

ST. LUCIE WEST SERVICES DISTRICT



BOARD OF SUPERVISORS' REGULAR BOARD MEETING & PUBLIC HEARING JULY 8, 2025 9:00 A.M.

AGENDA
ST. LUCIE WEST SERVICES DISTRICT
BOARD OF SUPERVISORS'
REGULAR BOARD MEETING & PUBLIC HEARING
July 8, 2025
9:00 a.m.
450 SW Utility Drive
Port St. Lucie, Florida 34986
CALL IN 1-800-743-4099 PARTICIPANT CODE 400494

A. Call to Order

B. Pledge of Allegiance

C. Roll Call

D. Approval of Minutes

1. June 2, 2025, Workshop
2. June 3, 2025, Regular Board Meeting

E. Public Hearing 1

1. **Call to Order**
2. **Roll Call**
3. **Receive Public Comments** on (1) Adopting Revised Employee Job Descriptions, and (2) Amending Chapter A-III, Operating Policies and Procedures of the St. Lucie West Services District, Regarding Positions, Qualifications, Compensation, Employment, and Termination of District Employees
 - **PH 1** – Consider Resolution No. 2025-05 – (1) Adopting Revised Employee Job Descriptions, and (2) Amending Chapter A-III, Operating Policies and Procedures of the St. Lucie West Services District, Regarding Positions, Qualifications, Compensation
4. **Close the Public Hearing**

F. Public Comment

G. District Attorney

DA 1 – Status Report/Updates

H. District Engineer

DE 1 – Status Report/Updates

I. District Manager

Action Items

- DM 1** – District Manager and Staff Prescriptive Goals and Performance Objectives for FY 2026
- DM 2** – District Manager FY2025 Year End Report
- DM 3** – Consider Approval of the Fifth Amendment to Utility SCADA System Service Agreement
- DM 4** – Consider Authorization to Renew with Florida Blue as the District Insurance Provider
- DM 5** – Consider Acceptance of the FY2024 Financial Report by Grau & Associates
- DM 6** – Consider Approval of the Request to Change in Engineering Services from Infrastructure Solutions Services
- DM 7** – Other Items

J. Consent Agenda

- CA 1** – Monthly Report on Public Works
- CA 2** – Monthly Report on Utilities Operations

CA 3 – Monthly Report on Capital Improvement Projects

CA 4 – Monthly Report on Billing and Customer Service

CA 5 – Public Information Officer Monthly Report

CA 6 – Financial Statements for May, 2025

CA 7 – Transfer Funds for the R&R & UC Account

CA 8 – Surplus Items

K. Supervisors' Requests

L. Adjournment

St. Lucie West Services District
Workshop Meeting
June 2, 2025, at 9:00 a.m.

(Please note: These minutes are not verbatim. A CD recording of the Workshop Meeting is available on file.)

Board Members Present

Dominick Graci – Chairman – in-person
Gregg Ney – Vice Chairman – in-person
Diane Haseltine – Secretary – in-person
Rose Carvelli – Supervisor – in-person (who arrived at 9:17 a.m.)
Kevin Dolan – Supervisor – in-person

Staff Present

Josh Miller, District Manager, St. Lucie West Services District (“SLWSD”) – in-person
Gerard Rouse, Public Works Director/Assistant District Manager, SLWSD – in-person
TJ Bayer – Assistant Utilities Director, SLWSD – in-person
Maddie Maldonado – Director of Office Administration, SLWSD – in-person
Searg Davidian, Assistant Public Works Director, SLWSD – in-person
Anderson “Andy” Bomjardim, Public Information Officer, SLWSD – in-person
Steve Conteaguero, General Counsel, Nason, Yeager, Gerson, Harris & Fumero, P.A. – via phone
Jason Pierman, Special District Services, Inc. (“SDS”) – in-person
Laura Archer, Recording Secretary, SDS – via phone
Stephanie Brown, SDS – in-person

Also present were Ryan Smith of Ryper Water Analytics; Jack Doughney, the District’s Intergovernmental Liaison; and Deane Piekara, a District resident.

Guests Present (Sign-In Sheet Attached)

A. Call to Order

The Workshop Meeting was called to order at 9:00 a.m.

B. Pledge of Allegiance

C. Roll Call

It was noted that Supervisor Rose Carvelli was on her way to the meeting.

D. Approval of Minutes

- 1. May 5, 2025, Workshop**
- 2. May 6, 2025, Regular Board Meeting**

There were no corrections or revisions made to either set of minutes.

E. Public Comment

Mr. Piekara noted his concern with the proposed increase of assessments, noting that he believes the community will blame it on the Reserve CDD. He asked if it would be spread over 2 years.

Chairman Graci agreed that it was tough to digest but reminded those present of the City's return of 75% of the stormwater fees to the District. He noted that if that amount were to decrease, the assessment could be more.

**F. District Attorney
DA 1 – Status Report/Updates**

Mr. Conteaguero presented the report noting that counsel was reviewing the District's employment manual and policies. Discussion ensued.

Mr. Conteaguero also indicated that he had completed an Easement Encroachment Agreement with 937 Grand Reserves and drafted a Memorandum and public notice for the candidate qualifying for the 2026 Supervisor Election.

He also indicated a change in the agenda formats for Workshops and Meetings.

Chairman Graci expressed his happiness with having Mr. Conteaguero's firm on board noting that they were very proactive.

**G. District Engineer
DE 1 – Status Report/Updates**

Mr. Miller presented the report indicating that Mr. Zanganah had retired. Discussion ensued regarding several items outlined in the report, which was provided in the meeting package.

**H. District Manager
Actions Items**

DM 1 – District Manager and Staff Prescribed Goals and Performance Objectives for FY 2026

Mr. Miller presented the item noting that it was a standard part of his contract as District Manager and that the language in blue would be included in the description.

Discussion ensued regarding the Employee of the Year as well as the Cost Reduction Program and incentives.

That concluded discussion regarding this item.

DM 2 – Consider Resolution No. 2025-01 – Adopting a Fiscal Year 2026 Proposed Annual Budget and Setting a Public Hearing Date

Mr. Miller presented Resolution No. 2025-01, entitled:

RESOLUTION NO. 2025-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE ST. LUCIE WEST SERVICES DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2026.

The Board agreed that there was nothing in the proposed budget that came as a surprise. They are happy with the proposed budget, as presented.

Mr. Miller noted that the Public Hearing on the Budget would be held on August 26, 2025.

Mr. Miller then introduced Ryan Smith of Ryper Water Analytics, the District's rate consultant, who made his annual Power Point presentation on the status of the District's finances.

Mr. Smith first went over the purpose of the study, indicating that it was a combination of the following items:

Projections of Revenues (Inflows) – Water/Sewer Sales, Growth/Acquisitions, Other Revenues, etc.

Projection of Revenue Requirements (Outflows) – Operations, Capital, Debt, etc.

Projection of Fund Balances – Risk Mitigation and Ability to Appropriate

Compliance – Confirm Compliance with Master Indenture (Bond Agreement) and District Policies

and was based on the following key assumptions:

Revenue and Refunding Bonds, Series 2024

- Refunded All Existing Bonds and Provided Funding for Water Plant Expansion
- Allowed for Modification of Master Trust Indenture

Reserve CDD Acquisition

- Customers Served on a Retail Basis, Commencing in January 2027
- \$1 Million Escrow Reserve Requirement
- Additional Revenues (Above Current Wholesale Sales)
Water = \$560,000 per Year / Wastewater = \$667,000 per Year

Operating Budget Increased to Account for Additional Personnel and Near-Term Acquisition Related Expenses

Connection Fee Sales Updated Based on Status of Known Developments

Supervisor Rose Carvelli arrived at approximately 9:17 a.m.

Mr. Smith then showed a comparison of FY-2026 Debt Service Coverage and the forecast for the Debt Service Coverage, revenue requirements and recommendations for the FYs 2025 through FY 2029.

Mr. Smith also showed rate comparisons of a monthly residential bill, assuming 3,000 gallons of water and wastewater service and 5,000 gallons of irrigation service, noting that the District still fell well below the other utilities' average.

Mr. Miller and the Board thanked Mr. Smith for his thorough report.

DM 3 – Consider Setting a Public Hearing to Adopt Resolution No. 2025-03 – Levy a Non-Ad Valorem Assessment for Water Management Bonds and Operations and Maintenance Costs, within the St. Lucie West Services District for the Period October 1, 2025, through September 30, 2026

Mr. Miller presented the item and indicated that this was merely a request to set the Public Hearing.

Mr. Miller indicated that the proposed Benefit Special Assessment was to amortize the cost of constructing (repay bonds that are financed) the District's stormwater management system.

Mr. Miller indicated that the proposed Maintenance Special Assessment in the amount of \$206.00 per benefit unit is to maintain and preserve the facilities and projects of the District. He further indicated that this was a \$30 increase from FY 2025.

A brief discussion ensued.

DM 4 – Consider Request to Advertise for a Public Hearing to Consider Adoption of an Amendment of the District's Rules Establishing Water, Wastewater and Irrigation Water System Rates, Fees, and Charges

Mr. Miller explained that this was a request for authorization to advertise a Public Hearing for August 26, 2025, to consider amending the District's Rules Establishing Water, Wastewater and Irrigation Water System Rates, Fees and Charges with a 9% increase.

Mr. Miller noted that the August 26, 2025, meeting would include 3 Public Hearings: one on the Proposed FY 2026 Budget; the \$30 increase in Maintenance Special Assessments and the 9% increase in water and wastewater rates.

The Board had no questions regarding this request.

DM 5 – Other Items

Mr. Miller presented a Partial Termination of Easement regarding Somerset Academy St. Lucie, indicating that this was an administrative matter.

Mr. Miller advised of the upcoming Hurricane Preparedness Expo 2025 being held June 7, 2025, at which the District would have a table set up with staff to answer questions.

Mr. Miller brought up the mandatory 4 hours of ethics training, asking if the Board wishes to schedule an in-person session. Chairman Graci suggested keeping the Board Members after the meeting in October to run through the training. Mr. Miller will make arrangements for that training along with bringing lunch in.

Mr. Miller noted that hoped to bring to the Board at the July meeting a proposed Cost Reduction Program.

A brief discussion ensued.

That concluded Mr. Miller's updates.

I. Consent Agenda

CA 1 – Monthly Report on Public Works

CA 2 – Monthly Report on Utilities Operations

CA 3 – Monthly Report on Capital Improvement Projects

CA 4 – Monthly Report on Billing and Customer Service

CA 5 – Public Information Officer Monthly Report

CA 6 – Financial Statements for April 2025

CA 7 – Consider Transfer of Funds for the R&R & UC Accounts

CA 8 – Surplus Items

Mr. Miller presented Consent Agenda Items CA 1 through CA 8 and asked if there were any questions.

A brief discussion ensued regarding water meter sizes.

There were no questions from the Board Members.

J. Supervisor Requests

Chairman Graci asked Mr. Bomjardim to review the Public Information Officer Monthly Report.

Mr. Bomjardim advised of the article in The Voice and the misinformation presented. The Board was surprised that the District did not receive more phone calls about the article. Mr. Bomjardim cautioned the use of the media and noted that he was working on better communication directly with the residents.

Mr. Bomjardim indicated that the April edition of the District's newsletter featured the upcoming launch of the Bill Pay Water Leak and Usage Notification feature, which will soon be available to online bill pay users, which will allow customers to receive e-mails and text alerts in the event of a water leak or when their water usage exceeds a self-set daily threshold.

Secretary Haseltine asked Mr. Bomjardim if he had advised property managements in the different communities about this new feature to which Mr. Bomjardim advised that he had met with the Presidents' Council regarding this item.

Supervisor Carvelli apologized for being late to the meeting. She went on to express her community's happiness with the District and said she had received no complaints from her constituents.

Vice Chairman Ney agreed with the Chairman's request for in-person ethics training.

There were no further Supervisor Requests.

K. Adjournment

There being no further items to be addressed, the Workshop Meeting was adjourned at 10:11 a.m. There were no objections.

Workshop Meeting Minutes Signature Page

Chairman/Vice Chairman

Secretary/Assistant Secretary

Date Approved _____

St. Lucie West Services District
Regular Board Meeting
June 3, 2025, at 9:00 a.m.

(Please note: These minutes are not verbatim. A CD recording of the Regular Board Meeting is available on file.)

Board Members Present

Dominick Graci – Chairman – in-person
Gregg Ney – Vice Chairman – in-person (who arrived at 9:03 a.m.)
Diane Haseltine – Secretary – in-person
Rose Carvelli – Supervisor – in-person
Kevin Dolan – Supervisor – in-person

Staff Present

Josh Miller, District Manager, St. Lucie West Services District (“SLWSD”) – in-person
Gerard Rouse, Public Works Director/Assistant District Manager, SLWSD – in-person
TJ Bayer – Assistant Utilities Director, SLWSD – in-person
Maddie Maldonado – Director of Office Administration, SLWSD – in-person
Lisa-Marie Beans, Human Resources Specialist, SLWSD – in-person
Searg Davidian, Assistant Public Works Director – SLWSD
Anderson “Andy” Bomjardim, Public Information Officer, SLWSD – in-person
Steve Conteaguero & John Fumero, General Counsel, Nason, Yeager, Gerson, Harris & Fumero, P.A. – in-person
Jason Pierman, Secretary/Treasurer, Special District Services, Inc. (“SDS”) – via phone
Laura Archer, Recording Secretary, SDS – in-person
Stephanie Brown, SDS – in-person

Also present were Donna Rhoden from the City of Port St. Lucie; and Deane Piekara, a District resident.

Guests Present (Sign-In Sheet Attached)

A. Call to Order

Chairman Graci called the Regular Board Meeting to order at 9:00 a.m.

B. Pledge of Allegiance

C. Roll Call

It was noted that Vice Chairman Ney was absent.

D. Approval of Minutes

1. **May 5, 2025, Workshop**
2. **May 6, 2025, Regular Board Meeting**

The minutes of the May 5, 2025, Workshop and the May 6, 2025, Regular Board Meeting were presented for consideration.

A **MOTION** was made by Secretary Haseltine, seconded by Supervisor Dolan approving the minutes of the May 5, 2025, Workshop, as presented, and the minutes of the May 6, 2025, Regular Board Meeting, as presented. Upon being put to a vote, the **MOTION** carried 4 to 0.

E. Public Comment

There was no public comment at this time.

**F. District Attorney
DA 1 – Status Report/Updates**

Mr. Fumero presented the report and briefly went over those items.

Mr. Fumero then presented the Termination and Release of Deed Restriction(s) between the District and AGLI Realty LLC relative to commercial property in connection with the prior owner's plans to develop as a 60,000 square foot office/call center, which is no longer needed.

Vice Chairman Ney arrived at approximately 9:03 a.m.

There were no questions from the Board Members.

**G. District Engineer
DE 1 – Status Report/Updates**

Mr. Miller noted that no one was present from Infrastructure Solution Services (ISS) either in-person or over the phone. Mr. Miller noted that Mr. Zanganeh had recently retired and he was not sure who would be taking his place.

Chairman Graci asked where we were with the Reserve. Mr. Miller indicated that the Reserve had received several submissions in response to the Reserve's RFQ for Engineering and that the Reserve Board was expected to make a selection at their next meeting, which was scheduled for next week.

There was a brief discussion regarding ISS joining Green Companies, Inc./HR Green, Inc.

**H. District Manager
Action Items**

DM 1 – District Manager and Staff Prescribed Goals and Performance Objectives for FY 2026

Mr. Miller presented the item noting that he could revise it to include the Employee Recognition Program and the Cost Savings Program.

A **MOTION** was made by Secretary Haseltine, seconded by Vice Chairman Ney tabling this item to the next meeting. Upon being put to a vote, the **MOTION** carried unanimously.

DM 2 – Consider Resolution No. 2025-01 – Adopting a Fiscal Year 2026 Proposed Annual Budget and Setting a Public Hearing Date

Mr. Miller presented Resolution No. 2025-01, entitled:

RESOLUTION NO. 2025-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE ST. LUCIE WEST SERVICES DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2026.

A **MOTION** was made by Secretary Haseltine, seconded by Supervisor Dolan and passed unanimously adopting Resolution No. 2025-01, as presented, setting the Public Hearing for August 26, 2025.

DM 3 – Consider Setting a Public Hearing to Adopt Resolution No. 2025-03 – Levy a Non-Ad Valorem Assessment for Water Management Bonds and Operations and Maintenance Costs, within the St. Lucie West Services District for the Period October 1, 2025, through September 30, 2026

Mr. Miller presented the item and noted that the Benefit Special Assessment in the amount of \$132.51 per benefit unit shown in the abstract was incorrect. The correct amount should be \$208.84. He further noted that the Maintenance Special Assessment in the amount of \$206.00 per benefit unit was correct and reflected a \$30 increase from the previous fiscal year's budget.

A **MOTION** was made by Supervisor Dolan, seconded by Secretary Haseltine and passed unanimously approving the setting of a Public Hearing for August 26, 2025, to Consider Adoption of Resolution No. 2025-03 – Levy a Non-Ad Valorem Assessment for Water Management Bonds and Maintenance Costs within the St. Lucie West Services District for the Period October 1, 2025, through September 30, 2026, amended to reflect the above-noted correction.

DM 4 – Consider Request to Advertise for a Public Hearing to Consider Adoption of an Amendment of the District's Rules Establishing Water, Wastewater and Irrigation Water System Rates, Fees and Charges

Mr. Miller presented the item and recommended approval.

A **MOTION** was made by Supervisor Dolan, seconded by Supervisor Carvelli and passed unanimously the advertising for a Public Hearing on August 26, 2025, to Consider Adoption of an Amendment of the District's Rules Establishing Water, Wastewater and Irrigation Water System Rates, Fees and Charges, as presented.

DM 5 – Other Items

Mr. Miller briefly went over the Partial Termination of Easement regarding Somerset Academy St. Lucie, indicating that this was an administrative formality that coincides with the document presented at last month's meeting.

Mr. Miller noted the upcoming Hurricane Preparedness Expo 2025 at which the District would have a booth set up with staff to answer questions and hand out hurricane preparedness magnet with suggestions from the District.

Mr. Miller noted that he would work on organizing the 4-hour ethics training after the October Board Meeting.

Mr. Miller indicated that he would have something to present to the Board at the July meeting regarding the Employee Recognition Program.

Mr. Bomjardim presented a Bulletin Detail Report from the GovDelivery system regarding notification to the public concerning the Reserve Community Development District Incorporating with the St. Lucie West Services District for Improved Utility Services. He noted that the information was distributed to subscribers of the SLWSD E-Newsletter, the SLWSD General News and/or the SLWSD Website News. The report provided statistics of how many recipients (4,797) there were with a 99% delivery rate and gave additional specific e-mail delivery stats. The Board had several questions, and it was recommended to request updated e-mail addresses from customers in order to be included in this important notification system because reaching only less than 5,000 customers is missing approximately 2,000 residents.

Chairman Graci asked about the progress of Injection Well #2 to which Mr. Miller noted that the project was mobilized last week, and he expects drilling to begin in the next 2 weeks which is expected to continue for 4 to 6 months.

That concluded Mr. Miller's updates.

I. Consent Agenda

CA 1 – Monthly Report on Public Works

CA 2 – Monthly Report on Utilities Operations

CA 3 – Monthly Report on Capital Improvement Projects

CA 4 – Monthly Report on Billing and Customer Service

CA 5 – Public Information Officer Monthly Report

CA 6 – Financial Statements for April 2025

CA 7 – Consider Transfer of Funds for the R&R & UC Accounts

CA 8 – Surplus Items

A **MOTION** was made by Vice Chairman Ney, seconded by Secretary Haseltine approving Consent Agenda items CA 1 through CA 8, as presented. Upon being put to a vote, the **MOTION** carried unanimously.

J. Supervisor Requests

Supervisor Carvelli had nothing further.

Vice Chairman Ney apologized for his tardiness.

Supervisor Dolan brought up a question he had from yesterday's Workshop regarding the irrigation schedule, asking if there was a need to amend the schedule. Mr. Miller noted that if an individual contacts the District to request a change, the District tries to accommodate their request. Mr. Miller indicated that they were working on entertaining a new irrigation model but had not yet got to that point.

Chairman Graci gave a brief overview of how the Reserve CDD situation came to be for the benefit of the newest Board Members, noting that taking on the Reserve's water and wastewater needs brings benefit to the District; namely more customers, more revenue. Discussion ensued regarding the need for expansion regardless of taking over the Reserve's needs due to the need for redundancy and having a bigger well.

Mr. Miller noted, with the rise in costs, it is prudent to make these improvements now at a cost of \$7.3 Million and not wait for prices to further increase.

That concluded Supervisor Requests.

K. Adjournment

There being no further items to be addressed, the Regular Board Meeting was adjourned at 9:50 a.m. by Chairman Graci. There were no objections.

Regular Board Meeting Minutes Signature Page

Chairman/Vice Chairman

Secretary/Assistant Secretary

Date Approved _____

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

PH 1 Public Hearing to Consider Adoption of Resolution No. 2025-05: A Resolution (1) Adopting Revised Employee Job Descriptions, and (2) Amending Chapter A-III, Operating Policies and Procedures of the St. Lucie West Services District, Regarding Positions, Qualifications, Compensation, Employment, and Termination of District Employees; Providing an Effective Date.

Summary

The District will hold a public hearing on Tuesday July 8, 2025 to consider the adoption of Resolution No. 2025-05: A Resolution (1) Adopting Revised Employee Job Descriptions, and (2) Amending Chapter A-III, Operating Policies and Procedures of the St. Lucie West Services District, Regarding Positions, Qualifications, Compensation, Employment, and Termination of District Employees; Providing an Effective Date.

The Public Hearing was advertised in the St. Lucie News Tribune on June 13, 2025. The attached affidavit of publication verifies that advertisement of this public hearing was published within the general circulation at least 28 days prior to the public hearing being held on July 8, 2025.

Recommendation

Staff recommends adoption of Resolution No. 2025-05

District Manager: Joshua Miller

Budget Impact

Project Number:

Available Project Budget: \$0.00

ORG Number:

This Project: \$0.00

Available Balance: \$0.00

Board Action

Moved by:

Seconded by:

Action Taken:



Florida

PO Box 631244 Cincinnati, OH 45263-1244

GANNETT

AFFIDAVIT OF PUBLICATION

Laura Archer
Slw Services District
St Lucie West Services District
2501 Burns RD # A
Palm Beach Gardens FL 33410-5207

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Advertising Representative of the Indian River Press Journal/St Lucie News Tribune/Stuart News, newspapers published in Indian River/St Lucie/Martin Counties, Florida; that the attached copy of advertisement, being a Legal Ad in the matter of Govt Public Notices, was published on the publicly accessible websites of Indian River/St Lucie/Martin Counties, Florida, or in a newspaper by print in the issues of, on:

06/13/2025

Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.

Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 06/13/2025

Legal Clerk

Notary, State of WI, County of Brown

3.7.27

My commission expires

Publication Cost: \$186.24

Tax Amount: \$0.00

Payment Cost: \$186.24

Order No: 11391245

of Copies:

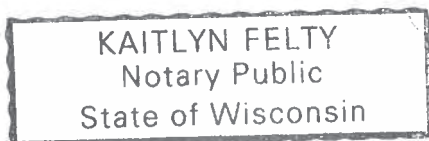
Customer No: 1125983

1

PO #: Public Hearing 7/8

THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.



NOTICE OF PUBLIC HEARINGS OF THE ST. LUCIE WEST SERVICES DISTRICT TO CONSIDER (1) ADOPTING REVISED EMPLOYEE JOB DESCRIPTIONS, AND ADOPTING JOB DESCRIPTIONS FOR NEW POSITIONS, AND (2) AMENDING CHAPTER A-III, RULES OF THE DISTRICT REGARDING POSITIONS, QUALIFICATIONS, COMPENSATION, EMPLOYMENT, AND TERMINATION OF DISTRICT EMPLOYEES, BOTH AS RULES OF DISTRICT

The Board of Supervisors ("Board") of the ST. LUCIE WEST SERVICES DISTRICT ("District") will hold two public hearings in accordance with Section 120.54, Florida Statutes, on Tuesday, July 8, 2025, at 9:00 a.m., or as soon thereafter as may be heard, in the District's Board Meeting Room, 450 SW Utility Drive, Port St. Lucie, Florida 34986. The purpose of the hearings is:

Public Hearing 1—to receive public comments and objections to the proposed revision of all District employee job descriptions, including the deletion of certain job descriptions and the addition of job descriptions for certain new positions of the District ("Job Description Revisions"). The purpose of the Job Description Revisions is to revise certain current employee job descriptions and adopt job descriptions for the new positions.

Public Hearing 2—to receive public comments and objections to the proposed amendment of Chapter A-III, Rules of the District Regarding Positions, Qualifications, Compensation, Employment, and Termination of District Employees, to remove the list of "high ranking employees" as defined in Section 1(a) ("Chapter A-III Amendment") and, together with the Job Description Revisions, the Rules.

If adopted, the proposed Rules shall become effective upon approval by the Board of the District. Copies of the proposed Rules will be available at the District Office, 450 SW Utility Drive, Port St. Lucie, Florida. Any person who wishes to provide a proposal for a lower cost regulatory alternative, as provided by Section 120.54(1), Florida Statutes, must do so in writing within twenty-one (21) days after publication of this notice. Each person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that the person will need a record of the proceedings and that, accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

In accordance with the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at this meeting should contact the District Administrator at (888)630-4922 and/or toll-free at (877)737-4922 at least five (5) calendar days prior to the date of the meeting. Persons who are hearing impaired may contact the Florida Relay Service at (800)955-8770 for aid in contacting the District's office.

Dated this 6th day of May, 2025
Joshua Miller, District Manager
ST. LUCIE WEST SERVICES DISTRICT
www.slwdsd.org
PUBLISH: ST. LUCIE NEWS TRIBUNE 06/13/25; #11391245

RESOLUTION NO. 2025-05

A RESOLUTION 1) ADOPTING REVISED EMPLOYEE JOB DESCRIPTIONS, INCLUDING THE DELETION OF CERTAIN EXISTING JOB DESCRIPTIONS AND THE ADDITION OF JOB DESCRIPTIONS FOR CERTAIN NEW POSITIONS, AS POLICY AND PROCEDURE OF THE ST. LUCIE WEST SERVICES DISTRICT 2) AMENDING CHAPTER A-III, OPERATING POLICIES AND PROCEDURES OF THE ST. LUCIE WEST SERVICES DISTRICT REGARDING POSITIONS, QUALIFICATIONS, COMPENSATION, EMPLOYMENT, AND TERMINATION OF DISTRICT EMPLOYEES; AND PROVIDING AN EFFECTIVE DATE.

SECTION 1. AUTHORITY FOR THIS RESOLUTION. This Resolution is adopted pursuant to sections 190.011(5), and 190.007(1), and 190.035, Florida Statutes.

SECTION 2. FINDINGS. The Board of Supervisors of the St. Lucie West Services District ("Board") hereby finds and determines as follows:

A. The St. Lucie West Services District ("District") is a local unit of special-purpose government organized and existing under and pursuant to Chapter 190, Florida Statutes, as amended.

B. The Board is authorized under Chapter 190, Florida Statutes, to adopt this resolution: and

C. The purpose of this Resolution is to revise, amend and codify: 1) certain current District employee job descriptions, including the deletion of certain existing job descriptions and the addition of job descriptions for new positions 2) amend Chapter A-III, Operating Policies and Procedures of the St. Lucie West Services District, that relates to the Positions, Qualifications, Compensation, Employment, and Termination of District Employees in order to remove any reference to "high ranking employees" as defined in Section 1(a).

D. This Resolution is necessary to codify and establish 1) revised employee job descriptions for District employees and 2) maintain the roles and responsibilities of District personnel.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF ST. LUCIE WEST SERVICES DISTRICT:

SECTION 3. ADOPTION OF REVISED JOB DESCRIPTIONS. Revised Employee Job Descriptions for all positions with the District are hereby adopted and established, to read as set forth in the compilation of St. Lucie West Services District Employee Job Descriptions attached as Exhibit A. **CHAPTER A-III AMENDED.** Chapter A-III, regarding Positions, Qualification, Compensation, Employment, and Termination of District Employees is hereby amended to read as set forth in the attached Amendment V to such policies (with new text shown in underline, and deleted text shown as struck through).

SECTION 4. EFFECTIVE DATE. This Resolution shall become effective on the date of adoption.

APPROVED AND ADOPTED this 8th day of July, 2025.

ST. LUCIE WEST SERVICES DISTRICT

Attest:

Secretary

By: _____
Dominick Graci, Chairman
Board of Supervisors

EXHIBIT A
Job Descriptions



TITLE: Customer Service Representative I
JOB CODE: 3001
GRADE: 104
DEPARTMENT: Utilities
REPORTS: Director of Office Administration or Designee
FLSA STATUS: Non-Exempt
CLASSIFICATION: Essential
CREATION DATE: October 21, 2008
REVISION DATE(S): June 1, 2010; April 2, 2013; December 5, 2017; July 12, 2022; January 9, 2024, 2025

This position is Essential and is required to report to duty before, during, and immediately after a declared storm event.

POSITION SUMMARY

Under general supervision performs customer service and clerical duties to assist in the operation of the District's Utilities Departments. Work involves answering calls, processing mail, utility connection documents, customer payments, deposits, processing account information, refunds, service, and assisting with other administrative tasks.

DUTIES & RESPONSIBILITIES

The following duties are illustrative for this position. The omission of specific duties does not exclude them from the classification if the work is similar, related, or a logical assignment for this classification. Other duties may be required and assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. Essential functions indicated with an *.

- Provides customer service by taking immediate action to incoming requests, maintaining high levels of quality and productivity and generating innovative solutions to work processes. *
- Provides information in person, by telephone and e-mail to customers and members of the public regarding services, rules & regulations, fees, policies, and procedures. *
- Ensure that appropriate actions are taken to answer customer questions, concerns or transfer calls to appropriate staff for resolution. *
- Accepts changes and makes necessary modifications to customer utility accounts in the billing software. *
- Assists customers with billing questions and researches the billing software to collaborate with billing staff to resolve any inconsistencies in customers' accounts. *



- Receives and processes applications for new customers and completes the termination process according to the different types of accounts and services. *
- Assists utility customers with payment options online and on phone systems. *
- Create letters to customers for all processes related to customer service and utility billing. *
- Completes balance transfers within the billing software*
- Processes customer utility payments and issues receipts according to policies and procedures. *
- Receives daily mail and processes customer correspondence and distributes other mail accordingly. *
- Initiates, processes, and schedules service orders. *
- Assists with district and customer records according to the State of Florida General Records Schedule GS1-SL and GS-14.
- Assists the billing staff with clerical tasks.
- Serves as back up for administrative duties related to on-call and locates.
- Attend meetings as needed.

MINIMUM REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- Requires a high school diploma or GED equivalent with two to three years of experience in customer service, billing software, and administrative work or any equivalent combination of education and experience that provides the required knowledge skills and abilities to perform this job.

Certifications, Licenses, Registrations:

- Possession of a valid State of Florida driver's license.



Knowledge, Skills & Abilities:

The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

- Excellent communication skills including active listening.
- Excellent interpersonal and customer service skills.
- Excellent organizational skills and attention to detail.
- Ability to understand and follow oral and written directions of office procedures.
- Ability to maintain calm in pressure situations and adapt quickly to change.
- Ability to communicate in a courteous and professional manner during challenging customer situations.
- Ability to create and edit documents in Microsoft Office Suite, Word, Excel, and other related software.
- Ability to access, input and retrieve information from a computer.
- Ability to make mathematical calculations with reasonable speed and accuracy.
- Ability to operate a variety of automated office machines including computers, copiers, scanners, calculators, postage machines, etc.
- Ability to establish and maintain effective working relationships with employees and the public.

PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to sit, talk, hear, and use hands to finger, handle, or feel, reach with hands and arms. The employee is required to sit most of the time but occasionally is required to walk, stand, stoop, and crouch for brief periods of time. The employee may lift and/or move up to 10 lbs. Specific vision abilities required by this job include close vision and ability to adjust focus. The noise level in the environment is usually moderate.

DISCLAIMER

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TITLE: Utilities Billing Specialist

JOB CODE: 3003

GRADE: 107

DEPARTMENT: Utilities

REPORTS: Director of Office Administration or Designee

FLSA STATUS: Non-Exempt

CLASSIFICATION: Essential

CREATION DATE: October 21, 2008

REVISION DATE(S): June 1, 2010; April 2, 2013; December 5, 2017; July 12, 2022; January 9, 2024, 2025

This position is Essential and is required to report to duty before, during, and immediately after a declared storm event.

POSITION SUMMARY

Under general supervision this position is responsible for working with the Utilities Billing Specialist Lead to accurately produce and verify all district utility billing and meter reading functions, as well as work on customer inquiries and problems. Other responsibilities include assisting with daily tasks, reconciling customer payments and accounting records, identifying and troubleshooting any inconsistencies and creating services orders as needed.

DUTIES & RESPONSIBILITIES

The following duties are illustrative for this position. The omission of specific duties does not exclude them from the classification if the work is similar, related, or a logical assignment for this classification. Other duties may be required and assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. Essential functions indicated with an *.

- Prepares monthly utility bills and other related bills and notices including final bills, and past due notices. *
- Uses billing software and other programs to view customer billing information, meter reads, consumption, payments, auto drafts, delinquent accounts, etc.*
- Performs daily cash processes by reviewing daily deposit receipts for accuracy, depositing funds into accounts, and submitting documents to the Finance Department. *
- Uses meter reading software to audit and prepare the loading of reads to ensure accuracy prior to billing. *
- Runs data pull reports for verification of meter usage within the meter software to monitor uploads reads into the billing system. *
- Uses AMI leak notifications system to address leaks and create service orders as needed. *



- Assists in the data entry of all meter inventory, meter exchanges, and new installations in the billing system. *
- Works with the Utilities Billing Specialist Lead to perform shut-off calls for delinquent accounts and assist with the lock-off register. to ensure all customers on delinquent accounts have been notified prior to performing the shut off process.*
- Works on the adjustment process by reviewing Contesting Charges requests received from customer's following District rules and management's direction. *
- Performs necessary transaction adjustments related to customer accounts, including but not limited to issues within utility billing, meter reads, account receivable batches, payment collections and arrangements. *
- Assists the Utilities Billing Specialist Lead related to new commercial connections, ERC calculations, month end process, automatic bank drafts and any other utility billing processes as needed. *
- Processes and balance various types of payment methods for all accounts receivable. *
- Research and process returned checks, credit cards or online payments by recording returned items, reversing payments, sending notifications to customers, and following up with banks or credit card merchants to ensure resolution of any discrepancies. *
- Serves as back up for the Utilities Billing Specialist Lead and customer service staff as needed. *
- Collaborate with the utilities staff as needed regarding meter readings and other tasks related to billing. *
- Attend training related to the utility billing software as required. *
- Assist and test billing system during upgrades and/or new implementations. *
- Assists with customer inquiries on billing, meter readings, payment issues and other customer account concerns. *
- Prepares and compiles documents, spreadsheets, historical data, billing account statements and other information to respond to staff and customer inquiries.
- Resolves customer bankruptcy issues as needed.

MINIMUM REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

**Education and/or Experience:**

- Requires a high school diploma or GED equivalent with two to three years of experience in accounting, billing software, customer service, and administrative work or any equivalent combination of education and experience that provides the required knowledge skills and abilities to perform this job.

Certifications, Licenses, Registrations:

- Possession of a valid State of Florida driver's license.
- Requires a Utility Customer Relations Level I certification within twenty-four months of service. (FWPCOA or equivalent).

Knowledge, Skills & Abilities:

The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

- Thorough knowledge of accounting, utility billing rules, practices, and procedures.
- Excellent communication skills including active listening.
- Excellent interpersonal and customer service skills.
- Excellent organizational skills and attention to detail.
- Ability to understand and follow oral and written directions of billing procedures.
- Ability to access, create, and edit documents in Microsoft Office Suite, Word, Excel, and other related software.
- Ability to prepare financial reports and the ability to make mathematical calculations with reasonable speed and accuracy.
- Ability to work under pressure and meet deadlines in a fast-paced and at times stressful environment.
- Ability to communicate with challenging customers and situations in a courteous and professional manner.
- Ability to operate a variety of automated office equipment including computers, copiers, scanner, calculators, postage machines and other equipment as needed.
- Ability to establish and maintain effective working relationships with employees, vendors, civic or governmental leaders, and the public.
- Ability to organize and prioritize multiple tasks to complete projects in an effective and timely manner.
- Ability to attend conferences, seminars, and classes as appropriate to enhance and maintain knowledge of trends and developments in the utility billing field.



PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to sit, talk, hear, and use hands to finger, handle, or feel, reach with hands and arms. The employee is required to sit most of the time but occasionally is required to walk, stand, stoop, and crouch for brief periods of time. The employee may lift and/or move up to 10 lbs. Specific vision abilities required by this job include close vision and ability to adjust focus. The noise level in the environment is usually moderate.

DISCLAIMER

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TITLE: Human Resources Manager
JOB CODE: 3007
GRADE: 118
DEPARTMENT: Utilities/Public Works
REPORTS: District Manager or Designee
FLSA STATUS: Exempt
CLASSIFICATION: Essential
CREATION DATE: December 5, 2017
REVISION DATE(S): July 12, 2022; January 9, 2024; TBD

This position is Essential and is required to report to duty before, during, and immediately after a declared storm event.

POSITION SUMMARY

The Human Resources (HR) Manager is responsible for overseeing all aspects of HR operations, ensuring compliance with employment laws, and fostering a productive work environment. This role manages recruitment, onboarding, benefits administration, payroll processing, employee relations, and compliance-related tasks. The HR Manager also serves as the primary point of contact for HR matters, including policy enforcement, performance evaluations, employee investigations, and leave management. Additionally, they supervise HR staff, support leadership with administrative tasks, and attend board meetings. This position requires strong organizational, communication, and leadership skills to effectively manage HR functions and support the organization's workforce.

DUTIES & RESPONSIBILITIES

The following duties are illustrative for this position. The omission of specific duties does not exclude them from the classification if the work is similar, related, or a logical assignment for this classification. Other duties may be required and assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. Essential functions indicated with an *.

- Oversee job openings, job postings, and application processes.*
- Conducts background checks and verifies employment eligibility and compliance using Form I-9 and E-Verify.*
- Conducts new hire orientation and onboarding processes.*
- Manages tasks (enrollments, renewals, and updates) related to group benefits, including health, dental, vision, short-term and long-term disability, worker's compensation, life insurance, and retirement plans.*



- Oversees preparation and distribution of performance skills evaluations (90-day & annual).*
- Manages payroll software, including adding/removing employees, processing payroll, troubleshooting errors, and managing direct deposit requests.*
- Handles employment related inquiries from employees related to policies, benefits, payroll, etc. and serving as the primary contact for HR related matters.*
- Manages the processing of staff changes, such as transfers and separations.*
- Handles tasks related to compliance and claim processing for general liability and workers' compensation claims.*
- Handles employee leave, including FMLA, ADA, STD, and LTD.*
- Manages the asset management program including procedures, software, updates, and audit; submits asset changes to the policy carrier.*
- Manages tasks related to the incident reports program including procedure, reporting, and resolution.*
- Manage tasks related to the travel & training program including procedure, preauthorization's, expense reports, and reimbursement.*
- Serve as ADA Coordinator and handle ADA-related inquiries.*
- Participates in employee investigations and claims.*
- Supervise HR Assistant and Accounts Payable Coordinator.*
- Provide administrative support to the District Manager and Directors.*
- Attend board meetings.*
- Maintain and update the employee database.*
- Develop, update, and enforce HR policies, procedures, and forms.*
- Maintain employee records and confidential files.*
- Perform clerical and administrative duties, including letters, memos, and reports.*
- Ensure records management compliance for HR.*
- Oversees Accounts Payable Coordinator duties; Serves as the Accounts Payable Coordinator Backup.*

MINIMUM REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

**Education and/or Experience:**

- High school diploma or GED equivalent is required. Possession of a bachelor's degree in human resources or a related field, coupled with five to eight years of experience in administrative work and four years' experience in Human Resources, is preferred. However, consideration will be given to any equivalent combination of education and experience that demonstrates the necessary knowledge, skills, and abilities to effectively perform the responsibilities of the position.

Certifications, Licenses, Registrations:

- Possession of a valid State of Florida driver's license.
- Completion of FEMA Emergency Management Institute training courses within twenty-four months of hire. Required courses include IS-100.B Introduction to Incident Command System (ICS-100), IS700.B: An Introduction to the National Incident Management System (NIMS) and IS-200.C: Basic Incidents Command System for Initial Response.
- Utility Customer Relations certificate (FWPCOA or equivalent) preferred.
- Professional certification such as PHR (Professional in Human Resources) or SHRM-CP/SHRM-SCP (Society for Human Resource Management Certified Professional/ Senior Certified Professional) is preferred.
- Americans with Disabilities Act (ADA) certification.

Knowledge, Skills & Abilities:

- Comprehensive knowledge of human resource principles, practices, and procedures.
- Knowledge of grammar, style, business writing, and modern formatting standards.
- Knowledge of how to operate office equipment such as computers, scanners, telephones, calculators, fax machines, postage machines, etc.
- Advanced proficiency in MS Word, Outlook, Excel, PowerPoint, and Adobe Acrobat.
- Excellent organizational skills and attention to detail.
- Ability to present ideas and communicate effectively, orally and in writing.
- Ability to work in a fast-paced environment within an executive-level setting that demands sensitivity to confidential matters.
- Ability to organize and prioritize work to meet time constraints.
- Ability to work effectively at all organizational levels.
- Ability to analyze and solve administrative problems and render advice and assistance.



PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to sit, talk, hear, and use hands to finger, handle, or feel. The employee is frequently required to walk and reach with hands and arms. The employee is occasionally required to stand and stoop, kneel, and crouch. The employee may lift and/or move up to 10 lbs. Specific vision abilities required by this job include close vision and ability to adjust focus. The noise level in the environment is usually moderate.

DISCLAIMER

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TITLE: Customer Service Representative II
JOB CODE: 3008
GRADE: 105
DEPARTMENT: Utilities
REPORTS: Director of Office Administration or Designee
FLSA STATUS: Non-Exempt
CLASSIFICATION: Essential
CREATION DATE: July 12, 2022
REVISION DATE(S): January 9, 2024, 2025

This position is Essential and is required to report to duty before, during, and immediately after a declared storm event.

POSITION SUMMARY

Under general supervision performs customer service and clerical duties to assist in the operation of the District's Utilities Department. Work involves answering calls, processing mail, utility connection documents, customer payments, deposits, processing account information, refunds, service orders, and assist with other administrative tasks.

DUTIES & RESPONSIBILITIES

The following duties are illustrative for this position. The omission of specific duties does not exclude them from the classification if the work is similar, related, or a logical assignment for this classification. Other duties may be required and assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. Essential functions indicated with an *.

- Provides customer service by taking immediate action to incoming requests, maintaining high levels of quality and productivity and generating innovative solutions to work processes. *
- Provides information in person, by telephone and e-mail to customers and members of the public regarding services, rules & regulations, fees, policies, and procedures. *
- Ensure that appropriate actions are taken to answer customer questions, concerns or transfer calls to appropriate staff for resolution. *
- Accepts changes and makes necessary modifications to customer utility accounts in the billing software. *
- Assists customers with billing questions and researches the billing software to collaborate with billing staff to resolve any inconsistencies in customers' accounts. *



- Receives and processes applications for new customers and completes the termination process according to the different types of accounts and services. *
- Assists utility customers with payment options online and on phone systems. *
- Create letters to customers for all processes. *
- Completes balance transfers when collecting monies owed to the District. *
- Processes customer utility payments and issues receipts according to policies and procedures. *
- Receives daily mail and processes customer correspondence and distributes other mail accordingly. *
- Initiates, processes, and schedules service orders for all divisions. *
- Initiates and dispatch calls to field personnel. *
- Assists with district and customer records according to the State of Florida General Records Schedule GS1-SL and GS-14.
- Assists the billing staff with clerical tasks.
- Serves as back up for administrative duties related to on-call and locates.
- Attend meetings as needed.

MINIMUM REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- Requires a high school diploma or GED equivalent with two to three years of experience in customer service, billing software, and administrative work or any equivalent combination of education and experience that provides the required knowledge skills and abilities to perform this job.
- Requires one year of actual Utilities Customer Service experience.

Certifications, Licenses, Registrations:

- Possession of a valid State of Florida driver's license.
- Possession of Utility Customer Relations Level I certification (FWPCOA or equivalent).

Knowledge, Skills & Abilities:

- Excellent communication skills including active listening.



- Excellent interpersonal and customer service skills.
- Excellent organizational skills and attention to detail.
- Ability to understand and follow oral and written directions of office procedures.
- Ability to maintain calm in pressure situations and adapt quickly to change.
- Ability to communicate in a courteous and professional manner during challenging customer situations.
- Ability to create and edit documents in Microsoft Office Suite, Word, Excel, and other related software.
- Ability to access, input and retrieve information from a computer.
- Ability to make mathematical calculations with reasonable speed and accuracy.
- Ability to operate a variety of automated office machines including computers, copiers, scanners, calculators, postage machines, etc.
- Ability to establish and maintain effective working relationships with employees and the public.

PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to sit, talk, hear, and use hands to finger, handle, or feel, reach with hands and arms. The employee is required to sit most of the time but occasionally is required to walk, stand, stoop, and crouch for brief periods of time. The employee may lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus. The noise level in the environment is usually moderate.

DISCLAIMER

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TITLE: Customer Service Representative Lead

JOB CODE: 3009

GRADE: 106

DEPARTMENT: Utilities

REPORTS: Director of Office Administration or Designee

FLSA STATUS: Non-Exempt

CLASSIFICATION: Essential

CREATION DATE: July 12, 2022

REVISION DATE(S): January 9, 2024, 2025

This position is Essential and is required to report to duty before, during, and immediately after a declared storm event.

POSITION SUMMARY

Under general supervision performs customer service and clerical duties to assist in the operation of the District's Utilities Departments. Work involves answering calls, processing mail, utility connection documents, customer payments, deposits, processing account information, refunds, service orders, training staff, and assistance with other tasks. Maintains office records according to records management guidelines.

DUTIES & RESPONSIBILITIES

The following duties are illustrative for this position. The omission of specific duties does not exclude them from the classification if the work is similar, related, or a logical assignment for this classification. Other duties may be required and assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. Essential functions indicated with an *.

- Provides customer service by taking immediate action to incoming requests, maintaining high levels of quality and productivity and generating innovative solutions to work processes. *
- Provides information in person, by telephone and e-mail to customers and members of the public regarding services, rules & regulations, fees, policies, and procedures. *
- Ensure that appropriate actions are taken to answer customer questions, concerns or transfer calls to appropriate staff for resolution. *
- Accepts changes and makes necessary modifications to customer utility accounts in the billing software. *
- Assists customers with billing questions and researches the billing software to collaborate with billing staff to resolve any inconsistencies in customers accounts. *



- Receives and processes applications for new customers and completes the termination process according to the different types of accounts and services. *
- Assists utility customers with payment options online and on phone systems. *
- Creates letters to customers for all processes related to customer service and assists with utility billing letters. *
- Completes balance transfers and collects monies. *
- Processes customer utility payments and issues receipts according to policies and procedures. *
- Receives daily mail and processes customer correspondence and distributes other mail accordingly. *
- Initiates, processes, and schedules service orders for all divisions. *
- Initiates and dispatch calls to field personnel. *
- Trains new customer service employees on multiple applications related to billing software, customer service and office procedures. *
- Maintains and coordinates destruction of district and customer records according to the State of Florida General Records Schedule GS1-SL and GS-14. *
- Maintains master letters in the billing software for automatic printing. *
- Assists the billing staff with clerical tasks.
- Serves as back up for administrative duties related to on-call and locates.
- Attend meetings as needed.

MINIMUM REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- Requires a high school diploma or GED equivalent with two to three years of experience in customer service, billing software, and administrative work or any equivalent combination of education and experience that provides the required knowledge skills and abilities to perform this job.
- Requires five years of actual Utilities Customer Service experience.

Certifications, Licenses, Registrations:

- Possession of a valid State of Florida driver's license.



- Requires a Utility Customer Relations certification Level II (FWPCOA or equivalent).
- Possession of a Utility Customer Relations Level III certification is preferred (FWPCOA or equivalent).
- Requires the completion of Records Management Training by the Department of State within one year of service.

Knowledge, Skills & Abilities:

- Excellent communication skills including active listening.
- Excellent interpersonal and customer service skills.
- Excellent organizational skills and attention to detail.
- Ability to understand and follow oral and written directions of office procedures.
- Ability to maintain calm in pressure situations and adapt quickly to change.
- Ability to communicate in a courteous and professional manner during challenging customer situations.
- Ability to create and edit documents in Microsoft Office Suite, Word, Excel, and other related software.
- Ability to access, input and retrieve information from a computer.
- Ability to make mathematical calculations with reasonable speed and accuracy.
- Ability to operate a variety of automated office machines including computers, copiers, scanners, calculators, postage machines, etc.
- Ability to establish and maintain effective working relationships with employees and the public.
- Ability to create and update detailed work procedures for the Division.

PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to sit, talk, hear, and use hands to finger, handle, or feel, reach with hands and arms. The employee is required to sit most of the time but occasionally is required to walk, stand, stoop, and crouch for brief periods of time. The employee may lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus. The noise level in the environment is usually moderate.

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TITLE: Utilities Billing Specialist Lead

JOB CODE: 3011

GRADE: 109

DEPARTMENT: Utilities

REPORTS: Director of Office Administration or Designee

FLSA STATUS: Non-Exempt

CLASSIFICATION: Essential

CREATION DATE: 2025

REVISION DATE(S):

This position is Essential and is required to report to duty before, during, and immediately after a declared storm event.

POSITION SUMMARY

Under general supervision this position is responsible for all utility billing and meter reading functions to ensure accuracy and timely billing. Other responsibilities include reconciling customer payments and accounting records, identifying and troubleshooting any inconsistencies, managing service requests, developing analyses and reporting for staff and management as required. This position will also play a key role when new software is implemented related to the district's billing systems and is responsible for addressing any difficult inquiries from customers related to billing or payment issues.

DUTIES & RESPONSIBILITIES

The following duties are illustrative for this position. The omission of specific duties does not exclude them from the classification if the work is similar, related, or a logical assignment for this classification. Other duties may be required and assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. Essential functions indicated with an *.

- Responsible for accurately preparing monthly utility bills and other related bills and notices including final bills, and past due notices; to ensure bills and notices are mailed in a timely manner. *
- Manages the billing software and coordinates training related to billing, service orders, and meter reading. *
- Performs daily cash processes by reviewing daily deposit receipts for accuracy, depositing funds into accounts, and submitting documents to the Finance Department. *
- Manages the meter reading process ensuring uploading and downloading reads, scheduling and preparing devices for meter reading, coordinating and reviewing meter reading, system performance and incoming reads are recorded accurately. *
- Address any issues that may arise during meters reading. Coordinate with staff and vendors to correct issues promptly avoiding any errors or delays in billing calculations. *



- Runs data pull reports for verification of meter usage within the meter software to monitor uploads reads into the billing system. *
- Review and address AMI leak notifications with management and vendor(s) to ensure customers are notified of leaks and create service orders as needed. *
- Assist with changes in billing systems or software upgrades. *
- Performs data entry of all meter inventory, meter exchanges, and new installations in the billing system. *
- Performs shut-off calls for delinquent accounts and coordinates the shut-off process with the assistance of utility billing, customer service and underground utilities staff. *
- Runs the lock-off register to shut off services for all customers with delinquent accounts.
- Follows delinquent payment plans according to district procedures to collect and secure payments from delinquent customers. *
- Reviews customer's contesting charges request prior to approval by following District rules and management's direction. *
- Maintains and processes the automatic bank draft file (ACH) and submits to the bank each billing cycle. *
- Reviews customers' closed accounts to perform refund checks, and balance transfers according to district policies. *
- Performs necessary transaction adjustments related to customer accounts, including but not limited to issues within the utility billing, meter reads, account receivable batches, payment collections and arrangements. *
- Advises the Utilities Director of applications received for new commercial connections and collaborates with staff and business owners to obtain various documents related to new construction or ongoing projects assisting with the calculation of ERC's, meter fees, and deposits to collect and process the appropriate fees prior to establishing new locations in the billing software. *
- Prepares the month end process and runs reports for various utility rate codes to ensure accuracy and to balance bank deposits, then generates other reports as requested by management, finance department, and the board by utilizing report writing tools in the billing software and/or other report writers available. *
- Works with management to process rate changes within the billing software after board approval and tests all rates prior to billing. *
- Processes and reconciles various types of payment methods for all accounts receivable. *
- Receives, research, and processes returned checks, credit cards or online payments by recording returned items, reversing payments, sending notifications to customers, and following up with banks or credit card merchant(s) to ensure resolution of any discrepancies. *
- Serves as back up for other billing and customer service staff as needed. *



- Works with supervisor to research and collect information on internal or operational procedures to find better solutions. *
- Works with auditors to answer inquiries on customer accounts, billing transactions, and to provide financial records and reports, as requested and prepare records according to the retention schedule*
- Collaborates with the underground utilities staff to ensure coordination of meter readings and other tasks are performed prior to the bill date. *
- Serves as the in-house expert working as a liaison between the vendor and district staff; troubleshooting issues related to the utility billing software and notifying other staff of any corrections, updates or changes in software procedures and/or login information. *
- Regularly attends training in billing related software to develop understanding of all aspects of utility billing and to share training with other employees as required. *
- Coordinates and tests billing system upgrades and other utility programs that rely on the billing software to ensure accurate results of any corrections or revisions during upgrades. *
- Receives and responds to staff and customer inquiries on billing, meter readings, payment issues and other customer account concerns. *
- Uses databases and software programs to prepare and compile documents, spreadsheets and at times historical billing data to respond to staff and customer inquiries. *
- Maintains and resolves customer bankruptcy issues. *

MINIMUM REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- Requires a high school diploma or GED equivalent with five years of experience in accounting, billing software, customer service, and administrative work or any equivalent combination of education and experience that provides the required knowledge skills and abilities to perform this job.



Certifications, Licenses, Registrations:

- Possession of a valid State of Florida driver's license.
- Must Possess a Utility Customer Relations Level I certification upon hire (FWPCOA or equivalent).
- Completion of a Utility Customer Relations Level II certification within twenty-four months of hire.

Knowledge, Skills & Abilities:

The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

- Thorough knowledge of accounting, utility billing rules, practices, and procedures.
- Excellent communication skills including active listening.
- Excellent interpersonal and customer service skills.
- Excellent organizational skills and attention to detail.
- Ability to exercise independent judgment and problem-solving skills.
- Ability to understand and follow oral and written directions of billing procedures.
- Ability to access, create, and edit documents in Microsoft Office Suite, Word, Excel, and other related software.
- Ability to prepare financial reports and the ability to make mathematical calculations with reasonable speed and accuracy.
- Ability to work under pressure and meet deadlines in a fast-paced and at times stressful environment.
- Ability to communicate with challenging customers and situations in a courteous and professional manner.
- Ability to operate a variety of automated office equipment including computers, copiers, scanners, calculators, postage machines and other equipment as needed.
- Ability to establish and maintain effective working relationships with employees, vendors, civic or governmental leaders, and the public.
- Ability to organize and prioritize multiple tasks to complete projects in an effective and timely manner.
- Ability to attend conferences, seminars, and classes as appropriate to enhance and maintain knowledge of trends and developments in the utility billing field.



PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to sit, talk, hear, and use hands to finger, handle, or feel, reach with hands and arms. The employee is required to sit most of the time but occasionally is required to walk, stand, stoop, and crouch for brief periods of time. The employee may lift and/or move up to 10 lbs. Specific vision abilities required by this job include close vision and ability to adjust focus. The noise level in the environment is usually moderate.

DISCLAIMER

This job description is not an employment agreement or contract. Management has the exclusive right to alter this job description at any time without notice except when a policy revision is needed, in these cases the job description must go to the Board of Supervisors for approval.



TITLE: Human Resources Assistant
JOB CODE: 3012
GRADE: 107
DEPARTMENT: Utilities/Public Works
REPORTS: Human Resources Manager or Designee
FLSA STATUS: Non-Exempt
CLASSIFICATION: Essential
CREATION DATE: 2025
REVISION DATE(S):

This position is Essential and is required to report to duty before, during, and immediately after a declared storm event.

POSITION SUMMARY

Under supervision of the Human Resources Manager, the Human Resources (HR) Assistant provides administrative support to the HR department, ensuring efficient and smooth daily operations. This role is responsible for maintaining employee records, assisting with recruitment and onboarding processes, supporting employee relations initiatives, and helping with benefits administration, payroll processing, and compliance with company policies and employment laws. Strong organizational skills, attention to detail, and the ability to handle confidential information with discretion are essential for success in this role.

DUTIES & RESPONSIBILITIES

The following duties are illustrative for this position. The omission of specific duties does not exclude them from the classification if the work is similar, related, or a logical assignment for this classification. Other duties may be required and assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. Essential functions indicated with an *.

- Assist with job openings, job postings, and application tracking.*
- Assists in conducting background checks and verifying employment eligibility (I-9 and E-Verify).*
- Assists in new hire orientation and onboarding activities.*
- Assists in group benefit tasks.*
- Prepares and distributes performance skills evaluations (90-day & annual).*
- Assists in payroll software operations, including updating employee records and troubleshooting minor payroll issues. *



- Assists in addressing employment-related inquiries from employees.*
- Assists with processing paperwork related to employee transfers and separations.*
- Assists in claim processing for general liability and workers compensation.*
- Assist with tasks related to the asset management program.*
- Assists with tasks related to the incident report program. *
- Assists with tasks related to the travel & training program.*
- Maintain and update the employee database.*
- Assist in maintaining HR policies, procedures, and forms.*
- Assist in maintaining employee records and confidential files.*
- Perform clerical and administrative duties, including letters, memos, and reports.*
- Assist in ordering office supplies.*
- Maintain the master calendar for district events.*
- May serve as Accounts Payable Coordinator backup.

MINIMUM REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- High school diploma or GED equivalent.
- Four years of experience in administrative work and
- Two years' experience in Human Resources preferred.

Certifications, Licenses, Registrations:

- Possession of a valid State of Florida driver's license.
- Professional certification such as PHR (Professional in Human Resources) or SHRM-CP (Society for Human Resource Management Certified Professional) is preferred.
- Utility Customer Relations Level 1 certificate (FWPCOA or equivalent) preferred.

**Knowledge, Skills & Abilities:**

- Comprehensive knowledge of human resource principles, practices, and procedures.
- Knowledge of grammar, style, business writing, and modern formatting standards.
- Knowledge of how to operate office equipment such as computers, scanners, telephones, calculators, fax machines, postage machines, etc.
- Advanced proficiency in MS Word, Outlook, Excel, PowerPoint, and Adobe Acrobat.
- Excellent organizational skills and attention to detail.
- Ability to present ideas and communicate effectively, orally and in writing.
- Ability to work in a fast-paced environment within an executive-level setting that demands sensitivity to confidential matters.
- Ability to organize and prioritize work to meet time constraints.
- Ability to work effectively at all organizational levels.
- Ability to analyze and solve administrative problems and render advice and assistance.

PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to sit, talk, hear, and use hands to finger, handle, or feel. The employee is frequently required to walk and reach with hands and arms. The employee is occasionally required to stand and stoop, kneel, and crouch. The employee may lift and/or move up to 10 lbs. Specific vision abilities required by this job include close vision and ability to adjust focus. The noise level in the environment is usually moderate.

DISCLAIMER

This job description is not an employment agreement or contract. Management has the exclusive right to alter this job description at any time without notice except when a policy revision is needed, in these cases the job description must go to the Board of Supervisors for approval.

**AMENDMENT V TO CHAPTER A-III, OPERATING POLICIES AND PROCEDURES
OF ST. LUCIE WEST SERVICES DISTRICT**

**POSITIONS, QUALIFICATIONS, COMPENSATION, EMPLOYMENT, AND
TERMINATION OF DISTRICT EMPLOYEES**

A-III: 1.01 PURPOSE. The purpose is to amend certain Operating Policies and Procedures of St. Lucie West Services District that relate to the employment and termination of employees; and to provide an effective date.

Specific Authority: §§190.011(5), Fla. Stat.

Law Implemented: §§190.007, 190.011(5), Fla. Stat.

History: Adopted August 1, 2006; revised November 20, 2007, April 2, 2013, December 5, 2017; July 12, 2022; **July 8, 2025**

A-III: 1.02 NECESSITY. This amendment to the Operating Policies and Procedures is necessary to clarify the roles and responsibilities of the Board of Supervisors and the District Manager in determining the employment and termination of District employees.

Specific Authority: §§190.011(5), Fla. Stat.

Law Implemented: §§190.007, 190.011(5), Fla. Stat.

History: Adopted August 1, 2006; revised November 20, 2007, April 2, 2013, December 5, 2017; July 12, 2022; **July 8, 2025**

A-III: 1.03 AMENDMENT. Chapter A-III of the District's Operating Policies and Procedures, St. Lucie West Services District, Positions, Qualifications, Compensation, Employment, and Termination, shall be revised to read as follows:

* * *

A-III 1.04 EFFECTIVE DATE. This amendment of the Operating Policies and Procedures shall become effective upon its approval by the Board of Supervisors of the St. Lucie West Services District.

Specific Authority: §§190.011(5), Fla. Stat.

Law Implemented: §§190.007, 190.011(5), Fla. Stat.

History: Adopted August 1, 2006; revised November 20, 2007, April 2, 2013, December 5, 2017; July 12, 2022; July 8, 2025

Approved by Board of Supervisors: July 8, 2025

ST. LUCIE WEST SERVICES DISTRICT CHAPTER A-III

POSITIONS, QUALIFICATIONS, COMPENSATION, EMPLOYMENT, AND TERMINATION OF DISTRICT EMPLOYEES

SECTION 1. DEFINITIONS

~~As used in this policy:~~

~~(a) The term “high-ranking employees” shall mean and include individuals holding the District positions of Public Works Director/Assistant District Manager, Utility Director/Assistant District Manager, Assistant Public Works Director, Assistant Utility Director, Director of Office Administration, Human Resources Specialist, Chief Water Treatment Plant Operator, and Chief Wastewater Treatment Plant Operator.~~

~~(b) The term “non-high-ranking employees” shall mean and include individuals holding all District positions except those designated as high-ranking employees.~~

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SECTION 21. DISTRICT MANAGER RESPONSIBILITY AND AUTHORITY

The District Manager shall be responsible for:

(a) As to all District employees and positions:

(1) Recommending to the Board of Supervisors written job descriptions setting forth the duties, responsibilities, and qualifications of all District employee positions.

(2) Recommending to the Board of Supervisors the levels of compensation and benefits for all District employee positions and employees.

~~(b) As to non-high-ranking employees:~~

~~(3)~~ Advertising open positions, interviewing applicants, and hiring or promotion of individuals to fill all ~~non-high-ranking~~ positions at rates of pay consistent with the compensation and benefit levels established for such positions.

~~(2)~~ Undertaking discipline, including suspension with or without pay and/or termination when appropriate, of ~~non-high-ranking~~ employees whose conduct merits such action.

~~(e)(b) As to high ranking employees:~~

~~(1) Advertising open positions, interviewing applicants, and presenting in writing to the Board of Supervisors nominations for the hiring or promotion of individuals to fill all high ranking positions at rates of pay consistent with the compensation and benefit levels established for such positions.~~

~~(2) Undertaking discipline, including suspension with or without pay when appropriate, of high ranking employees whose conduct merits such action; provided, however, that termination of any high ranking employee shall require (i) a written recommendation from the District Manager to the Board of Supervisors specifying the misconduct warranting termination, and (ii) an affirmative vote, by a majority of the Board of Supervisors present and voting on such recommendation, approving termination.~~

SECTION 3. BOARD RESPONSIBILITY AND AUTHORITY

The Board of Supervisors shall be responsible for:

(a) As to all District employees and positions:

(1) Reviewing the recommendations of the District Manager and adopting written job descriptions setting forth the duties, responsibilities, and qualifications of all District employee positions.

(2) Reviewing the recommendations of the District Manager and adopting levels of compensation and benefits for all District employee positions and employees.

~~(b) As to high ranking employees:~~

~~(1) Reviewing each written nomination by the District Manager for the hiring or promotion of an individual to fill a high ranking position, and (i) approving the nomination as presented by the District Manager, (ii) approving the nomination presented by the District Manager, subject to modification of the proposed rate of pay consistent with the compensation and benefit levels established for such position, or (iii) rejecting the nomination presented by the District Manager, in which event the District Manager shall promptly present to the Board of Supervisors another nomination for consideration.~~

~~(2) — Reviewing each written recommendation of the District Manager for the termination of a high ranking employee and determining, by an affirmative vote of a majority of the Board of Supervisors present and voting on such recommendation, whether to approve termination.~~

SECTION 4. COLLECTIVE BARGAINING AGREEMENTS

Any provision of a collective bargaining agreement that is ratified by the Board of Supervisors and affects members of a collective bargaining unit shall prevail over any provision of this chapter in conflict with such agreement. The conflicting provision shall be deemed amended during the term of the agreement.

Specific Authority: §§120.54, 190.011(5), Fla. Stat.

Law Implemented: §§120.54, 190.007, 190.011(5), Fla. Stat.

History: Adopted August 1, 2006; revised November 20, 2007, April 2, 2013, December 5, 2017, July 12, 2022

* * *

St. Lucie West Services District
Board Agenda Item
Tuesday, July 8, 2025

Item

DA 1 Status Report/Updates

Summary

This report is provided for your review and information.

Recommendation

Budget Impact

Project Number:	Available Project Budget: \$0.00
ORG Number:	This Project: \$0.00
	Available Balance: \$0.00

Board Action

Moved by:	Seconded by:	Action Taken:
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JOHN J. FUMERO
*Board Certified State & Federal Government
& Administrative Practice Lawyer*

E-MAIL ADDRESS:
jfumero@nasonyeager.com

OFFICE:
(561) 982-7114

FAX NUMBER:
(561) 982-7116

CELL:
(561) 315-4595

June 20, 2025

St. Lucie West Services District
District Attorney's Report
Time Period May 20, 2025 — June 19, 2025

As SLWSD Counsel for the time period identified above, I and my team completed the following matters:

Completed Work:

- 1) Attendance at Regular Board Meeting for June 3, 2025.
- 2) Participated in meeting to review SLWSD water and wastewater utility and stormwater management infrastructure.
- 3) Prepared liability release form for person touring the District property/facilities
- 4) Somerset SLWSD Abandonment - Reviewed and approved Michelle Sullivan's abandonment document for Board execution
- 5) Ethics Form 1 Filing - Identified clients requiring Form 1 financial disclosure filings with Florida Ethics Commission, including SLWSD
- 6) PGA Village Golf Course Agreement Renewal - Drafted amended and restated irrigation agreement with updated country club legal entity, rates, Force Majeure provision, venue clause, and sovereign immunity clause
- 7) Review of ISS contract to confirm that District may proceed with RFP or RFQ process based on change in ownership
- 8) 300 NW Peacock Blvd Deed Restriction Release - Coordinated with Nat Nason and revised termination document for property sale to City of Port St. Lucie

9) 2024 Audit Inquiry Response - Prepared and finalized audit response letter clarifying no pending litigation claims

10) City of Port St. Lucie 1E Easement Agreement – received some edits from Gerard, and Steve provided comments back

In addition, we have the following items in work as of June 19th:

Pending Work:

11) Draft Construction Interlocal Agreement with City - First draft completed but likely needs technical input and further development

12) Lien Resolution - Need to prepare recordable satisfaction of lien for residence trying to sell with 2021 Board-approved lien conflict (received June 18)

13) School Board Interlocal agreement for stormwater facilities and equipment maintenance – Steve recalled the June 18th draft because John Fumero provided redline edits and suggestions for the Exhibits that need to be discussed with Gerard

14) Performing top-down review of District's General and Procedural Employment Rules to separate those that require a resolution and public notice prior to being changed and those that can be changed as a purely ministerial function.

Sincerely,

/s/ John J. Fumero
John J. Fumero, Esq.
For the firm

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2023

Item

DE 1 **Status Report/Updates**

Summary

This report is provided for your review and information.

Recommendation

Budget Impact

Project Number:

Available Project Budget: \$0.00

ORG Number:

This Project: \$0.00

Available Balance: \$0.00

Board Action

Moved by:

Seconded by:

Action Taken:

Client: St. Lucie West Services District

Topic: Monthly Project Status Report – July 8, 2025

Date of Status: 6/20/2025

1) General

- i) SLWSD and ISS have regular telecons and meeting discussions that are incorporated in the project statuses below.
- ii) SLWSD to communicate with ISS to provide direction and updates on IRSC and Reserve CDD projects.

2) SLW 018 Stormwater Review

- i) Status: ISS has received requests for development reviews for the following:
 - a. Cashmere Starbucks
 - b. Canopy Walk
- ii) Action
 - a. District Engineer Discussion / Consideration of Canopy Walk Site Development Plan - SLWSD Engineer to discuss approval procedures with owner- developer – agent.

3) SLW034 Reserve CDD Engineering Evaluation

- i) Status:
 - a. SLWSD Board approved the Task Order at their meeting on July 8, 2024.
 - b. ISS submitted a Preliminary Evaluation Report on Oct 11, 2024.
 - c. ISS submitted a draft Final Evaluation Report on Nov 19, 2024.
 - d. ISS attended the SLWSD Board meeting on Dec 3, 2024 and presented the Report.
- ii) Actions:
 - a. SLWSD and Reserve CDD Boards initiating negotiations for SLWSD to combine the Reserve system into the SLWSD system.
 - b. ISS is on standby for question responses or additional Final Report comments from those negotiations. SLWSD staff to review and provide any comments on the draft report prior to ISS producing the final document.

4) SLW035 DIW Civil/Site and Piping Improvements

- i) Status:
 - a. ISS has submitted 60% Design Drawings to the District for review and comments on June 17th, 2025.
- ii) Actions:
 - a. District and Hydrogeologist to review and provide comments on 60% Design Drawings
 - b. Once comments are received, ISS will meet with all parties to discuss comments and subsequent project steps.

5) SLW036 – Water Treatment Plant Expansion Design Build Criteria Professional Services

i) Status:

- a. ISS received Notice to Proceed on April 9, 2025
- b. ISS has started to compile existing data and develop our internal work plans
- c. Project Kickoff meeting with staff has been scheduled for June 24, 2025

ii) Actions:

- a. ISS to schedule site survey work.

6) SLW041 Stormwater Infrastructure Engineering Evaluation

i) Status:

- a. The District provided a signed Task Order dated May 23rd, 2025
- b. ISS Team met internally to kickoff project on June 9th, 2025 and discuss project tasks as indicated in the approved Task Order.
- c. ISS has began Data Analysis Services consistent with Task 1 and intends to schedule a meeting with the District to discuss the control structures, findings to-date, and subsequent steps moving forward to Task 2

ii) Actions:

- a. ISS and SLWSD to initiate a meeting to discuss control structures, findings to-date, and next steps.

7) Other

8) At SLWSD's request, ISS is in the process of preparing the following District System Future Task Orders:

- a) Update Utility Standards - Future
- b) WTP Onsite Potable Storage Assessment - Future
- c) Concept Design & Cost Estimate for the WWTF Third Train - Future
- d) WWTF Grease Collection System - Future
- e) SLWSD System Wide Irrigation Modeling (10 HOAs_±) – Future
- f) System Engineer's Audit Report - July 2025



St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

DM 1 District Manager and Staff Prescriptive Goals and Performance Objectives for FY 2026

Summary

Condition 13 of the District Manager's Employment Agreement stipulates that the District Manager recommends prescriptive goals and performance objectives for the District Manager and Staff to achieve or work towards each year.

This item was tabled at the June 3, 2025 meeting due to some additions requested by the board.

Attached for your review and comments are the recommended goals and objectives for FY 2026.

Recommendation

Staff recommends approval of the District Manager's Goals and Objectives for FY 2026.

District Manager: Joshua C Miller

Public Works Director/ Assistant District Manager: Gerard Rouse

Budget Impact

Project Number:

Available Project Budget: \$0.00

ORG Number:

This Project: \$0.00

Available Balance: \$0.00

Board Action

Moved by:

Seconded by:

Action Taken:



St. Lucie West Services District

450 SW Utility Drive, Port St. Lucie, FL 34986

Tel: (772)340-0220 Fax: (772)871-5771

www.slwsd.org

July 8, 2025

Honorable Dominick Graci, Chairman and
Members of the Board of Supervisors
St. Lucie West Services District
450 SW Utility Drive
Port St. Lucie, FL 34986

RE: District Manager Goals & Objectives for Fiscal Year 2026

Dear Honorable Chairman and Supervisors,

Condition 13 of the District Manager's Employment Agreement stipulates that the District Manager recommends prescriptive goals and performance objectives for the District Manager and Staff to achieve or work towards each year.

- A Fiscal Year-End Report (FYR) describing whether these Goals and Objectives have been met will be provided to the Board of Supervisors along with the District Manager Annual Evaluation at the end of each FY.
- Includes new programs: Employee Recognition Program & Cost Savings Sharing Program

Please accept the recommended goals and objectives for FY2026.

Joshua C Miller
District Manager

District & Staff Goals:

- **Provide Timely and Accurate Board Meeting Agendas**

- Ensure all documents are clear, legible, and concise.
- Try to avoid walk-on action items.
- Advertised properly according to FLA Statute

FYR- to include the amount of workshop and board meeting agendas published during the FY, any missed agendas and why, and any public feedback relating to the content, format, or public access to such agendas.

- **Maintain the General Fund & Utility Fund at or Below Budget**

- Ensure budget planning sessions are held with each division throughout the year to keep track of expenditures and to plan for Capital Improvements.

FYR- to include the status of the FY budget, the amount of budget workshops and amendments during the FY. It will also include why the amendments were made.

- **Maintain the General Fund R&R & Utility Fund R&R Funds**

- Ensure budget planning sessions are held with each division throughout the year to keep track of repair and replacement needs and to plan for other infrastructure needs.
- The Utility R&R Fund is required by the Bond Indenture and should be funded accordingly. This Fund is projected to be funded for the foreseeable future.
- The General Fund R&R Fund was created in 2013 to assist in tracking Stormwater R&R Projects. This Fund is funded annually with a minimum of 5.0% from the Non-Ad Valorem Maintenance Assessment. This Fund is projected to be funded for the foreseeable future.

FYR- to include the status of the FY R&R Funds, the number of staff planning sessions that occurred, bond indenture requirements and/or changes, and any possible foreseeable changes.

- **Succession Planning and Mentor Program**

- Ensure assistants and other employees are properly trained so that the District may continue to operate as needed when an employee retires or is no longer employed.
- Ensure proper employee mentoring for new hires and transfers is performed by Supervisors and senior employees.

FYR- to include the number of personnel replacements due to separation, open positions, and any foreseeable future employee reduction or growth.

- **Provide Supervisory and Safety Training for all Divisions**

- Ensure the required amount of training is performed for continuing education requirements for regulatory licensing.
- Ensure the required amount of ongoing safety training is performed for each division. Some divisions require more than others; the minimum is 6 sessions.
- Continuing memberships with FASD, FRWA, FWPCOA, AWWA, APWA, EGIS and others for training and education.
- Ensure the proper employee policies and guidance documentation is updated and available to the employees and the public.

FYR- to include information of staff training sessions and the type of training completed.

- **Research and Investigate Alternate Funding Options**

- Research Environmental Grant Opportunities for Stormwater Treatment, Enhancement, and Capacity Projects.
- Research Grant Opportunities for Utilities Conservation and Treatment Projects.

FYR- to include any information for grants applied for, the purpose for each grant application, and whether it was acquired.

- **Provide Great Customer Service**

- Ensure fast response times to emergencies within the District.
- Ensure declared storm event staff are available to assist the public.
- Ensure customers are responded to timely and all public records requests requirements are followed.
- Continue to manage public records and documents legally and with transparency.
- Continue training staff on how to interact with customers in person, via email, and on the phone.
- Continue to provide a semi-annual newsletter (July & December) to the utility account holders informing them of system changes and projects.
- Provide educational materials on conservation and stormwater.
- Continue to host scheduled HOA and Presidential Council Meetings.
- Provide Public Meetings for educational updates concerning District operations and projects.

FYR- to include the number of HOA & Presidents Council Meetings, or other public informational meetings attended by SLWSD Staff. The number of public notices distributed including newsletters, any outages or boil water events.

- **Maintain Capital Assets Program**

- Continue to maintain all buildings, structures, and equipment in a cost effective and timely fashion.
- Continue to gather and store operational redundancy items as needed.

FYR- to include any major infrastructure improvements or surplus items.

- **NEW District Cost Savings Sharing Program**

- Implement a cost savings program and track budget savings for each division and department.

To be presented at the December Annual Meeting, we will include the FY Budget savings for each division, and each department.

- **NEW Employee Recognition Program**

- Implement an employee recognition program for outstanding employees that shall be recognized on an annual basis.

To be presented at the December Annual Meeting- we will present Employee of the Year and Leadership Awards.

District & Staff Objectives:

- **Incorporation of the Reserve CDD (FY2026 & FY2027)**

- Ensure all SLWSD Utility Standards are met prior to incorporating as retail customers.
- Provide enough SLWSD staff for the increased service area.
- Ensure SLWSD Customers are not neglected due to their incorporation.

- **Water Treatment Plant Redundancy Improvements (FY2026 & FY2027)**

- Complete installation of Injection well #2.
- Complete water treatment plant improvements.
- Closeout UT Revenue Series 2024 Bonds.

- **Stormwater Projects to be considered**

- Investigate and plan the completion of the remaining Post Office Ditch.
- Continue to investigate and plan mitigation and upgrades to intake and outfall structures that may need fortification.
- Consider stormwater capacity improvements to other areas like the Wetland #1 Project.
- Evaluate existing water management tracts, wetlands, and upland pine preserves to determine value of use.

FYR- All projects are to include the purpose for the project, budget impact, and public benefit.

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

DM 2 District Manager FY2025 Year End Report

Summary

Condition 13 of the District Manager's Employment Agreement stipulates that the District Manager recommends prescriptive goals and performance objectives for the District Manager and Staff to achieve, or work towards each year.

For your acceptance is the Fiscal Year-End Report (FYR) for FY2025 describing whether these Goals and Objectives have been met.

Recommendation

Staff recommend the acceptance of the District Manager's FY2025 Year End Report.

District Manager: Joshua C Miller

Public Works Director/ Assistant District Manager: Gerard Rouse

Budget Impact

Project Number:

Available Project Budget: \$0.00

ORG Number:

This Project: \$0.00

Available Balance: \$0.00

Board Action

Moved by:

Seconded by:

Action Taken:



St. Lucie West Services District

450 SW Utility Drive, Port St. Lucie, FL 34986

Tel: (772)340-0220 Fax: (772)871-5771

www.slwsd.org

July 8, 2025

Honorable Dominick Graci, Chairman and
Members of the Board of Supervisors
St. Lucie West Services District
450 SW Utility Drive
Port St. Lucie, FL 34986

RE: District Manager Goals & Objectives 2025 Fiscal Year-End Report

Dear Honorable Chairman and Supervisors,

Condition 13 of the District Manager's Employment Agreement stipulates that the District Manager recommends prescriptive goals and performance objectives for the District Manager and Staff to achieve or work towards each year.

- A Fiscal Year-End Report (FYR) describing whether these Goals and Objectives have been met is provided to the Board of Supervisors.

Please accept this Fiscal Year-End Report for FY2025.

Joshua C Miller
District Manager

District & Staff Goals:

- **Provide Timely and Accurate Board Meeting Agendas**
 - All meeting agendas were followed and managed appropriately throughout the year.
 - Walk on “action” items were minimized.
 - All agendas and board books were advertised pursuant to statute.
 - There were no reported complaints or remarks relating to the agendas.
- **Maintain the General Fund & Utility Fund at or Below Budget**
 - Annual Budget Workshop was held with Board in May 2025.
 - Only Amendments made were, UT Related Project Purchase Order Carryover from FY24
 - Directors met with Division Managers regularly relating to budget oversight and projections.
 - Budgets remain within coverage allowances, however, were looked at more closely due to increasing cost of living, labor costs, tariff impacts, and liability insurance.
- **Maintain the General Fund R&R & Utility Fund R&R Funds**
 - Directors’ met with Division Managers regularly throughout the year to keep track of repair and replacement needs and to plan for other infrastructure needs.
 - The Utility R&R Fund is required by the Bond Indenture and was funded accordingly. This Fund is projected to be funded for the foreseeable future.
 - The General Fund R&R Fund was created in 2013 to assist in tracking Stormwater R&R Projects. This Fund was funded with a minimum of 5.0% from the Non-Ad Valorem Maintenance Assessment. This Fund is projected to be funded for the foreseeable future.
- **Succession Planning and Mentor Program**
 - Utilities and Public Works Assistants and Staff were properly trained throughout the year so that the District may continue to operate as needed when an employee retires or is no longer employed.
 - Senior Employees and Staff provided mentoring for new hires and transfers throughout the year.
 - There were 6 Utilities Openings this FY with 4 of them being filled.

- **Provide Supervisory and Safety Training for all Divisions**
 - Each Division has acquired the amount of training for continuing education requirements for regulatory licensing.
 - Each Division has provided the amount of safety training necessary for their position and equipment they may be responsible for operating. Some divisions require more than others; the minimum is 6 sessions.
 - Staff and/or the District have maintained memberships with FASD, FRWA, FWPCOA, AWWA, APWA, EGIS and others for training and education.
 - Proper employee policies and guidance documentation have been updated and are available to the employees and the public.

- **Research and Investigate Alternate Funding Options**
 - Our Engineering Firm has researched Environmental Grant Opportunities for Stormwater Treatment, Enhancement, and Capacity Projects and did not find any this year that fit our district needs.
 - Our Engineering Firm has researched Grant Opportunities for Utilities Conservation and Treatment Projects and did not find any this year that fit our district needs.

- **Provide Great Customer Service**
 - District Staff provided fast response times to emergencies within the District.
 - Dedicated Staff were present for storm events and assisted the public as needed.
 - All customers were responded to timely when needed and all public records requests requirements were completed, and statutes were followed.
 - Staff training was completed on how to interact with customers in person, via email, and on the phone.
 - The hiring of a Public Information Officer has increased newsletters to monthly for the utility account holders informing them of system changes and projects.
 - Education materials on water conservation and stormwater have been provided to the public.
 - Staff have attended all the scheduled Presidential Council Meetings and attended HOA meetings as requested by the public.
 - During the year there were a few scheduled Boil Water Events for scheduled water line repairs in isolated areas.

- **Maintain Capital Assets Program**
 - All buildings, structures, and equipment were maintained in a cost effective and timely fashion.
 - Redundant materials and equipment were gathered and stored as needed.
 - Obsolete Capital Assets were deemed surplus and disposed of according to our policies.

District & Staff Objectives:

- **Complete the District Wide AMI Water Meter Project (FY2024)**
 - This was a carryover project and is 95% completed.
 - Staff have been trained in the new software and customer portal access is in the works.
 - Project has been successful and water conservation has improved.
- **Complete the 4C Stormwater Control Structure Upgrade Project (FY2024)**
 - Stormwater Gate Automation Project was completed in October 2024.
- **Stormwater Projects to be considered**
 - Post Office Ditch Project Phase II is being considered.
 - Intake and Outfall Structures for mitigation and upgrades are currently being investigated by our engineering firm.
 - Evaluated existing water management tracts, wetlands, and upland pine preserves to determine value of use.
- **Water Treatment Plant Upgrades**
 - Acquired Utility Revenue Series 2024 Bonds and closed out Series 2011, 2013, and Series 2014 Bonds.
 - The construction of the new injection well project began.
- **Reserve CDD Interlocal Agreement**
 - Completed the negotiations with the Reserve CDD relating to the existing Interlocal Bulk Service Agreement.
 - Retail Services Agreements have been approved by each Board and have been executed to incorporate Reserve CDD into the SLWSD Service Area.

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

DM 3 Consider Approval of the Fifth Amendment to Utility SCADA System Service Agreement

Summary

Attached for your review and approval is the Fifth Amendment to Utility SCADA System Service Agreement with ISI (Integration Services, Inc).

This amendment extends the current contract for an additional three years. Increases in service costs are being proposed as shown in the 2025 Rate Schedule and all other contract conditions remain the same through September 30, 2028.

The proposed increase of services is the first increase by Integration Services Inc since 2016.

Staff have reviewed the proposed increases and found that they are within budget and recommend approval of this amendment.

Recommendation

Staff recommend approval of the Fifth Amendment to Utility SCADA System Service Agreement with ISI.

District Manager: Joshua C Miller

Public Works Director/ Assistant District Manager: Gerard Rouse

Budget Impact

Project Number:

Available Project Budget: \$0.00

ORG Number:

This Project: \$0.00

Available Balance: \$0.00

Board Action

Moved by:

Seconded by:

Action Taken:

Integration Services, Inc.
Advanced Process Automation

1806 Asher Road
Lakeland FL 33813
www.integration-services.biz

Phone: (863) 647-3133
Fax: (863) 647-3133
isi-support@integration-services.biz

June 18, 2025

To: St. Lucie West Services District
450 SW Utility Drive
Port St. Lucie, FL 33896

Attn: Mr. Josh Miller, District Manager & Utility Director.

Subject: Integration Services, Inc. service and support contract renewal 09/2025.

Mr. Miller

The existing SCADA system services and support contract between St. Lucie West Services District and Integration Services is due to expire at the end of this September.

For the past eighteen years Integration Services has worked diligently to support the district and its initiatives to maintain and expand the utility's SCADA control system. We feel that as a team member we have met all of the presented challenges and opportunities to the satisfaction of District management.

Integration Services considers St. Lucie Service District as one of our prime client accounts and has continually placed the districts concerns and requirements at the top of our priority list. Since the services contract renewal in September of 2016 Integration Services has kept its service rates frozen for services provided to St. Lucie West Services District.

Considering the current economic conditions and labor cost structure changes that have taken place over the past ten years, Integration Services has no choice but to propose labor rate increases to maintain the high-level expertise of services provided. Integration Services would like to offer to the district the opportunity to renew the existing SCADA service and support contract for an additional three years with labor rate increases as defined in the attached labor and expense rates schedule. The labor rates offered are still 15% to 20% below the current market prevailing labor rates.

We are extending this offer in appreciation of our long-term relationship with St. Lucie West Services District and as an example of our commitment to providing high quality engineering and support services to our clients at the lowest possible overall cost.

If you require any additional information or have any questions or concerns, please do not hesitate to contact me at (863) 647-3133.

Sincerely,



Brian K. Callahan
President

FIFTH AMENDMENT TO
UTILITY SCADA SYSTEM
SERVICE AGREEMENT

THIS FIFTH AMENDMENT is made _____, as of 2025 to that certain Utility SCADA System Service Agreement dated as of September 30, 2010 ("Agreement"), by and between the St. Lucie West Services District, a community development district established pursuant to Chapter 190, Florida Statutes ("Customer"), and Integration Concepts, Inc., a Florida corporation ("ICI"), which Agreement was assigned by ICI to Integration Services, Inc., a Florida corporation ("ISI"), by an Assignment and Assumption Agreement dated February 8, 2013 ("Assignment"), as amended by the First Amendment dated October 1, 2013 ("First Amendment"), further amended by the Second Amendment dated October 4, 2016 ("Second Amendment"), further amended by the Third Amendment dated September 10, 2019 ("Third Amendment"), further amended by the Fourth Amendment dated October 1, 2022 ("Fourth Amendment").

RECITALS

A. The Customer has previously consented to the Assignment and recognizes that ISI is to provide all services under the Agreement.

B. The Customer and ISI desire to modify the Agreement by extending its term by a period of three (3) years.

NOW THEREFORE, for and in consideration of the premises, including the mutual understandings and agreements contained in this Fifth Amendment, the Customer and ISI agree to amend the Agreement as follows:

1. All references in the Agreement to Integration Concepts, Inc., are amended to read Integration Services, Inc.

2. The term of the Agreement is modified so that it will remain in force from the date of execution of this Fourth Amendment by the parties until **September 30, 2028**. This Agreement may be modified at any time by mutual written agreement of the parties. Either party may terminate this Agreement by providing 30 days' written notice to the other party.

3. The quoted rates are modified so that Maintenance Services and expenses will be billed and reimbursed according to the attached **2025 Rate Schedule**:

4. The Agreement is modified to include the following public records provisions:

All communications between the parties shall be subject to disclosure in whole or in part under applicable Freedom of Information, Open Records, or Sunshine laws and regulations (collectively "FOIA"). Specifically, parties acknowledge and agree that they are subject to Chapter 119, Fla. Stat., 'relating to the release of public records. ISI meets the definition of "Contractor" as set forth in Section 119.0701, Florida Statutes, ISI shall also:

- (a) Keep and maintain public records that ordinarily and necessarily would be required by the Customer in order to perform the service;
- (b) Provide the public with access to public records on the same terms and conditions that the Customer 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 public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and
- (d) Meet all requirements for retaining public records and upon termination of the Agreement transfer to the Board, at no cost, all public records in possession of the Contractor 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 Board in a format that is compatible with the information technology systems of the Board.

IF ISI HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ISI'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT THE DISTRICT, MADDIE MALDONADO, AT (772) 340-0220, mmaldonado@slwsd.org, 450 S.W. UTILITY DRIVE, PORT ST. LUCIE, FLORIDA 34986.

Except as modified by this Fifth Amendment, the Agreement shall remain in full force and effect.

IN WITNESS WHEREOF, the Customer and ISI have executed or caused this Fifth Amendment to be executed and effective as of the date set forth above.

CUSTOMER:
ST. LUCIE WEST SERVICES DISTRICT

By:

Print: _____
Chairman, SLW Board of Supervisors

ISI:
INTEGRATED SERVICES, INC.

By: _____
Brian K Callahan, President

Date: _____

2025 Rate Schedule

Revised: January 1, 2025

Page 1 of 3

Integration Services, Inc.

Advanced Process Automation

Standard Service Rates and Terms

Integration Services, Inc. is a process automation and systems integration service provider specializing in industrial and municipality process control systems, process instrumentation and their communication with other plant and business systems. The project and maintenance services provided to our clients are often quoted on a *lump sum* and/or *time and material* basis. This document outlines our standard fees for services provided on a *time and material* basis.

Consultation Services Fees

Configuration Services	Rate
Consulting for System Design Development SCADA / Control System Design Automation Plan Development Review of regulatory requirement	\$155/hour

Standard Integration Services Fees

Configuration Services	Rate
Advanced Control DCS & S88 Batch Configuration	\$150/hour
Standard Configuration, DCS, PLC W/HMI Regulatory Logical I/O Database Development Graphics Development Reporting Development	\$140/hour

Field Engineering Services	Rate
Offsite Remote Trouble Shooting	\$130/hour
Onsite Field Services PLC/ Server / Workstation diagnostics & Repairs PLC Programming and or SCADA field changes Network Equipment troubleshooting and Repairs	\$135/hour

Instrumentation & Commissioning Services	Rate
General Onsite Services Instrumentation Calibration Instrumentation & Control Troubleshooting Fieldbus Commissioning & Diagnostics Loop Checkout Tuning	\$135/hour

This standard rate schedule is for professional services. A new rate schedule will be issued effective January 1 of each year and as necessary on an interim basis to account for new services or revised charges. Invoices will be submitted bi-monthly and are payable when issued. All invoices not paid within thirty (30) days of receipt will be subject to a service charge of 1.5% per month.

Confidential Document

2025 Rate Schedule

Revised: January 1, 2025

Page 2 of 3

Integration Services, Inc.

Advanced Process Automation

Instrumentation & Control Services	Rate
Onsite & Offsite Services As Built Field Wiring / Instrumentation Documentation CAD Services	\$110/hour
Onsite & Offsite Design Services	\$125/hour

Electrical Contracting & Field Electrical	Rate
Master Electrician	\$95/hour
Journeyman	\$85/hour
Field Helper	\$60/hour

Overtime, Weekend and Holiday Premiums

The above rates are valid during the Integration Services, Inc. normal business hours of 8AM to 5PM, Monday through Friday excluding ISI observed holidays. Service provided outside of the proceeding times is subject to premiums as follows:

- Saturdays or normal business days outside 8AM – 5PM: 1.5 x Base Rate
- Sundays or holidays: 2.0 x Base Rate

Emergency Service Premium

Emergency service calls will be charged at 1.5 times the rate plus any additional charges due to work outside of normal business hours. There is a minimum 4 hour charge for on-site service and 2 hour charge for service via phone line. An emergency service call is any request for service that is received less than 48 hours from the time of customer request. Generally, 1 week prior notice for any service request is appreciated.

Miscellaneous Expenses

Subcontractors, Materials, Equipment and any project specific costs are charged at cost plus an administrative fee of 10%.

Travel Expenses

Airfare, Hotel, Meals, Rental Cars, etc. are billed at cost. Mileage will be billed at current IRS allowed mileage rate.

This standard rate schedule is for professional services. A new rate schedule will be issued effective January 1 of each year and as necessary on an interim basis to account for new services or revised charges. Invoices will be submitted bi-monthly and are payable when issued. All invoices not paid within thirty (30) days of receipt will be subject to a service charge of 1.5% per month.

Confidential Document

2025 Rate Schedule

Revised: January 1, 2025

Page 3 of 3

Integration Services, Inc.

Advanced Process Automation

Project Changes

If the scope of a project changes, additional services or materials may be required or requested to complete the project. Integration Services, Inc. maintains a project change management procedure to handle such circumstances. A Project Change Request (PCR) will be issued for any deviation that has a significant effect on project capital, expense or schedule. The PCR must be reviewed and approved by the customer before work will commence.

Service Initiation

Integration Services, Inc. must have a suitable purchase order, contract or written authorization with firm agreement on terms and conditions to begin work.

Cancellation Charges

Should the customer decide to cancel a project before completion, cancellation charges will be assessed at the current rates for work completed but not yet invoiced or non-returnable materials. The client will also be assessed for any re-stocking or miscellaneous expenses incurred by Integration Services, Inc. due to cancellation of the project.

This standard rate schedule is for professional services. A new rate schedule will be issued effective January 1 of each year and as necessary on an interim basis to account for new services or revised charges. Invoices will be submitted bi-monthly and are payable when issued. All invoices not paid within thirty (30) days of receipt will be subject to a service charge of 1.5% per month.

Confidential Document

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

DM 4 Consider Authorization to Renew with Florida Blue as the District Insurance Provider

Summary

Staff received a proposal for the renewal of our employee health insurance.

After working with Mary Leighton from Benefits Ability and evaluating this proposal from Florida Blue, staff recommend moving forward with the renewal of our existing policies with Florida Blue.

This proposal reflects an increase in health insurance costs in the amount of \$59,354.70 or 4.97%. This increase is below the approved proposed FY2026 budget amount of 8.0%.

If approved, the next rendition of the FY2026 Budget will reflect these savings.

Florida Blue Proposal for FY 2026 is attached.

Recommendation

Staff recommends approval to sign with Florida Blue for the Fiscal Year 2026.

District Manager: Joshua C Miller

Public Works Director/ Assistant District Manager: Gerard Rouse

Budget Impact

Project Number:

Available Project Budget: \$0.00

ORG Number:

This Project: \$0.00

Available Balance: \$0.00

Board Action

Moved by:

Seconded by:

Action Taken:



St. Lucie West Services District 2025 Medical Coverage

Carrier Name	Florida Blue		Florida Blue	
Effective Date	Current September 1, 2024		Negotiated Final Offer September 1, 2025	
Type of Plan	BlueOptions 3559	BlueOptions 5786	BlueOptions 3559	BlueOptions 5786
Network Access	In-Network	In-Network	In-Network	In-Network
PCP Election	No	No	No	No
Specialists	Open Access	Open Access	Open Access	Open Access
Coinsurance	80%	100%	80%	100%
Office Services				
PCP Office Visit	\$20	\$25	\$20	\$25
Specialists Office Visit	\$40	\$45	\$40	\$45
Preventive Care	No charge	No charge	No charge	No charge
Hospital / Facility Services				
In-Patient	\$600	\$500 Per Day / \$1500 Max	\$600	\$500 Per Day / \$1500 Max
Out-Patient Hospital / Surgical	\$100	\$150	\$100	\$150
Physician Services at Hospital & ER	20% after \$500 ded	No charge after \$1000 ded	20% after \$500 ded	No charge after \$1000 ded
MRI, CT Scans, PET Scans / X-Ray	\$150 / \$50	\$350 / \$50	\$150 / \$50	\$350 / \$50
Independent Lab	No charge	No charge	No charge	No charge
Emergency Care (waived if admitted)	\$100	\$250	\$100	\$250
Urgent Care	\$45	\$50	\$45	\$50
Pharmacy				
Tier I	\$10	\$10	\$10	\$10
Tier II	\$30	\$30	\$30	\$30
Tier III / Tier IV	\$50	\$50	\$50	\$50
Mail Order Pharmacy	2.5x Copay	2.5x Copay	2.5x Copay	2.5x Copay
Calendar Year Deductible				
Individual	\$500	\$1,000	\$500	\$1,000
Family	\$1,500	\$3,000	\$1,500	\$3,000
Annual Out of Pocket				
Includes Deductibles	Yes	Yes	Yes	Yes
Individual	\$2,500	\$4,000	\$2,500	\$4,000
Family	\$5,000	\$8,000	\$5,000	\$8,000
Lifetime Maximum	Unlimited	Unlimited	Unlimited	Unlimited
Out-of-Network Benefits	60% after \$750/\$2250 ded	50% after \$2000/\$6000 ded	60% after \$750/\$2250 ded	50% after \$2000/\$6000 ded
	\$5,000 / \$10,000	\$8,000 / \$16,000	\$5,000 / \$10,000	\$8,000 / \$16,000
Mix				
Employee	16	8	16	8
Employee + Spouse	4	5	4	5
Employee + Child(ren)	4	3	4	3
Family	7	9	7	9
Rates				
Employee	\$923.45	\$891.77	\$969.16	\$936.20
Employee + Spouse	\$2,105.47	\$2,033.23	\$2,209.68	\$2,134.54
Employee + Child(ren)	\$1,846.90	\$1,783.53	\$1,938.32	\$1,872.41
Family	\$2,955.04	\$2,853.65	\$3,101.31	\$2,995.85
Monthly Total	\$51,269.96	\$48,333.73	\$53,807.73	\$50,742.18
Annual Total	\$615,239.52	\$580,004.70	\$645,692.76	\$608,906.16
Combined Monthly Total	\$99,603.69		\$104,549.91	
Combined Annual Total	\$1,195,244.22		\$1,254,598.92	
% Over / Under Current Rates	--		4.97%	
Annual Premium Increase / Decrease	--		\$59,354.70	

St. Lucie West Services District
Board Agenda Item
Tuesday, July 8, 2025

Item

DM 5 Consider Acceptance of the FY2024 Financial Report by Grau & Associates

Summary

For your review and acceptance is the Fiscal Year 2024 Financial Report by Grau & Associates, also known as the end of year audit.

Digital Copies have been emailed to the Board and will be available on the website upon acceptance.

Recommendation

Staff recommend acceptance of the FY2024 Financial Report as presented.

District Manager: Joshua C Miller
Public Works Director/ Assistant District Manager: Gerard Rouse

Budget Impact

Project Number:	Available Project Budget: \$0.00
ORG Number:	This Project: \$0.00
	Available Balance: \$0.00

Board Action

Moved by:	Seconded by:	Action Taken:
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St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

DM 6 Consider Approval of the Request to Change in Engineering Services from Infrastructure Solutions Services

Summary

For your review and approval is a Request to Change Engineering Services from Infrastructure Solutions Services (ISS) our existing stormwater and utilities engineering firm.

This request is related to the incorporation of ISS by HR Green. The engineering staff under Brian Stahl will remain the same and the contract services shall remain the same.

Staff have met with both ISS and HR Green and have discussed the projects and needs of the District.

Staff recommend approval of this change request.

Recommendation

Staff recommend approval of the Request to Change Engineering Services by ISS and continue using ISS/HR Green for District Contract Engineering Services.

District Manager: Joshua C Miller

Public Works Director/ Assistant District Manager: Gerard Rouse

Budget Impact

Project Number:

Available Project Budget: \$0.00

ORG Number:

This Project: \$0.00

Available Balance: \$0.00

Board Action

Moved by:

Seconded by:

Action Taken:

Chairman Dominick Graci and Board of Supervisors
St. Lucie West Services District
450 Utility Drive
Port St. Lucie, FL 34986

June 10, 2025

**Re: Request for Change in District Engineering Staff Services for St. Lucie West Services
District by Infrastructure Solution Services – HR Green Team**

Dear Sir/Madam:

I am pleased to inform you that Infrastructure Solutions Services, LLC ("ISS") is expanding our District Engineering Staff Services through additional capabilities. First, I wanted to let you know that Mr. Fariborz Zanganeh, PE recently changed his working status from Full-Time to Part-Time on Call Employee.

The ISS-HR Green Team proposes a District Engineer service approach that will provide you with more comprehensive engineering services. The primary purpose of this change is to ensure the continuation and expansion of our service through a focused engineering team approach as follows:

- 1) Rob Lee, PE, Senior Civil-Stormwater Engineer
- 2) Neako Ramirez-Villamil, EI, Civil Engineer
- 3) Clayton McCormack, PE, Senior Water-Wastewater-Reclaimed Water Engineer
- 4) Lindsey Carvalho, EI and Joao Nascimento, Water-Wastewater-Reclaimed Water Engineer

I, Brian Stahl, PE, Regional Director, will continue to be available to the needs of the SLWSD. With this letter the ISS-HR Green Team respectfully requests your consent to the Team Staffing proposed to serve you.

Please feel free to contact me directly with any questions or should you need any additional information regarding this request for change in District Engineering Staff Services for SLWSD.

Sincerely,
Infrastructure Solution Services – HR Green

Brian M. Stahl, P.E.
Regional Director

Chairman Dominick Graci and Board of Supervisors
St. Lucie West Services District
450 Utility Drive
Port St. Lucie, FL 34986

June 10, 2025

Re: Professional Services Agreements, effective as of 04/05/2016 (as amended, the “Agreements”), by and between St. Lucie West Services District and Infrastructure Solution Services, LLC,

Dear Sir/Madam:

Following up on our conversation with Mr. Josh Miller, District Manager, a few weeks ago, I am pleased to inform you that Infrastructure Solutions Services, LLC (“ISS”) is consolidating our capabilities through a strategic alignment with HR Green, Inc. Green Companies, Inc, sole parent to the HR Green family of companies, acquired the membership interests of ISS on April 8, 2025 (the “Acquisition”). The primary purpose of this change is to ensure the continuation and expansion of our service offerings to all of our clients. As part of the integration between the two firms, we have (1) registered a fictitious name “Infrastructure Solution Services, an HR Green company” with the Florida Board of Engineers and (2) are proceeding to consolidate the operations of ISS under HR Green, Inc. (HR Green). It is important to communicate that the ISS team that has served SLWSD for many years will continue our engagement without interruption, with a deeper bench of resources to support you. Pursuant to the Acquisition agreement, ISS will continue its current operations during this transition periods as a wholly owned subsidiary of Green Companies, Inc., and affiliate to HR Green, Inc.

By this letter, HR Green, Inc. respectfully requests your consent and upon signature, hereby assumes and ratifies all the terms, conditions and requirements of ISS under the below listed Agreement(s).

Additionally, please be advised that HR Green will perform the work required by the Agreement with the existing ISS professionals and there will be no interruption in the services provided pursuant to the Agreement.

Owner Agency	Description
St. Lucie West Services District	Continuing Engineering Contract

We respectfully request that you countersign this letter and return an executed copy to: Infrastructure Solution Services, LLC, 7175 Murrell Road, Melbourne FL 32940, Attn: Brian Stahl, PE, Regional Director or e-mail it to Bstahl@infrastructuress.com. Alternatively, to the extent you require other documentation necessary to effectuate the transfer, we are happy to execute such form(s) in accordance with your internal procedures. Please feel free to contact me directly with any questions or should you need any additional information regarding the change in operations. Our legal department is also available to address any questions regarding organizational filings, and contact information is listed below.

Sincerely,

Infrastructure Solution Services, LLC

By: _____

Name: Brian M. Stahl, P.E.

Title: Regional Director

Acknowledged and Agreed to this _____ day of _____, 2025.

St. Lucie West Services District

By: _____

Name: _____

Title: _____

cc: Erin Winner, Esq.

General Counsel

EWinner@HRGreen.com

630-708-5059 (direct)



St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

DM 7

Other Items

Summary

Discussion/Update items:

St. Lucie West Services District
Board Agenda Item
Tuesday, July 8, 2025

Item

CA 1 Public Works Monthly Reports

Summary

This report is provided for your review and information as an update to the operations of the Public Works Department

Recommendation

Budget Impact

Project Number:	Available Project Budget: \$0.00
ORG Number:	This Project: \$0.00
	Available Balance: \$0.00

Board Action

Moved by:	Seconded by:	Action Taken:
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St. Lucie West Services District Public Works Department May 2025

<u>Division</u>	<u>Service Orders*</u>	<u>Work Orders**</u>
Aquatics	46	6
Exotic Plant Removal	27	11
Storm Water	37	66
Vac Truck	9	0
Dredge Barge	0	0
Video Ray	10	0
Shop	146	0
Grand Total	275	83

Aquatics Division:

Operations & Maintenance:

<u>Type</u>	<u>Service Orders</u>	<u>Work Orders</u>
Algae	15	0
Injection Treatments	2	0
Hydrilla Treatments	0	0
Midge Fly Treatments	0	0
Harvester Removal	0	0
Surface Plant Treatments	7	0
Wetland & Upland Treatments	0	0
Debris Removal	17	0
Miscellaneous	5	6

Scheduled Maintenance

- Lake Cleaning Schedule - Available Upon Request

Exotic Plant Removal Division:

Operations & Maintenance:

<u>Type</u>	<u>Service Orders</u>	<u>Work Orders</u>
Encroaching Preserves	13	11
Lygodium Treatments	0	0
Exotic Vegetation Treatments	5	n/a
Tree Removals	5	0
Preserves Maintenance	0	n/a
Vine Management	0	0
Miscellaneous	4	n/a

Scheduled Maintenance

- None

Storm Water Division:

Operations & Maintenance:

<u>Type</u>	<u>Service Orders</u>	<u>Work Orders</u>
Locates	n/a	65
Street Flooding	0	1
Grate Cleaning	4	0
Improved Landscaping & Mowing	3	n/a
Miscellaneous	30	0

Storm Water Division Cont'd:

Scheduled Maintenance

- Right of Way Mowing done the first 2 weeks of each month.

Storm Water Division / Vac Truck:

Operations & Maintenance:

<u>Type</u>	<u>Service Orders</u>	<u>Work Orders</u>
Cleaning Out Pipes	3	n/a
Cleaning Out Structures	3	n/a
Miscellaneous	3	n/a

Scheduled Maintenance

- None

Other Information

- _____ 200 _____ Estimated Footage Cleaned
- 0
- none

Storm Water Division / Dredge Barge:

Operations & Maintenance:

<u>Type</u>	<u>Service Orders</u>	<u>Work Orders</u>
Dredging Pipes	0	n/a
Miscellaneous	0	n/a

Scheduled Maintenance

- None

Other Information

- _____ 0 _____ Estimated Yardage Cleaned
- None
- None

Storm Water Division / Video Ray:

Operations & Maintenance:

<u>Type</u>	<u>Service Orders</u>	<u>Work Orders</u>
Viewing Pipes	10	n/a
Miscellaneous	0	n/a

Scheduled Maintenance

- None

Shop Division :

Operations & Maintenance:

<u>Type</u>	<u>Service Orders</u>	<u>Work Orders</u>
Vehicle Repair	37	n/a
Equipment Repair	59	n/a
Other Repair	50	n/a
Total Repairs	146	n/a

Scheduled Maintenance

- None

* Service Orders are internally logged on an as needed basis by each department. No document is created.

** Work Orders are generated by office staff and distributed to the appropriate department. A physical document is created and distributed.

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

CA 2 Monthly Report on Utilities Operations

Summary

This report is provided for your review and information as an update on the day-to-day Utilities operations of the St. Lucie West Services District and will be provided once a month.

St. Lucie West Services District Monthly Utilities Operations Report

Summary		ERC Water/Wastewater Update			
<u>WATER</u>					
Commercial Accounts		527			
Residential Accounts		6,285			
Total Plant Capacity Based on 3.6 MGD		14,400.00			
Water ERC's sold as of October 1st		12,346.00			
Current ERC(use) including the Reserve CDD		9,285.00			
The Reserve Commitment for 2023		0.00			
Unsold Water ERC's as of October 1st		2,054.00			
Sold in FY 2024 (see water table below)		11.10			
Total Unsold Capacity for Water		2,042.90			
Total Unused Capacity for Water		5,103.90			
WATER		RESIDENTIAL	COMMERCIAL	THE RESERVE	WATER FEES COLLECTED
ERC's sold in	Oct-24	0.0	1.2	0	\$ 3,342.00
ERC's sold in	Nov-24	0.0	0.0	0	\$ -
ERC's sold in	Dec-24	0.0	0.0	0	\$ -
ERC's sold in	Jan-25	0.0	8.9	0	\$ 24,786.50
ERC's sold in	Feb-25	0.0	0.0	0	\$ -
ERC's sold in	Mar-25	0.0	0.0	0	\$ -
ERC's sold in	Apr-25	0.0	0.0	0	\$ -
ERC's sold in	May-25	1.0	0.0	0	\$ 2,785.00
ERC's sold in	Jun-25	0.0	0.0	0	\$ -
ERC's sold in	Jul-25	0.0	0.0	0	\$ -
ERC's sold in	Aug-25	0.0	0.0	0	\$ -
ERC's sold in	Sep-25	0.0	0.0	0	\$ -
Total Water ERC's sold for FY 2025		1.0	10.1	0	\$ 30,913.50
<u>WASTEWATER</u>					
Commercial Accounts		474			
Residential Accounts		6,285			
Total Plant Capacity Based on 2.60 MG/TMADF		10,400.00			
Wastewater ERC's sold as of October 1st		9,876.80			
Current ERC(use) including the Reserve CDD		6,447.00			
The Reserve Commitment for 2023		0.00			
Unsold Wastewater ERC as of October 1st		523.20			
Sold in FY 2024 (see W.Water table below)		11.10			
Total Unsold Capacity for Wastewater		512.10			
Total Unused Capacity for Wastewater		3,941.90			
WASTEWATER		RESIDENTIAL	COMMERCIAL	THE RESERVE	WASTEWATER FEES COLLECTED
ERC's sold in	Oct-24	0.0	1.2	0	\$ 2,700.00
ERC's sold in	Nov-24	0.0	0.0	0	\$ -
ERC's sold in	Dec-24	0.0	0.0	0	\$ -
ERC's sold in	Jan-25	0.0	8.9	0	\$ 20,025.00
ERC's sold in	Feb-25	0.0	0.0	0	\$ -
ERC's sold in	Mar-25	0.0	0.0	0	\$ -
ERC's sold in	Apr-25	0.0	0.0	0	\$ -
ERC's sold in	May-25	1.0	0.0	0	\$ 2,250.00
ERC's sold in	Jun-25	0.0	0.0	0	\$ -
ERC's sold in	Jul-25	0.0	0.0	0	\$ -
ERC's sold in	Aug-25	0.0	0.0	0	\$ -
ERC's sold in	Sep-25	0.0	0.0	0	\$ -
Total Wastewater ERC's sold for FY 2025		1.0	10.1	0	\$ 24,975.00
New Connections in May:		1.00	ERC's		

St. Lucie West Services District Monthly Utilities Operations Report

May-25

Water Treatment Facility

- Total Finished Water Produced for May was
- The Finished Water Produced for the Previous Twelve Months was
- The Average Daily Flow of Finished Water for May was
- The Annual Average Daily Flow of Finished Water for May was
- The Three Month Average Daily Flow of Finished Water for May was
- The Water Treatment Plant Capacity is Operating at
- The Water Plant Annual Withdrawal Capacity per SFWMD WUP is at

61.23	MG
718.41	MG
1.98	MG
1.97	MG
2.04	MG
54.9%	
80.3%	

Water Treatment Plant Projects for May:

- New Injection Well Construction Began
- Reserve CDD Service Area Incorporation Process Ongoing
-

Wastewater Treatment Facility

- Total Influent Wastewater flow for May was
- Total Effluent Wastewater flow for May was
- The Average Daily Flow of Influent Wastewater for May was
- The Average Daily Flow of Effluent Wastewater for May was
- The Annual Average Daily Flow of Influent Treated for May was
- The Three Month Average Daily Flow of Influent Treated for May was
- The Wastewater Plant Capacity is Operating at

44.27	MG
43.29	MG
1.43	MG
1.40	MG
1.50	MG
1.47	MG
56.6%	

Wastewater Treatment Plant Projects for May:

-



**Underground Utilities Division
Work Task and Service Order Monthly Report**

Month/Year: May-2025

Count	Description
51	New Service/Connect/Disconnect/occupant change
1	Install Permanent Meter
0	Remove Permanent Meter
1	Install Temporary Meter
1	Remove Temporary Meter
0	Lock off/Close Account
0	Lock off Return payment
5	Lock Off Temporary
23	Lock Off Non-Payment
19	Reconnection "No Fee"
4	Reconnection "Regular Hours"
3	Reconnection "After Hours"
0	Reconnection "Inspection"
12	Check for Leak "No Leak Found"
19	Check for Leak "Customers Responsibility"
23	Check for Leak "Districts Responsibility"
0	Meter Reading Exception
0	Meter Maintenance
2	Read Meter pull Data Office Request
6	Meter Box
0	Follow up "Meter Swap"
0	Complaints "UGU Irrigation"
0	AMI Lock off Leak
2	Meter Change Out
0	Fire Hydrant
0	Irrigation "Checking for Leaks and Turning on Or Shutting Off Valves"
12	Sewer "Backups, Sewer Caps, or Breaks"
0	Lift station "District"
0	Read Meter Office Request
74	Locates
14	Complaints "Water Quality, Pressure, etc..."
0	Follow up "Incomplete Task by District or Contractor from Previous Service Orders"
0	Read Meter pull Data Customer Request
0	AMI Code Leak
0	Lock off Failed ARR
1	Lockoff Non Payment Office
7	Door Hanger
0	Service Action
70	AMI Leak Alarm
13	Vactor Lift Stations 1,10,23,41,51,53,35,39,19,24,22,28,27
UGU CONSTRUCTION CREW PROJECTS:	
<ul style="list-style-type: none"> • (15) CONCRETE VALVE PADS -Throughout District • (1) SIDEWALK REPAIR - Lake Forest 	

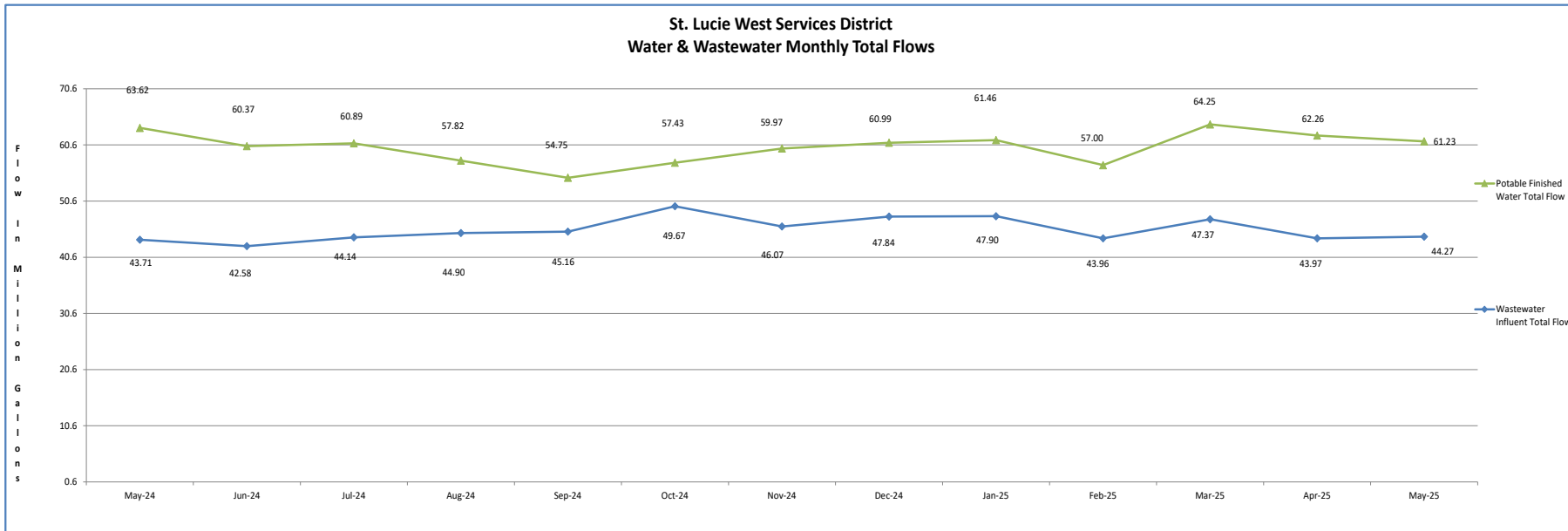
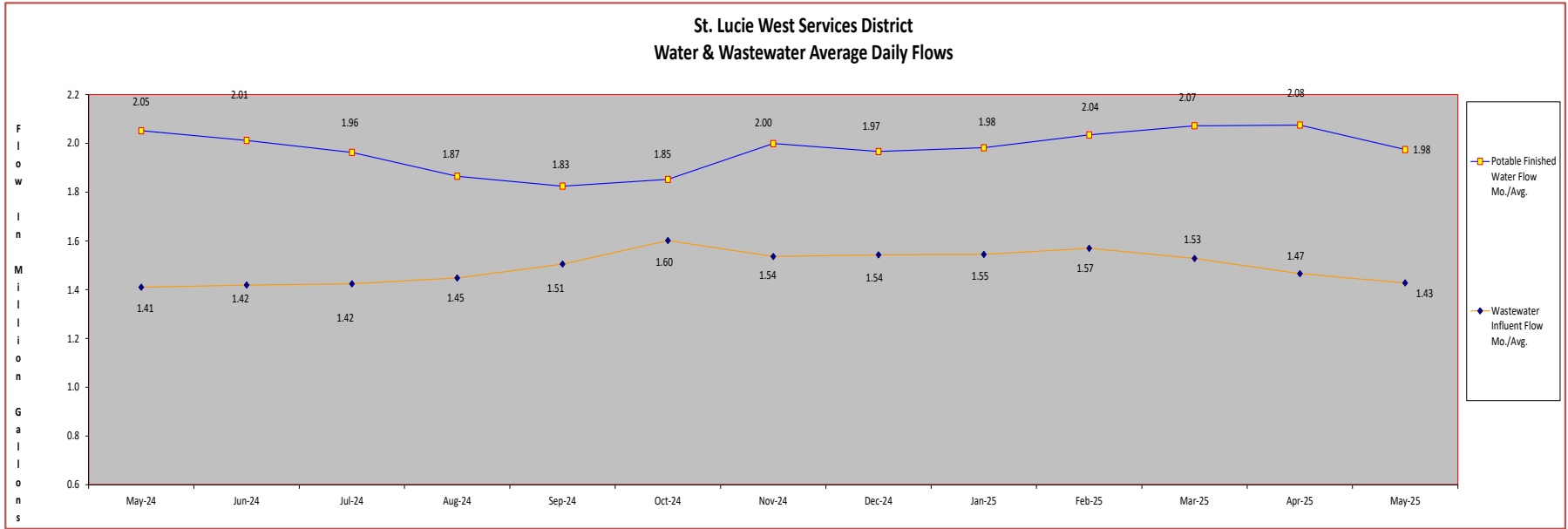
IRRIGATION MONTHLY REPORT- MAY 2025

SERVICE ORDERS	
<u>S/O DESCRIPTION</u>	<u>TOTAL</u>
* CHECK FOR LEAK & OPERATE VALVES	31
IQ FOLLOW UP (ANGEL)	3
ACREAGE MEASUREMENT	0
COMPLAINTS	12
TIMER CHANGE REQUEST	0
ADDITIONAL TIME REQUEST NEW PLANTINGS	2
* Also reported un UGU MOR	

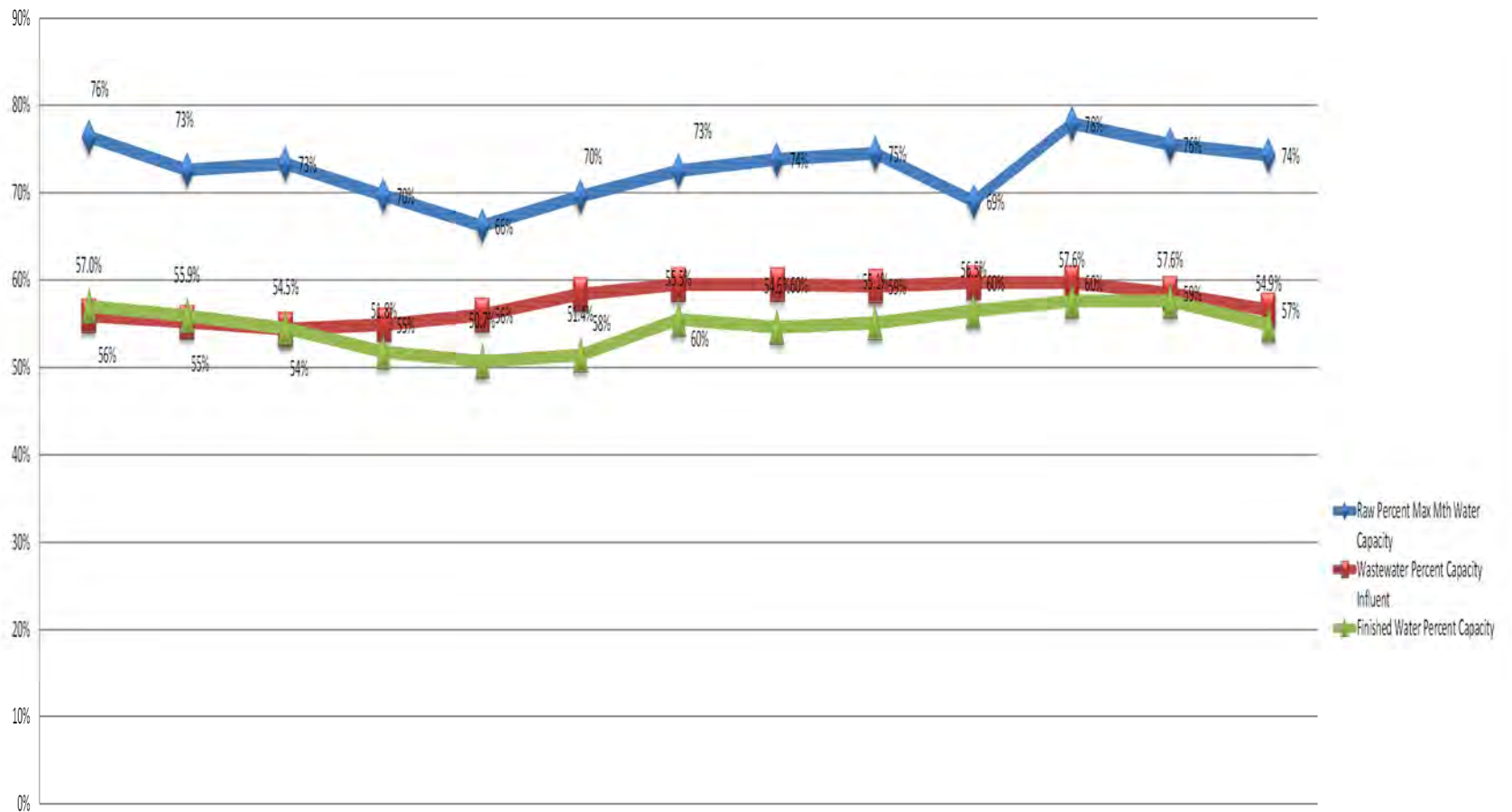
IRRIGATION FLOWS			
<u>SOURCE</u>	<u>TOTAL (MG)</u>	<u>ADF (MG)</u>	<u>MAX DAY (MG)</u>
LK CHARLES	0.000	0.000	0.000
LK ERNIE	29.322	0.946	2.420
MAIN PUMP STATION	58.054	1.873	4.138
STORM WATER TRANSFER	18.188	0.587	2.019
SURFICIAL WELLS	1.648	0.053	0.284
BRACKISH WELLS	0.579	0.019	0.052
GOLF COURSE	6.341	0.205	0.514

FLOWS (CATEGORIZED)			
	<u>TOTAL (MG)</u>	<u>%</u>	<u>MAX DAY (MG)</u>
REUSE	43.294	47.68%	1.711
STORMWATER	47.510	52.32%	
WELLS (ALL)	2.227	2.45%	
TOTAL	90.804	102.45%	

PROJECTS	

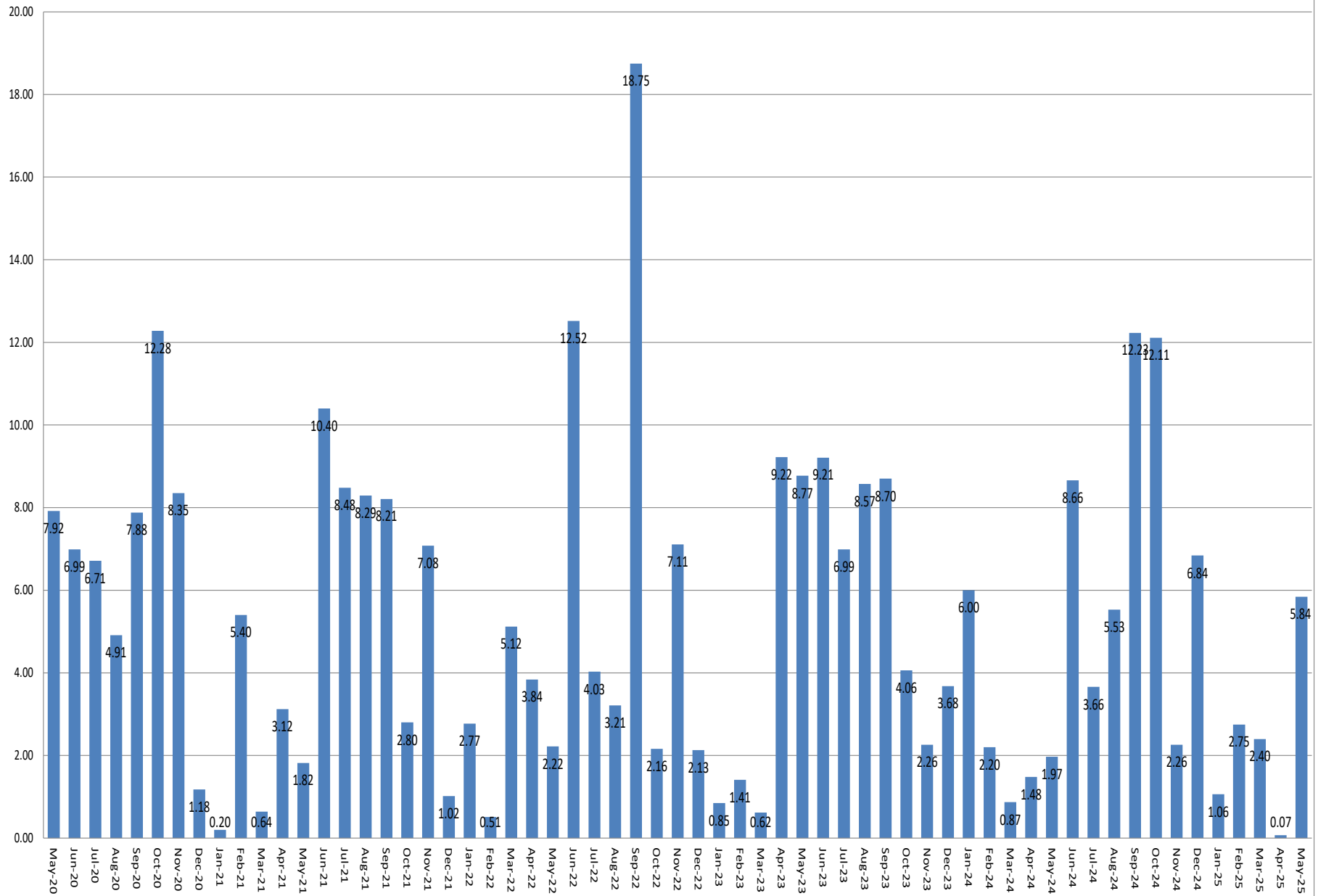


St. Lucie West Services District Water and Wastewater Percent Capacity



	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25
Raw Percent Max Mth Water Capacity	76%	73%	73%	70%	66%	70%	73%	74%	75%	69%	78%	76%	74%
Wastewater Percent Capacity Influent	56%	55%	54%	55%	56%	58%	60%	60%	59%	60%	60%	59%	57%
Finished Water Percent Capacity	57.0%	55.9%	54.5%	51.8%	50.7%	51.4%	55.5%	54.6%	55.1%	56.5%	57.6%	57.6%	54.9%

St. Lucie West Services District Monthly Rainfall



St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

CA 3 Monthly Report on Capital Improvement Projects

Summary

This report is provided for your review and information as an update on the Capital Improvement Projects for the St. Lucie West Services District and will be provided once a month.

WM001	4C Gate Automation Project Completed
SW078	WTP Painting & Sealing of Tanks Completed
SW098	WTP Expansion Injection Well #2 Construction Began
SW098	WTP Expansion in Design Phase

PROJECT TRACKER - St Lucie West Services District

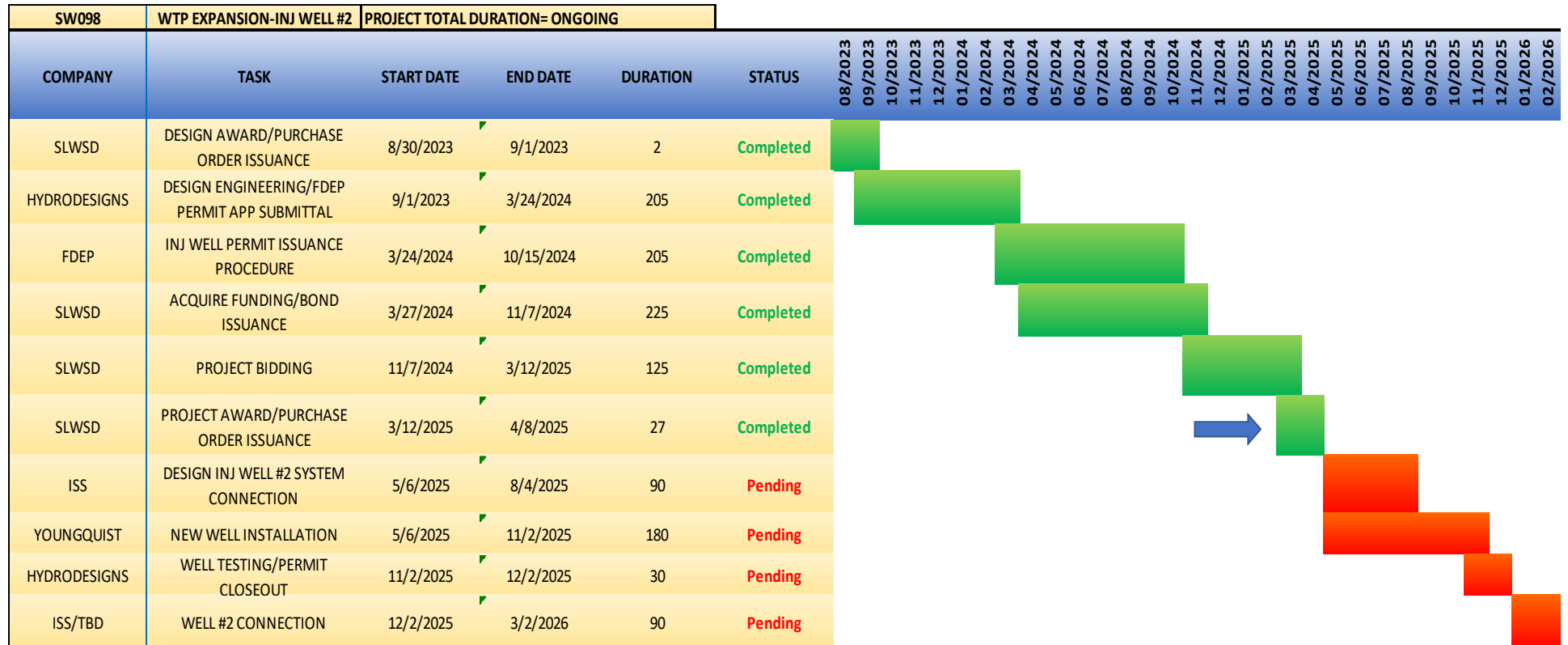
Project No.	Project Engineer	Project Manager	Contractor / Vendor	Approved Capital Budget Funds in Dollars	Encumbered / Actual Cost of Project in Dollars	Available 2025 Budget	Ongoing % Compl.	FY % Completion	Project	Oct-2024	Nov-2024	Dec-2024	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025	Jun-2025	Jul-2025	Aug-2025	Sep-2025	
WM001		GR		267,460	60,000	207,460		22%	Stormwater Emergency Repairs													4C Gate Project Completed
SW001		JM/TB		215,833	162,000	53,833		75%	Lift Station Renewal & Replacement													
SW037		JM/TB		250,000	95,000	155,000		38%	Emergency Renewal and Replacement Projects													
SW047		JM/TB		33,660	3,100	30,560		9%	Structural Repairs Manholes													
SW048		JM/TB		10,000	-	10,000		0%	Security Camera Upgrades													
SW049		JM/TB		29,700	-	29,700		0%	Protective Coating Manholes													
SW066		JM/TB		100,000	-	100,000		0%	WWTF Painting & Sealing of Tanks													
SW078		JM/TB		150,000	130,000	150,000	95%	87%	WTP Painting & Sealing of Tanks													WTP Tanks and Bldg Complete, Smaller Projects Bidding
SW084		JM/TB		5,000	-	5,000		0%	UGU Potable Water Flushing Devices													
SW085		JM/TB		15,750		15,750		0%	Emergency (Assoc. Irr.) R&R Projects													
SW087		JM/TB		70,000	-	70,000		0%	Irrigation SCADA Conversion													
SW091		JM/TB		5,000	-	5,000		0%	IRR Water Flushing Devices													
SW098	ISS	JM/TB	YOUNGQUIST	34,746,777	8,750,000	25,996,777		25%	WTP Expansion													INJ WELL #2 Construction Began Completion by 12/1
Total				\$ 35,899,180	9,200,100	26,829,080																

Available Budget Amounts Listed in RED are Over Budget
Available Budget Amounts Listed in Blue are At or Under Budget

TOTAL PROJECTS IN PROGRESS OR COMPLETE	13	13	13	13	13	13	13	13			
PROJECTS IN DESIGN PHASE	5	4	4	3	3	3	3	3			
PROJECTS IN BID PHASE	0	0	0	1	2	1	1	1			
PROJECTS IN CONSTRUCTION PHASE	0	0	0	0	0	1	1	1			
PROJECTS COMPLETED	0	1	1	1	0	0	0	0			
ONGOING CAPITAL R&R PROJECTS	8	8	8	8	8	8	8	8			

Major Project(s) Update

The schedules below are provided for your review and information as an update on the Capital Improvement Projects for the St. Lucie West Services District and will be updated and provided once a month.



CRITICAL PATH : Must Encumber 5.0 % of Project Funds Within 6 months(Bond Requirement).

SW098	WTP EXPANSION	PROJECT TOTAL DURATION= ONGOING																							
COMPANY	TASK	START DATE	END DATE	DURATION	STATUS	04/2025	05/2025	06/2025	07/2025	08/2025	09/2025	10/2025	11/2025	12/2025	01/2026	02/2026	03/2026	04/2026	05/2026	06/2026	07/2026	08/2026	09/2026	10/2026	11/2026
ISS	WTP DESIGN CRITERIA	4/8/2025	8/6/2025	120	Pending																				
SLWSD	DESIGN/BUILD BIDDING	8/6/2025	9/11/2025	36	Pending																				
SLWSD	PROJECT AWARD/PURCHASE ORDER ISSUANCE	9/11/2025	10/9/2025	28	Pending																				
CONTRACTOR/TBD	NTP/MOBILIZATION	10/9/2025	12/8/2025	60	Pending																				
CONTRACTOR/TBD	CONSTRUCTION	12/8/2025	8/5/2026	240	Pending																				
CONTRACTOR/TBD	FINAL CLOSEOUT	8/5/2026	9/4/2026	30	Pending																				
ISS	PERMITTING CLOSEOUT	9/4/2026	11/3/2026	60	Pending																				
SLWSD	OPERATIONAL TESTING	9/4/2026	11/3/2026	60	Pending																				

St. Lucie West Services District

Board Agenda Item
Tuesday July 8, 2025

Item

CA 4 Monthly Reports on Billing and Customer Service

Summary

This report is provided for your review and information as an update on the monthly Billing and Customer Service Operations.

The following are the totals from the accounts receivable reports.

1. Actual Consumption

Water	33,234,800	Gallons
Sewer	33,710,300	Gallons
Sewer BOD	0.00	Gallons
Sewer TSS	0.00	Gallons

2. Amount Billed

Total Water	\$304,429.96
Total Sewer	\$356,219.36
Total Irrigation	\$183,955.51

3. Billing

Total Water	6,812
Total Sewer	6,759
Total Irrigation	6,440



Month/Year

May - 2025

Monthly Deposited Daily Form

Date	WSI Total Deposit /Daily	Misc. Total Deposit/Daily	Date	WSI Total Deposit /Daily	Misc. Total Deposit/Daily
Mon	\$ -	\$ -	Mon	5/19/2025	\$ 10,772.51
Tues	\$ -	\$ -	Tues	5/20/2025	\$ 20,327.91
Wed	\$ -	\$ -	Wed	5/21/2025	\$ 24,944.13
Thur	\$ 59,773.08	\$ -	Thur	5/22/2025	\$ 9,549.79
Fri	\$ 51,873.00	\$ -	Fri	5/23/2025	\$ 20,155.03
Total - Week	\$ 111,646.08	\$ -	Total - Week		\$ 85,749.37
Mon	\$ 60,335.25	\$ -	Mon	5/26/2025 Holiday	\$ 6,103.69
Tues	\$ 26,775.15	\$ -	Tues	5/27/2025	\$ 60,630.97
Wed	\$ 413,233.72	\$ -	Wed	5/28/2025	\$ 31,252.68
Thur	\$ 10,558.48	\$ -	Thur	5/29/2025	\$ 37,884.36
Fri	\$ 38,255.21	\$ -	Fri	5/30/2025	\$ 52,520.50
Total - Week	\$ 549,157.81	\$ -	Total - Week		\$ 188,392.20
Mon	\$ 8,982.64	\$ -	Total Month Receivables		
Tues	\$ 5,926.02	\$ -			
Wed	\$ 3,156.42	\$ -			
Thur	\$ 3,156.19	\$ -			
Fri	\$ 13,200.09	\$ -			
Total - Week	\$ 34,421.36	\$ -	WSI	\$ 969,366.82	MISC
				\$ 1,018.95	

ST. LUCIE WEST SERVICES DISTRICT
ACCOUNTS BILLED AND MONTHLY RECEIVABLES

REPORT # 1 ACTIVE COMPANY

MONTH END SUMMARY 5/1/2025 - 5/31/2025

BALANCE TOTALS		
BEGINNING BALANCE AS OF	5/1/2025	
TOTAL BEGINNING BAL.	\$	644,607.75

GENERAL LEDGER

		<u>TOTAL BILL</u>			
	<u>DESCRIPTION</u>	<u>COUNT</u>	<u>BILLED AMOUNT</u>		
CHARGES	BASE CHARGES				
5-04109	IRRIGATION BASE	6440	\$ 181,774.37		\$ 826,382.12
5-04107	SEWER BASE	6759	\$ 203,769.38		\$ 1,030,151.50
5-04106	WATER BASE	6812	\$ 163,554.00		\$ 1,193,705.50
	DISPENSED/BULK WATER				
5-04046	BASE	17	\$ 1,316.09		\$ 1,195,021.59
5-04014	WHOLESALE WATER BASE	0	\$ -		\$ 1,195,021.59
	TOTAL CHARGE		\$ 550,413.84		
	CONSUMPTION CHARGES				
5-04009	IRRIGATION		\$ 2,181.14	<u>CONSUMPTION BY GALLONS</u>	
5-04007	SEWER		\$ 152,449.98	8,389,000	\$ 1,197,202.73
5-04007	SEWER-BOD EXCESS		\$ -	33,234,800	\$ 1,349,652.71
5-04007	SEWER-TSS EXCESS		\$ -	0.00	\$ 1,349,652.71
5-04006	WATER		\$ 140,875.96	0.00	\$ 1,349,652.71
	AVERAGE DAYS			33,710,300	\$ 1,490,528.67
				<u>29.89</u>	
5-04046	TANKER TRUCK WATER		\$ 375.57	90,280	\$ 1,490,904.24
5-04014	WHOLESALE WATER		\$ -	0	\$ 1,490,904.24
5-04021	WHOLESALE WASTEWATER		\$ -	0	\$ 1,490,904.24
	TOTAL CHARGE		\$ 295,882.65		
	DEPOSIT CHARGE				
	TOTAL CHARGES		\$ -		\$ 1,490,904.24
ADJUSTMENTS	IRRIGATION CHARGE				
	SEWER CHARGE		\$ 183,955.51		
	WATER CHARGE		\$ 356,219.36		
	TOTAL CHARGE		\$ 306,121.62		
			\$ 846,296.49		
	DESCRIPTION			<u>REVENUE</u>	<u>WRITE OFF</u>
	TOTAL REVENUE CHANGES			\$ (558.45)	\$ (0.55)
	TOTAL WRITE OFFS				
PENALTY CHARGES	DESCRIPTION		<u>AMOUNT</u>		
5-04010	TOTAL PENALTY		\$ 6,266.72		
MISCELLANEOUS CHARGES	DESCRIPTION		<u>AMOUNT</u>		
5-04012	TOTAL MISCELLANEOUS		\$ 375.00		
5-04047	BACK FLOW CHARGES		\$ -		
5-04047	BACK FLOW OPT OUT CHARGES		\$ -		
METER SET FEES	DESCRIPTION		<u>AMOUNT</u>		
5-04018	METER FEE		\$ 25.00		
5-04012	INITIAL CONNECTION METER FEE		\$ 150.00		
	TOTAL METER FEES		\$ 175.00		
IMPACT FEES	DESCRIPTION		<u>AMOUNT</u>		
5-04033	WATER IMPACT (AFPI)		\$ 395.00		
5-04035	SEWER IMPACT (AFPI)		\$ 320.00		
	TOTAL IMPACT (AFPI)		\$ 715.00		
				\$ 1,497,161.96	\$ 1,497,556.96
					\$ 1,497,876.96

5/1/2025 - 5/31/2025

\$	-
\$	599,940.86

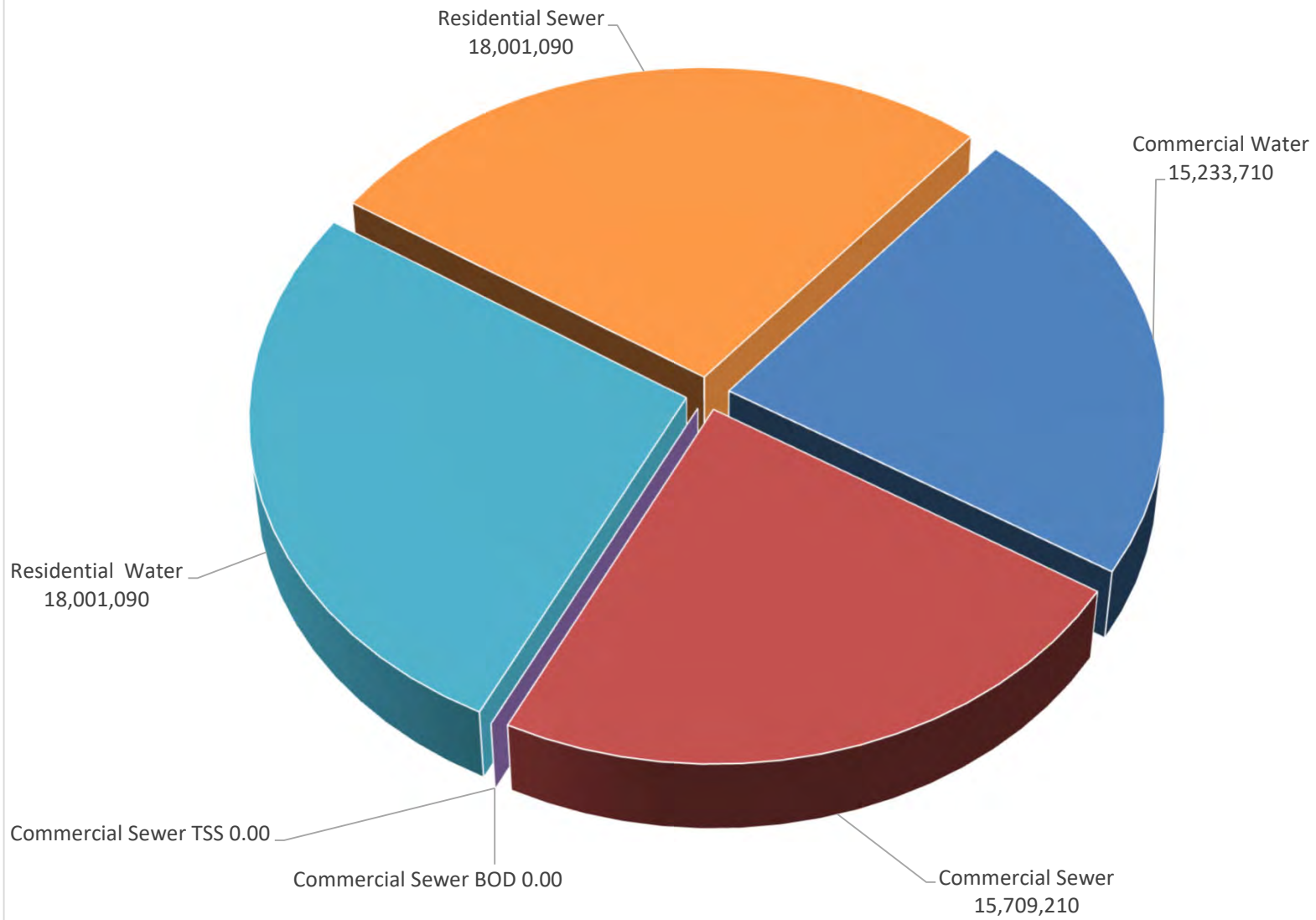
ST. LUCIE WEST SERVICES DISTRICT
ACCOUNTS RECEIVABLE SUMMARY

REPORT # 2 ACTIVE COMPANY			MONTH END SUMMARY		5/1/2025 - 5/31/2025
REFUNDS	DESCRIPTION	COUNT	AMOUNT		
	TOTAL REFUND CHECKS	14	\$ 2,761.96		\$ 602,702.82
TRANSFER BALANCE					
	DESCRIPTION		NET AMOUNT		
	RECEIVABLES ADJUSTED		\$ (1,439.93)		\$ 601,262.89
	RECEIVABLES RE-APPLIED		\$ 1,439.93		\$ 602,702.82
DEPOSIT ACTIVITY					
	DESCRIPTION		AMOUNT		
	BEGINNING DEPOSIT BALANCE		\$ 179,850.00		ENDING BALANCE AS OF
	BILLED DEPOSITS		\$ -		5/31/2025
5-02030	NEW DEPOSITS		\$ 6,000.00		\$ 602,702.82
	REFUNDS		\$ (5,400.00)		\$ -
	REVERSE REFUNDS		\$ -		\$ -
	REVERSE DEPOSITS		\$ -		\$ 602,702.82
	TOTAL DEPOSIT ENDING BALANCE		\$ 180,450.00		
MISC. PAYMENTS					
	DESCRIPTION				
	MISCELLANEOUS PAYMENTS RECEIVED		\$ 1,018.95		
				unpaid Reserve invoice	
				Total Ending Balance	

ST LUCIE WEST SERVICES DISTRICT AGED DEBT SUMMARY

MONTH/YEAR	Current Amount 1-30 DAYS	Amount 31-60 DAYS	Amount 61-90 DAYS	Amount 91-120 DAYS	Amount > 120 DAYS	BALANCE
April 2023	\$ 549,658.95	\$ 3,304.54	\$ 842.42	\$ 632.84	\$ 12,801.53	\$ 567,240.28
May 2023	\$ 474,951.08	\$ 5,673.58	\$ 987.18	\$ 712.85	\$ 13,410.96	\$ 495,735.65
June 2023	\$ 446,766.98	\$ 2,420.76	\$ 1,781.79	\$ 840.74	\$ 14,098.81	\$ 465,909.08
July 2023	\$ 460,568.90	\$ 2,635.66	\$ 783.29	\$ 749.43	\$ 8,313.23	\$ 473,050.51
August 2023	\$ 448,932.40	\$ 4,317.86	\$ 861.39	\$ 590.41	\$ 7,071.97	\$ 461,774.03
September 2023	\$ 459,827.82	\$ 2,615.12	\$ 693.88	\$ 402.56	\$ 5,675.49	\$ 469,214.87
October 2023	\$ 528,339.07	\$ 1,074.96	\$ 922.70	\$ 484.63	\$ 5,667.46	\$ 536,488.82
November 2023	\$ 521,901.25	\$ 6,882.22	\$ 758.97	\$ 429.91	\$ 4,488.03	\$ 534,460.38
December 2023	\$ 630,607.26	\$ 9,595.79	\$ 701.04	\$ 455.59	\$ 4,848.81	\$ 646,208.49
January 2024	\$ 477,568.71	\$ 3,294.78	\$ 1,262.04	\$ 457.47	\$ 4,980.63	\$ 487,563.63
February 2024	\$ 522,990.19	\$ 3,882.76	\$ 1,713.38	\$ 626.02	\$ 5,301.05	\$ 534,513.40
March 2024	\$ 547,751.06	\$ 1,843.03	\$ 1,071.99	\$ 525.72	\$ 5,927.07	\$ 557,118.87
April 2024	\$ 543,936.72	\$ 4,635.41	\$ 1,049.81	\$ 549.65	\$ 6,240.63	\$ 556,412.22
May 2024	\$ 481,556.41	\$ 1,419.75	\$ 1,107.76	\$ 640.60	\$ 4,464.92	\$ 489,189.44
June 2024	\$ 584,425.36	\$ 3,451.01	\$ 1,376.29	\$ 452.34	\$ 4,833.27	\$ 594,538.27
July 2024	\$ 585,513.06	\$ 4,613.24	\$ 2,179.21	\$ 823.49	\$ 5,188.18	\$ 598,317.18
August 2024	\$ 547,475.24	\$ 13,266.22	\$ 1,058.46	\$ 627.67	\$ 5,902.91	\$ 568,330.50
September 2024	\$ 515,792.07	\$ 5,200.34	\$ 1,277.70	\$ 568.63	\$ 6,466.13	\$ 529,304.87
October 2024	\$ 493,866.60	\$ 1,990.03	\$ 1,142.61	\$ 568.95	\$ 5,062.50	\$ 502,630.69
November 2024	\$ 548,637.28	\$ 13,005.51	\$ 1,509.20	\$ 594.22	\$ 3,906.22	\$ 567,652.43
December 2024	\$ 483,615.55	\$ 9,645.80	\$ 2,099.91	\$ 484.01	\$ 4,302.03	\$ 500,147.30
January 2025	\$ 562,044.87	\$ 8,877.71	\$ 993.45	\$ 780.17	\$ 4,145.98	\$ 576,842.18
February 2025	\$ 584,098.76	\$ 9,013.04	\$ 1,566.59	\$ 555.27	\$ 4,679.53	\$ 599,913.19
March 2025	\$ 548,067.13	\$ 7,083.59	\$ 1,056.88	\$ 487.71	\$ 5,182.90	\$ 561,878.21
April 2025	\$ 631,629.02	\$ 5,529.91	\$ 1,245.25	\$ 686.13	\$ 5,517.44	\$ 644,607.75
May 2025	\$ 567,568.35	\$ 26,494.62	\$ 1,988.43	\$ 294.45	\$ 6,356.97	\$ 602,702.82

Actual Consumption May 2025



CONSUMPTION BY GALLONS	
Commercial:	
Water	15,233,710
Sewer	15,709,210
Sewer- BOD	0.00
Sewer- TSS	0.00
Single:	
Water	15,720,870
Sewer	15,720,870
Multi:	
Water	2,280,220
Sewer	2,280,220
AMOUNT BILLED/TOTAL CHARGES:	
Commercial:	
Water	\$113,480.96
Sewer	\$127,745.96
IQ	\$53,871.04
TOTAL:	\$295,097.96
Single:	
Water	\$161,004.21
Sewer	\$192,333.90
IQ	\$114,363.96
TOTAL:	\$467,702.07
Multi:	
Water	\$29,944.79
Sewer	\$36,139.50
IQ	\$15,720.51
TOTAL:	\$81,804.80
TOTAL BILL COUNT	
Commercial:	
Water	527
Sewer	474
IQ	250
Single:	
Water	5,176
Sewer	5,176
IQ	5,175
Multi:	
Water	1,109
Sewer	1,109
IQ	1,015

CONSUMPTION	
Water	33,234,800
Sewer	33,710,300
Sewer- BOD	0.00
Sewer- TSS	0.00
AMOUNT BILLED	
Water	\$304,429.96
Sewer	\$356,219.36
IQ	\$183,955.51
BILLS	
Water	6,812
Sewer	6,759
IQ	6,440

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

CA 5 Public Information Officer Monthly Report

Summary

This report is provided for your review and information as an update on the public information of the St. Lucie West Services District and will be provided once a month.

St. Lucie West Services District Monthly Public Information Report

External Engagement & Media Relations

1) NW Peacock and St. Lucie Blvd. Construction (City of PSL) Project

- a. Attended the City's NW Peacock and St. Lucie West Blvd Construction Project Open Forum at the St. Lucie West Mets Stadium to gather information relevant to SLWSD residents. Project updates were then shared with residents via email and text using the GovDelivery Marketing & Communication Platform.

2) Drinking Water Taste Contest (Florida American Water Works Association-sponsored event)

- a. Attended the FSAWWA Region VIII-sponsored Drinking Water, "Best Tasting," Contest at the City of PSL Community Center. SLWSD participated in the event as a competitor.
*First Place Winner: Martin County.

3) Reserve CDD Integration Project

- a. SLWSD was featured in the May 22 edition of the St. Lucie Voice with an article about the Reserve CDD Integration. While the article provided valuable brand exposure, it inaccurately suggested that SLWSD is funding the integration. This was despite clearly informing the reporter during the May 15 interview that SLWSD residents would not be responsible for the cost. As a result of this misrepresentation, we had to take additional steps to clarify the facts with residents. This incident has led us to reevaluate future engagement with the newspaper, as this presented a second similar incident. This issue about the newspaper is also shared amongst external partners, such as the City of PSL Utilities.
- b. Press Release: The "*Reserve Community Development District Incorporating with St. Lucie West Services District for Improved Utility Services*" press release was shared with local news media on May 22.

4) St. Lucie West HOA/POA Presidents Council Meeting

- a. Attended and presented at the May 28 meeting of the St. Lucie West HOA/POA Presidents Council. Provided an update to association leadership on the Reserve CDD integration, including details on its funding structure.

5) City of PSL Council and St. Lucie County Board of County Commissioners Meetings

- a. Attended monthly public meetings of the City of Port St. Lucie Council and the St. Lucie County Board of County Commissioners on behalf of SLWSD to monitor and gather information relevant to the district.

Internal & External Communications

- 1) **SLWSD Monthly Newsletter**: The May Newsletter edition featured the SLWSD Annual Quality Report.
- 2) **New Website**: Continued development of SLWSD's new website with Granicus (new platform, provider). Key milestones completed this month include:
 - a. Review of initial homepage visuals.
 - b. OpenForms is a newly acquired platform that will be used to create digital forms on SLWSD's new website. This feature represents a significant improvement in customer

service by allowing residents and clients to complete and submit forms directly online. Examples include new account requests, rebate applications, and employment applications.

- c. The platform also enables staff to provide direct feedback to applicants—such as confirming receipt or updating them on the application process—through the system.

Overall, this offers a more streamlined and efficient approach to customer service.

- 3) **SLWSD “Who We Are” Video:** Completed a 4-minute video titled “Who We Are,” which provides an overview of SLWSD’s services and functions. The video is available on our website homepage and social media platforms and is also shown during resident engagement events. It serves as a quick, informative introduction to SLWSD for residents, media, and external partners.
- 4) **GovDelivery Messages Analytics:**

Message Topic	Date Sent	Message Method	Number Of Views
St. Lucie Nuclear Power Plant Quarterly Siren Test.	May 29	Email	2,963
(Press Release) <i>Reserve Community Development District Incorporating with St. Lucie West Services District for Improved Utility Services.</i>	May 22	Email	3,278
<u>CONSTRUCTION NOTICE:</u> St. Lucie West Blvd. and NW Peacock Blvd. Intersection.	May 9	Email & Text	9,549
Hear Our Story (SLWSD Video).	May 8	Email	2,859
Water Quality Report (May Newsletter).	May 7	Email	3,121
Irrigation Schedule Restrictions Due to Drought.	May 2	Email	3,141

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

CA 6 Financial Statements for May 31, 2025

Summary

Attached for your review are the Financial Reports for the period ending May 31, 2025.

- Financial Statements for all District Funds
- Check Register for General Fund and Water & Sewer Fund
 - Summary of Checks over \$35,000
- Balance Sheet Report for all Funds
- Bank Reconciliation Summary for all Depository Accounts

Recommendation

No Action Required.

Budget Impact

None.

Board Action

Moved by:	Seconded by:	Action Taken:
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St Lucie West Service District
Check Register
As of May 31, 2025

Date	Num	Name	Memo	Credit
ASSETS				
Current Assets				
Checking/Savings				
1-00001 - TRUIST (GF operating) #1363				
05/01/2025	13115	ARS POWERSPORTS, OKEECHOBEE		67.96
05/01/2025	13116	CHEMICAL CONTAINERS, INC.	PO#87292	155.64
05/01/2025	13117	CINTAS CORPORATION		2,055.71
05/01/2025	13118	FRANKLIN TEMPLETON BANK AND TR	SEP PAYROLL 04.30.25	12,100.57
05/01/2025	13119	Gannett Florida LocalIQ	PO#87293	227.44
05/01/2025	13120	HELENA CHEMICAL CO	PO#87299	2,397.50
05/01/2025	13121	MARINE WRAPS	PO#87285	171.78
05/01/2025	13122	MULLINAX OF VERO BEACH	PO#87298	3,217.10
05/01/2025	13123	NATURE'S KEEPER INC.	PO#87308	1,600.00
05/01/2025	13124	THOMPSON PUMP	PO#87289	2,334.14
05/01/2025	13125	VERIZON WIRELESS	PO#87269	859.14
05/01/2025	13126	VERMEER	PO#87275	3,687.24
05/01/2025	13128	VOIDED CHECK		
05/01/2025	13127	VOIDED CHECK		
05/08/2025	13129	GRAU AND ASSOCIATES	INV#26553	2,500.00
05/08/2025	13130	KYOCERA	PO#87323	1,117.93
05/08/2025	13131	MIKE'S ORGANIC TOP SOIL		6,000.00
05/08/2025	13132	NASON YEAGER GERSON HARRIS & FUMER...	PO#87330	630.00
05/08/2025	13133	PALMDALE OIL COMPANY, INC	PO#87303	1,503.24
05/08/2025	13134	SAMPSON TREE SERVICE CO.	PO#87317	500.00
05/08/2025	13135	ST LUCIE COUNTY CHAMBER OF COMMERCE	PO#87321	620.00
05/08/2025	13136	SUNSHINE STATE ONE CALL OF FLORIDA, I...	PO#87312	118.70
05/08/2025	13137	WEX BANK	PO#87332	11,846.94
05/13/2025	13138	TRUIST CARD SERVICES		8,266.80
05/14/2025		ASCENSUS	PR Check Date 05/14/25 (04/26/25-05/09/25) 457	2,104.98
05/15/2025	13139	AQUAFIX	INV#018319	3,564.00
05/15/2025	13140	ARMADILLO DIRT WORKS, LLC	INV#7571	4,250.00
05/15/2025	13141	ARS POWERSPORTS, OKEECHOBEE		370.98
05/15/2025	13142	BURNS EMBROIDERY & SCREEN PRINTING	VOID: PO#87349- vendor changed name and cann...	
05/15/2025	13143	CINTAS CORPORATION		1,108.70
05/15/2025	13144	EUROFINS FLOWERS	INV#6780023271	4,500.00
05/15/2025	13145	FPL	ACCT#54906-92539	50,835.06
05/15/2025	13146	FRANKLIN TEMPLETON BANK AND TR	SEP PAYROLL 05.14.25	12,210.66
05/15/2025	13147	KYOCERA	INV#55V1434613	14.06
05/15/2025	13148	LOWE'S	ACCT#9900 682872 9	2,620.81
05/15/2025	13149	SAM'S CLUB MASTERCARD	ACCT#5653	161.71
05/15/2025	13150	SITEONE LANDSCAPE SUPPLY, LLC	INV#153440875-001	299.45
05/15/2025	13151	TORCIVIA, DONLON, GODDEAU & RUBIN, P.A.	INV#23443	2,000.00
05/15/2025	13152	UNIFIRST	INV#3020127393	9,717.00
05/15/2025	13153	VERIZON WIRELESS	INV#6112125583	1,542.87
05/15/2025	13154	FCC ENVIRONMENTAL SERVICES, LLC	INV#FCCFL/25/1022684	653.67
05/15/2025	13155	FCC ENVIRONMENTAL SERVICES, LLC	INV#FCCFL/25/1031380	217.87
05/22/2025	13156	ADP, LLC	INV#690744912	1,597.25
05/22/2025	13157	CASE POWER & EQUIPMENT OF FLORIDA	INV#5144757-000	1,912.69
05/22/2025	13158	FEDEX	INV#8-867-48766	685.75
05/22/2025	13159	FLORIDA BLUE	HEALTH INSURANCE-GROUP NO. 41965 JUNE ...	100,642.09

Date	Num	Name	Memo	Credit
05/22/2025	13160	FLORIDA COAST EQUIPMENT	INV#P3406302	227.22
05/22/2025	13161	GUARDIAN	GROUP ID 00563384- JUNE 2025	5,067.23
05/22/2025	13162	HELENA CHEMICAL CO		6,427.28
05/22/2025	13163	MIKE'S ORGANIC TOP SOIL	INV#2025-0680	975.00
05/22/2025	13164	MULLINAX OF VERO BEACH	VOID: INV#159231- FORGOT TO APPLY CREDIT	
05/22/2025	13165	SHENANDOAH CONSTRUCTION	INV#104557	21,522.75
05/22/2025	13166	SUN LIFE	PLAN NUMBER: 960974-0001 JUNE 2025	3,644.85
05/22/2025	13167	SYSTEM DESIGN WIZARDS, INC.	INV#050125-1	1,320.00
05/22/2025	13168	T.J. GODWIN ENTERPRISES, INC	PO#87366	600.00
05/22/2025	13169	THOMPSON TRACTOR CO.	INV#150946	23.59
05/22/2025	13170	VERO CHEMICAL DISTRIBUTORS INC	ACCT#STLUWE	17,258.62
05/22/2025	13171	MULLINAX OF VERO BEACH	INV#159231	414.70
05/28/2025		ASCENSUS	PR Check Date 05/28/25 (05/10/25-05/23/25) 457 ...	2,085.33
05/29/2025	13172	FRANKLIN TEMPLETON BANK AND TR	SEP PAYROLL 05.28.25	12,292.49
05/29/2025	13173	HOME DEPOT CREDIT SERVICES	ACCT # 6035 3225 3921 0744	1,153.39
05/29/2025	13174	INTEGRATION SERVICES, INC.	INV#12025-01-07	1,024.42
05/29/2025	13175	MIKE'S ORGANIC TOP SOIL	INV#2025-0763	160.00
05/29/2025	13176	MULLINAX OF VERO BEACH	INV#159324	200.64
05/29/2025	13177	NEXAIR, LLC	INV#0013221540	572.26
05/29/2025	13178	PALMDALE OIL COMPANY, INC	INV#SI-28960	1,339.85
05/29/2025	13179	SCHAEFFER MFG. CO	INV#AXG1898-INV1	255.66
05/29/2025	13180	SPECIAL DISTRICT SERVICES, INC.	INV# 2025-0676	9,364.81
05/29/2025	13181	ST LUCIE COUNTY TAX COLLECTOR	TAX ROLL POSTAGE 2025	330.74
05/29/2025	13182	TRIPPENSEE SHAW, INC	INV#25-0516	1,114.00
05/29/2025	13183	WELLS FARGO VENDOR FINANCIAL SERVIC...	INV#5034382062	308.75
05/30/2025	13184	BURNS EMBROIDERY, INC	PO#87349	458.90
Total 1-00001 · TRUIST (GF operating) #1363				351,129.91
1-00002 · TRUIST (GF R&R Fund) # 3968				
Total 1-00002 · TRUIST (GF R&R Fund) # 3968				
5-00002 · TRUIST (WS Operating) #7918				
05/01/2025	14703	SHIELA GEACHICK	WATER CONSERVATION REBATE 2024-25 31	100.00
05/05/2025	14704	MULLINAX OF VERO BEACH	WWTP VEHICLE PURCHASE	26,220.00
05/08/2025	14705	CATHERINE FICKLING	WATER CONSERVATION REBATE 2024-25 33	200.00
05/08/2025	14706	FLORIDA ASSOCIATION OF SPECIAL DISTRI...	FASD ANNUAL CONFERENCE REGISTRATION...	703.00
05/08/2025	14707	INGEBORG FARRIS	WATER CONSERVATION REBATE 2024-25 35	20.00
05/08/2025	14708	JIM SUNDERWIRTH	REIMBURSEMENT OF PLUMBING CHARGES	460.00
05/08/2025	14709	NORMA CRETELLA	WATER CONSERVATION REBATE 2024-25 34	100.00
05/08/2025	14710	BRADLEY KRUGER	CUSTOMER REFUND 837 SW GRAND RESERV...	21.75
05/08/2025	14711	ENCLAVE PROPERTIES LLC	CUSTOMER REFUND 347 SW SANDY WAY	2.36
05/08/2025	14712	JOSEPH SMITH	CUSTOMER REFUND 597 SW ROMORA BAY	33.11
05/08/2025	14713	THOMAS PARKE	CUSTOMER REFUND 352 NW SHORELINE CIR	9.17
05/08/2025	14714	WILLIAM LAMBERT	CUSTOMER REFUND 145 NW WILLOW GROVE ...	99.38
05/15/2025	14715	WILLIAM FITZGIBBONS	WATER CONSERVATION REBATE 2024-25 36	100.00
05/22/2025	14716	LINDA GATTO	PLUMBING REIMBURSEMENT	99.00
05/22/2025	14717	STEPHEN SILVER	WATER CONSERVATION REBATE 2024-25 37	100.00
05/22/2025	14718	INGEBORG FARRIS	WATER CONSERVATION REBATE 2024-25 35 (R...	180.00
05/22/2025	14719	ANTHONY DANIELE	CUSTOMER REFUND 4 TEMP METER	893.31
05/22/2025	14720	CARL FEIT	CUSTOMER REFUND 380 NW SHOREVIEW DR	126.98

Date	Num	Name	Memo	Credit
05/22/2025	14721	FRANCINE LEBLANC	CUSTOMER REFUND 1226 D NW SUN TERRAC...	12.53
05/22/2025	14722	LINDA GOSTYLA	CUSTOMER REFUND 343 NW TUSCANY WAY	57.81
05/22/2025	14723	NIRMALA NEHAUL	CUSTOMER REFUND 825 SW ST ANDREWS CV	2.28
05/22/2025	14724	PATRICK VERGEL DE DIOS	CUSTOMER REFUND 782 SW MUNJACK CIR	17.41
05/22/2025	14725	PD PAINTING INC	CUSTOMER REFUND 3 TEMP METER	774.04
05/22/2025	14726	RAFAEL DIETSCH	CUSTOMER REFUND 5 TEMP METER	655.71
05/22/2025	14727	RICHARD CAPECE	CUSTOMER REFUND 1033 NW TUSCANY DR	56.72
05/29/2025	14728	ANGEL GONZALEZ	CUSTOMER REFUND 453 NW LISMORE LN	16.94
05/29/2025	14729	DONNA GREEN	WATER CONSERVATION REBATE 2024-25 39	100.00
05/29/2025	14730	LOIS K GIERWIELANIEC	CUSTOMER REFUND 1236 A NW SUN TERRAC...	96.80
05/29/2025	14731	PARKINSON SMALL	WATER CONSERVATION REBATE 2024-25 40	100.00
05/29/2025	14732	RICHARD PERSICHETTI	PLUMBER REIMBURSEMENT - SEWER BLOCKA...	125.00
Total 5-00002 · TRUIST (WS Operating) #7918				31,483.30
Total Checking/Savings				382,613.21
Total Current Assets				382,613.21
TOTAL ASSETS				382,613.21
LIABILITIES & EQUITY				
TOTAL LIABILITIES & EQUITY				

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

CA 7 Consider Approval to Transfer Funds for the R&R Account and UC Account Requisitions for Fiscal Year 2025

Summary

Attached for your review and approval is a request to transfer funds from the Renewal & Replacement Account (R&R) and Utility Construction Account (UC) for expenses that are previously budgeted project-related expenses for FY 2025 and have been previously approved by the Board to be funded from one of the afore mentioned accounts.

All of the expenditures are appropriate for payment from the R&R Account and UC Account Requisitions. All expenditures are in compliance with the District's policy where the cost exceeds the capitalization threshold for Fixed Assets.

- \$33,890.00 – Renewal & Replacement Account
- \$90,539.61 – Utility Construction Account

All Invoices for this requisition are attached for your review.

Recommendation

Staff recommends Board approval to transfer funds from the R&R Account for FY 2025 \$33,890.00 and UC Account for FY 2025 \$90,539.61 to the Public Fund Checking account for reimbursement for payments made that have been budgeted to be funded by this account.

Budget Impact

None.

Board Action

Moved by:	Seconded by:	Action Taken:
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**ST. LUCIE WEST SERVICES DISTRICT
FORM OF REQUISITION
RENEWAL & REPLACEMENT TRUST ACCOUNT**

The undersigned, an Authorized Officer of St. Lucie West Services District (the "District") hereby submits the following requisition for disbursement under and pursuant to the terms of the Master Indenture between the District and Truist Bank, Wilson, North Carolina, as trustee (the "Trustee"), dated as of November 1, 2024, as supplemented by the First Supplemental Trust Indenture between the District and Trustee, dated as of November 1, 2024, (collectively, the "Indenture"). All capitalized terms used herein shall have the meaning ascribed to such term in the Indenture):

(A) Requisition Number:

2025-14

(B) Name of Payee:

***St. Lucie West Services District, Water & Sewer Checking Account
Truist Account # 1000144367918***

(C) Amount Payable:

\$33,890.00

(D) Purpose for which paid or incurred (refer also to specific contract if amount is due and payable pursuant to a contract involving progress payments, or, state Transaction Costs, if applicable):

Per attached letter and invoices; all of these expenditures are for renewal and replacement projects where the costs exceeds the capitalization threshold for fixed assets held by the St. Lucie West Services District.

(E) Fund or Account and subaccount, if any, from which disbursement to be made:

Renewal/Replacement, Account Number 7998207

The undersigned hereby certifies that:

obligations in the stated amount set forth above have been incurred by the District, that each disbursement set forth above is a proper charge against the Renewal/Replacement Fund and the subaccount, if any, referenced above, that each disbursement set forth above was incurred in connection with the cost of extensions,

2025-14

improvements or additions to, or the replacement or renewal of capital assets of the Utility System, or extraordinary repairs of the Utility System.

OR

This requisition is for Transaction Cost payable from the Transaction Cost Account that has not previously been paid out of such Account.

The undersigned hereby further certifies that there has not been filed with or served upon the District notice of lien, right to lien, or attachment upon, or claim affecting the right to receive payment of, any of the moneys payable to the Payee set forth above, which has not been released or will not be released simultaneously with the payment hereof.

The undersigned hereby further certifies that such requisition contains no item representing payment on account of any retained percentage which the District is at the date of such certificate entitled to retain.

Originals or copies of the invoice(s) from the contractor of the improvements acquired or services rendered (or other equivalent supporting documents) with respect to which disbursement is hereby requested are on file with the District.

ST. LUCIE WEST SERVICES DISTRICT

By:

Authorized District Officer

**CONSULTING ENGINEER'S APPROVAL FOR
NON-TRANSACTION COSTS REQUESTS ONLY**

If this requisition is for a disbursement from other than Transaction Costs Account, the undersigned Consulting Engineer hereby certifies that this disbursement is for a Cost of the Renewal & Replacement Project and is consistent with: (a) the applicable acquisition or construction contract; (b) the plans and specifications for the portion of the Renewal & Replacement Project with respect to which such disbursement is being made; and (c) the report of the Consulting Engineer, as such report shall have been amended or modified on the date hereof.

Consulting Engineer

St Lucie West Service District
Transaction Detail By Account
 May 2025

2:06 PM
 6/30/25
 accrual Basis

Type	Date	Num	Name	Memo	Debit	Credit	Balance
5-37000 · WS RENEWAL & REPLACEMENT CIP							
5-37013 · CAPITAL PROJECTS SW047							
Bill	05/22/2025	W951087	CORE & MAIN	PO#87226 A	410.00		410.00
Total 5-37013 · CAPITAL PROJECTS SW047					410.00	0.00	410.00
5-37047 · CAPITAL PROJECTS SW099							
Bill	05/22/2025	W848195	CORE & MAIN	PO#87158 A	33,480.00		33,480.00
Total 5-37047 · CAPITAL PROJECTS SW099					33,480.00	0.00	33,480.00
Total 5-37000 · WS RENEWAL & REPLACEMENT CIP					33,890.00	0.00	33,890.00
TOTAL					33,890.00	0.00	33,890.00

**ST. LUCIE WEST SERVICES DISTRICT
FORM OF REQUISITION
UTILITY CONSTRUCTION ACCOUNT**

The undersigned, an Authorized Officer of St. Lucie West Services District (the "District") hereby submits the following requisition for disbursement under and pursuant to the terms of the Master Indenture between the District and Truist Bank, Wilson, North Carolina, as trustee (the "Trustee"), dated as of November 1, 2024, as supplemented by the First Supplemental Trust Indenture between the District and Trustee, dated as of November 1, 2024, (collectively, the "Indenture"). All capitalized terms used herein shall have the meaning ascribed to such term in the Indenture):

(A) Requisition Number:

2025-15

(B) Name of Payee:

***St. Lucie West Services District, Water & Sewer Checking Account
Truist Account # 1000144367918***

(C) Amount Payable:

\$90,539.61

(D) Purpose for which paid or incurred (refer also to specific contract if amount is due and payable pursuant to a contract involving progress payments, or, state Transaction Costs, if applicable):

Per attached letter and invoices; all of these expenditures relate to projects in which were budgeted to be funded by the Utility Construction account and therefore are appropriate for payment out of the Utility Construction Account.

(E) Fund or Account and subaccount, if any, from which disbursement to be made:

Utility Construction Account Number 7998218

The undersigned hereby certifies that:

obligations in the stated amount set forth above have been incurred by the District, that each disbursement set forth above is a proper charge against the Series 2024 Construction Account and the subaccount, if any, referenced above, that each disbursement set forth above was incurred in connection with the acquisition and/or construction of the Series 2024 Project

2025-15

and each represents a Cost of the Series 2024 Project, and has not previously been paid out of such Account or subaccount;

OR

This requisition is for Transaction Cost payable from the Transaction Cost Account that has not previously been paid out of such Account.

The undersigned hereby further certifies that there has not been filed with or served upon the District notice of lien, right to lien, or attachment upon, or claim affecting the right to receive payment of, any of the moneys payable to the Payee set forth above, which has not been released or will not be released simultaneously with the payment hereof.

The undersigned hereby further certifies that such requisition contains no item representing payment on account of any retained percentage which the District is at the date of such certificate entitled to retain.

Originals or copies of the invoice(s) from the contractor of the improvements acquired or services rendered (or other equivalent supporting documents) with respect to which disbursement is hereby requested are on file with the District.

ST. LUCIE WEST SERVICES DISTRICT

By:

Authorized District Officer

**CONSULTING ENGINEER'S APPROVAL FOR NON-COST OF ISSUANCE AND
CAPITALIZED INTEREST REQUESTS ONLY**

If this requisition is for a disbursement from other than Transaction Costs Account, the undersigned Consulting Engineer hereby certifies that this disbursement is for a Cost of the Series 2024 Project and is consistent with: (a) the applicable acquisition or construction contract; (b) the plans and specifications for the portion of the Series 2024 Project with respect to which such disbursement is being made; and (c) the report of the Consulting Engineer, as such report shall have been amended or modified on the date hereof.

Consulting Engineer

St Lucie West Service District Transaction Detail By Account

May 2025

2:17 PM

6/30/25

accrual Basis

Type	Date	Num	Name	Memo	Debit	Credit	Balance
5-38000 - WS WATER CONNECT FEE CIP							
5-38015 - CAPITAL PROJECTS SW098							
Bill	05/01/2025	12024-32-06	INTEGRATION SERVICES, INC.	PO#87078E	8,543.53		8,543.5
Bill	05/08/2025	002	AWB Trucking	PO#87333	2,250.00		10,793.5
Bill	05/08/2025	6700048910	EUROFINS FLOWERS	PO#87300	300.00		11,093.5
Bill	05/08/2025	1347809	FERGUSON ENTERPRISES	PO#87313	1,968.00		13,061.5
Bill	05/22/2025	247478283-001	UNITED RENTALS (NORTH AMERICA), INC.	PO#87364	4,480.42		17,541.9
Bill	05/22/2025	12025-01-08	INTEGRATION SERVICES, INC.	PO#87220 A	49,597.08		67,139.0
Bill	05/22/2025	247002149-001	UNITED RENTALS (NORTH AMERICA), INC.	PO#87367	2,759.42		69,898.4
Bill	05/29/2025	003	AWB Trucking	PO#87393	4,000.00		73,898.4
Bill	05/29/2025	RJ101388	AQUEOUS VETS, LLC	PO#86991A	11,000.00		84,898.4
General Journal	05/31/2025			PO#87293	141.16		85,039.6
General Journal	05/31/2025			PO#87311	3,500.00		88,539.6
General Journal	05/31/2025			PO#87318	2,000.00		90,539.6
Total 5-38015 - CAPITAL PROJECTS SW098					90,539.61	0.00	90,539.6
Total 5-38000 - WS WATER CONNECT FEE CIP					90,539.61	0.00	90,539.6
TOTAL					90,539.61	0.00	90,539.6

St. Lucie West Services District

Board Agenda Item

Tuesday, July 8, 2025

Item

CA 8 Surplus items

Summary

Provided for your review and approval. District Staff has determined that a declaration of surplus equipment is required from the Board of Supervisors for the liquidation of the following items. The declaration will allow staff to dispose of the following items:

Item	Model	Serial/ID	Department	Tag No.
Shore Conveyor	SL-4830	ABU93401300031417	Aquatics	036
Harvester	FX-5s	ABU9040100003231	Aquatics	048
Harvester Trailer	TLT-150s	4A9PB38201 W128001	Aquatics	049

Recommendation

Staff recommends approval for the declaration of surplus equipment.

District Manager: Joshua Miller

Budget Impact

Project Number:

ORG Number:

Available Project Budget: \$0.00

This Project: \$0.00

Available Balance: \$0.00

Board Action

Moved by:

Seconded by:

Action Taken:



Supervisors' Requests



Adjournment