/L	3
SUBPOENAS	2
JAIL RECORDINGS	28
REPORTS REVIEWED	35
CONTACT ATTEMPTS	2
INTERVIEWS	7
TRANSPORTING PROPERTY/EVIDENCE	4
RECOVERED STOLEN PROPERTY	
BOLOS	
APADS	

KCPD Community Policing Overview

May, 2022

Sergeant Andy Izrailov, Supervisor, COMMUNITY POLICING

During the Month of May, the Town held a “Fishing with a Cop” event, which was attended by numerous town residents, staff and police officers.

Upcoming next month community policing events will be the Kenneth City “Fourth of July Festival.” Officers have been patrolling the town on mountain bikes, and the Polaris patrol vehicle, as time permits. This was well received by numerous town residents.

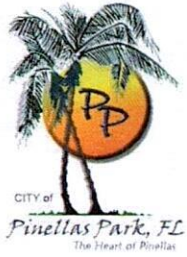
The Police Department continues to maintain Operation Medicine Cabinet, which allows residents to drop off old or unwanted prescription medication for safe disposal.

The police department conducted several in progress code compliance investigations. Sgt. Andy Izrailov and other department officers continue to investigate life/safety Town code violations.

Officers continued to conduct numerous Town business area patrols, for ongoing homeless subject complaints. The goal still is to provide a safe alternative for the homeless subjects, such as Safe Harbor and Pinellas Hope, as well as other resources, to create a positive resolution for everyone. Officers continued to conduct directed patrol of all Town parks and Town Hall for suspicious activity/persons.

All Town officers have been conducting traffic stops to educate drivers on traffic infractions and traffic safety issues. Further, the agency deterrent vehicle (ghost car) has been placed at numerous business/roadway locations throughout the Town to deter traffic violations/criminal activity. Town residents and local businesses are supportive of the ghost car placement and we continue to receive positive feedback.

Further, officers on midnight shift placed *Third Watch* notices throughout the Town as they checked closed business locations after hours. Officers conducted *House Checks* as requested by homeowners whose property was unattended. Officers continue to be active in the community, by making citizen contacts, handing out police stickers, coloring books, and bicycle lights.



City of
PINELLAS PARK, FLORIDA

PINELLAS PARK FIRE DEPARTMENT
 11350 43RD STREET NORTH, CLEARWATER, FL 33762
 TEL 727-369-5803, FAX 727-369-5785

FIRE DEPARTMENT REPORT
 KENNETH CITY COUNCIL MEETING
 June 8, 2022

For the month of May 2022, the Fire, EMS and Life Safety activities break down as follows:

RESPONSES IN KENNETH CITY

TYPE OF RESPONSE	MONTH	YEAR TO DATE	
	May	2022	2021
MEDICAL	139	683	609
VEHICLE COLLISION	3	24	21
FIRE RELATED CALLS	9	53	29
TOTAL RESPONSES	151	760	659

ENGINE 16 RESPONSES

TYPE OF RESPONSE	IN KENNETH CITY			OUTSIDE KENNETH CITY			TOTAL RESPONSES		
	MONTH	YEAR TO DATE		MONTH	YEAR TO DATE		MONTH	YEAR TO DATE	
	May	2022	2021	May	2022	2021	May	2022	2021
MEDICAL	30	219	186	76	257	207	106	476	393
VEHICLE COLLISION	2	12	9	15	102	81	17	114	90
FIRE RELATED CALLS	9	41	23	31	137	247	40	178	270
TOTAL RESPONSES	41	272	218	122	496	535	163	768	753

LIFE SAFETY MANAGEMENT SERVICES

TYPE OF SERVICE PERFORMED	MONTH	YEAR TO DATE	
	May	2022	2021
INSPECTIONS	11	106	209
FALSE ALARMS	3	23	15
PLANS REVIEW	5	22	3
SMOKE ALARMS INSTALLED	4	20	0
PUBLIC EDUCATION PROGRAMS	0	0	4
PROGRAM ATTENDANCE	0	0	48

Respectfully submitted,

Brett Schlatterer

Brett Schlatterer, Fire Chief