



December 2023 Board Meeting

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Please follow page numbers on top right corner



Board Meeting Agenda

Date: Monday, December 11th, 2023

Time: 1:00 P.M.

Location: Captiva Civic Association, 11550 Chapin Lane, Captiva, Florida, 33924

Via Zoom: <https://us02web.zoom.us/j/89208113445>

Telephone: +1 (305) 224-1968

- 1. Call to Order**
- 2. Roll Call**
- 3. Organization of the Board**
- 4. Approval of Minutes**
 - A. November 13th, 2023, Board Meeting
- 5. General Public Comments – Limit 3 minutes per person**
- 6. Changes to the Agenda**
- 7. Financial Reports**
- 8. Old Business**
 - A. Becker Update
 - B. Bayside Adaptation Bid Selection
 - C. APTIM Update
- 9. New Business**
 - A. APTIM Beach Nourishment Update
- 10. Administrative Update**
- 11. Commissioner Comments**
- 12. Adjournment**

In accordance with the Americans with Disability Act and F.S. 286.26; any person with a disability requiring any additional reasonable accommodation to participate in this meeting should call the CEPD office at phone 239.472.2472 or email a written request to mycepd@mycepd.com. One or more elected or appointed local government officials, including but not limited to the Captiva Erosion Prevention District, may be in attendance at this meeting. Any person who decides to appeal any decision of the Board of Commissioners with respect to any matter considered at this meeting will need a record of the proceedings and for such purposes may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. The law does not require the CEPD to transcribe verbatim minutes; therefore, the applicant must make the necessary arrangements with a private reporter or private reporting firm and bear the resulting expense.



November 2023 Board Meeting Minutes

1. Call to Order – See Video (00:00:00)

Chairman Walter called to order the October Board Meeting for the Captiva Erosion Prevention District at approximately 1:00 PM on Monday November 13th, 2023.

2. Roll Call – See Video (00:00:17)

Commissioners:

- Seat 1, Linda Laird, Secretary (Present)
- Seat 2, Rene Miville, Commissioner (Present)
- Seat 3, Bob Walter, Chairman (Present Remotely)
- Seat 4, John Wade, Commissioner (Present)
- Seat 5, Richard Pyle, Treasurer (Present)

Chairman Miville motioned to vote to allow Chairman Walter to appear remotely, and Commissioner Wade seconded the motion. Motion passed 4-0

CEPD Staff:

- Daniel Munt, Executive Director (Present)
- John Riegert, Deputy Director (Present)
- Ralf Brookes, CEPD Attorney (Present)

3. Approval of Minutes – See Video (00:00:58)

A. October 9th, 2023 Board Meeting

Secretary Laird made a motion to approve the minutes and Commissioner Wade seconded the motion. The motion passed unanimously 5-0

4. General Public Comments – See Video (00:01:28)

Mike Mullins made a public comment regarding bid proposals for the bayside adaptation plan. Mr. Mullins asked if the use of private property visualizations that were used by APTIM were required, and if Cummings Cederburg would be required to provide the same material.

5. Changes to the Agenda – See Video (00:04:45)

Nick Matthews could not be present to provide Becker update, so portion 7B of agenda would be skipped.

6. Financial Reports – See Video (00:11:56)

Treasurer Pyle and Executive Director Munt provided an update on the financials and status of CEPD grants and discussion was held.

7. Old Business – See Video (00:11:59)

A. APTIM Update

Nicole Sharp provides update on Beach Renourishment Project. Nicole sites that surveys have been updated post Hurricane Idalia.

Secretary Laird asked questions regarding the amount and cost of sand needed for the project, post hurricane season and including dune walkover project.

Commissioner Miville asks questions about the plan for dune feature and timeline.

Treasurer Pyle asked a question about the span of time that completion of the project will support the island of Captiva.

Commissioner Wade asked questions about dune design and project implementation, and how project plans will be shared.

8. New Business – See Video (00:30:28)

A. Bayside Adaptation Bid Selection

- Paul Tritaik gives observations of both bids.
- Secretary Laird shares PowerPoint presentation of observations on both bids.
- Executive Director Munt shares internal group survey review of both bids and asks group to elaborate on individual scores.
- Commissioner discussion was held.
- Chairman Walter recommended to vote, that the five individuals that organized the internal survey (Munt, Riegert, Laird, Schuman, Tritaik) compose a list of lingering questions to both firms. Timeline for response from firms to be one week from date of delivery.
- Ralph Brookes stated that the final selection of bid package will be extended till the next CEPD board meeting (12/11/23).

Commissioner Miville made a motion to table discussion to the next board meeting upon receipt of additional information from bidders. Chairman Walter Seconded the motion. Motion passed unanimously 5-0

B. Coastal Resiliency Manager

Executive Director Munt proposes to the board, hiring Paul Tritaik as a consultant to the CEPD on a retainer basis, that will bridge the gap of finding a new person to fill role of Carrie Schuman. Discussion was held.

Commissioner Miville made a motion to accept the proposal and Secretary Laird seconded the motion. Motion passed unanimously 5-0.

C. 2024 Board Meeting Dates

Executive Director Munt presented the 2024 CEPD board and workshop meeting schedule to be advertised to the public.

Chairman Walter asked for motion to accept the schedule as presented. Commissioner Miville made the motion, and Commissioner Wade Seconded the motion. Motion passed unanimously 5-0

9. Administrative Update – See Video (02:15:59)

Executive Director Munt, shared need for grading in the Alison Hagerup parking lot, and tentative plans for completion.

10. Commissioner Comments – See Video (02:16:57)

Commissioner Wade issues concern regarding dune walkover planning and discussion was held.

11. Adjournment – See Video (02:25:39)

Secretary Laird motioned to adjourn the meeting. Chairman Walter seconded the motion. Motion passed unanimously 5-0

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Captiva Erosion Prevention District
General Fund - Budget Performance Detail
For the Two Months Ended November 30, 2023

	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)
	Actual - November '23	Budget - November '23	Actual - November '22	Budget - November '22	Actual YTD	YTD Budget	YTD Variance	Annual Budget	Residual Budget
Ordinary Income/Expense									
Income									
Ad Valorem Tax	86,800.98	100,000.00	17,623.20	54,245.75	86,800.98	100,000.00	(13,199.02)	578,066.00	491,265.02
Interest Income	1,469.40	1,666.67	4.29	12.50	3,120.34	3,333.33	(212.99)	20,000.00	16,879.66
Other Income	605.62	416.67	247.27	416.67	2,943.69	833.33	2,110.36	5,000.00	2,056.31
Total Income	88,876.00	102,083.33	17,874.76	54,674.92	92,865.01	104,166.67	(11,301.66)	603,066.00	510,200.99
Expense									
Administrative Expenses									
Advertising	0.00	1,250.00	17.00	1,250.00	1,573.19	2,500.00	926.81	15,000.00	13,426.81
Service Charges	282.19	416.67	202.75	250.00	597.86	833.33	235.47	5,000.00	4,402.14
Board Meeting Expenses	0.00	83.33	504.64	83.33	0.00	166.67	166.67	1,000.00	1,000.00
Dues and Subscriptions	600.00	600.00	0.00	625.00	7,515.00	8,000.00	485.00	11,000.00	3,485.00
Insurance	0.00	0.00	0.00	1,416.67	13,758.00	13,758.00	0.00	17,000.00	3,242.00
Office Expense	810.48	833.33	598.37	833.33	1,595.28	1,666.67	71.39	10,000.00	8,404.72
Postage	0.00	41.67	0.00	41.67	0.00	83.33	83.33	500.00	500.00
Rent Expense	1,165.80	1,416.67	927.05	1,250.00	3,516.44	2,833.33	(683.11)	17,000.00	13,483.56
Repairs	0.00	83.33	0.00	83.33	113.92	166.67	52.75	1,000.00	886.08
Travel and Per Diem	220.10	458.33	0.00	833.33	1,510.10	916.67	(593.43)	5,500.00	3,989.90
Telephone	387.56	458.33	204.03	250.00	702.66	916.67	214.01	5,500.00	4,797.34
Utilities	603.55	458.33	0.00	333.33	1,236.22	916.67	(319.55)	5,500.00	4,263.78
Website & Computer Maintenance	247.86	625.00	944.90	666.67	247.86	1,250.00	1,002.14	7,500.00	7,252.14
Total Administrative expenses	4,317.54	6,725.00	3,398.74	7,916.66	32,366.53	34,008.00	1,641.47	101,500.00	69,133.47
Wages and Professional Fees									
Wages	17,199.12	12,333.33	9,985.70	12,500.00	22,932.24	24,666.67	1,734.43	148,000.00	125,067.76
Professional Fees	1,550.00	2,916.67	0.00	2,916.67	3,100.00	5,833.33	2,733.33	35,000.00	31,900.00
Total Legal and Professional Fees	18,749.12	15,250.00	9,985.70	15,416.67	26,032.24	30,500.00	4,467.76	183,000.00	156,967.76
Cost of Collecting Ad Valorem									
Property Tax Appraiser Fees	0.00	0.00	0.00	416.67	4,605.21	5,000.00	394.79	5,000.00	394.79
Tax Collector Commissions	1,736.02	1,250.00	284.27	1,291.67	1,736.02	2,500.00	763.98	15,000.00	13,263.98
Total Cost of Collecting Ad Valorem	1,736.02	1,250.00	284.27	1,708.34	6,341.23	7,500.00	1,158.77	20,000.00	13,658.77
Reserves									
Operating Reserves Transfers	7,037.50	7,037.50	7,037.50	7,037.50	14,075.00	14,075.00	0.00	84,450.00	70,375.00
Total Expense	31,840.18	30,262.50	20,706.21	32,079.17	78,815.00	86,083.00	7,268.00	388,950.00	310,135.00
Net Income	\$ 57,035.82	\$ 71,820.83	\$ (2,831.45)	\$ 22,595.75	\$ 14,050.01	\$ 18,083.67	\$ (4,033.66)	\$ 214,116.00	\$ 200,065.99

Cash basis - omitted all note disclosures
No assurance is provided on these financial statements.

Captiva Erosion Prevention District
 General Fund - Budget Performance Summary
 For the Two Months Ended November 30, 2023

	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)
	Actual - November '23	Budget - November '23	Actual - November '22	Budget - November '22	Actual YTD	YTD Budget	YTD Variance	Annual Budget	Residual Budget
Ordinary Income/Expense									
Income									
Ad Valorem Tax	\$ 86,800.98	\$ 100,000.00	\$ 17,623.20	\$ 54,245.75	\$ 86,800.98	\$ 100,000.00	\$ (13,199.02)	\$ 578,066.00	\$ 491,265.02
Interest Income	1,469.40	1,666.67	4.29	12.50	3,120.34	3,333.33	(212.99)	20,000.00	16,879.66
Other Income	605.62	416.67	247.27	416.67	2,943.69	833.33	2,110.36	5,000.00	2,056.31
Total Income	88,876.00	102,083.33	17,874.76	54,674.92	92,865.01	104,166.67	(11,301.66)	603,066.00	510,200.99
Expense									
Administrative Expenses	4,317.54	6,725.00	3,398.74	7,916.66	32,366.53	34,008.00	1,641.47	101,500.00	69,133.47
Cost of Collecting Ad Valorem	1,736.02	1,250.00	284.27	1,708.34	6,341.23	7,500.00	1,158.77	20,000.00	13,658.77
Wages	17,199.12	12,333.33	9,985.70	12,500.00	22,932.24	24,666.67	1,734.43	148,000.00	125,067.76
Professional Fees	1,550.00	2,916.67	0.00	2,916.67	3,100.00	5,833.33	2,733.33	35,000.00	31,900.00
Reserves Transfer	7,037.50	7,037.50	7,037.50	7,037.50	14,075.00	14,075.00	0.00	84,450.00	70,375.00
Total Expense	31,840.18	30,262.50	20,706.21	32,079.17	78,815.00	86,083.00	7,268.00	388,950.00	310,135.00
Net Income	<u>\$ 57,035.82</u>	<u>\$ 71,820.83</u>	<u>\$ (2,831.45)</u>	<u>\$ 22,595.75</u>	<u>\$ 14,050.01</u>	<u>\$ 18,083.67</u>	<u>\$ (4,033.66)</u>	<u>\$ 214,116.00</u>	<u>\$ 200,065.99</u>

Cash basis- omitted all note disclosures
 No assurance is provided on these financial statements.

11:01 AM
12/6/2023
Prepared: JS

Captiva Erosion Prevention District
Capital Projects Fund - Budget Performance Summary
For the Two Months Ended November 30, 2023

	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)
	Actual - November '23	Budget - November '23	Actual - November '22	Budget - November '22	YTD Actual	YTD Budget	YTD Variance	Annual Budget	Residual Budget
Ordinary Income/Expense									
Income									
Grant Income	\$ -	\$ -	\$ -	\$ 15,000.00	\$ 194,500.48	\$ 195,000.00	\$ (499.52)	\$ 861,482.00	\$ 666,981.52
Interest Income	14,340.59	15,000.00	9.00	83.33	98,503.10	100,000.00	(1,496.90)	325,000.00	226,496.90
Other Miscellaneous Income	0.00	166.67	0.00	83.33	0.00	166.67	(166.67)	2,000.00	2,000.00
Parking Lot Revenue	24,777.13	41,666.67	0.00	60,000.00	49,985.59	83,333.33	(33,347.74)	500,000.00	450,014.41
Reserves - General	7,037.50	7,037.50	7,037.50	7,037.50	14,075.00	14,075.00	0.00	84,450.00	70,375.00
Special Assessments	146,029.58	0.00	1,089,976.96	191,666.67	146,029.58	150,000.00	(3,970.42)	952,698.00	806,668.42
Total Income	192,184.80	63,870.83	1,097,023.46	273,870.83	503,093.75	542,575.00	(39,481.25)	2,725,630.00	2,222,536.25
Expense									
General Expenses	2,582.09	4,291.67	2,490.15	3,375.00	7,818.73	8,636.00	817.27	34,500.00	26,681.27
Parking Lot	9,022.67	11,791.67	2,379.12	18,833.33	26,977.38	23,583.33	(3,394.05)	141,500.00	114,522.62
Wages	23,384.32	21,666.67	11,071.42	16,666.67	31,418.16	21,666.67	(9,751.49)	260,000.00	228,581.84
Professional Fees	7,550.00	9,166.67	0.00	9,166.67	15,100.00	9,166.67	(5,933.33)	110,000.00	94,900.00
Capital Projects	956.25	72,083.33	0.00	59,583.33	956.25	72,083.33	71,127.08	865,000.00	864,043.75
Debt Service	165,190.41	165,190.41	190,763.30	190,763.30	165,190.41	165,190.41	0.00	2,794,059.00	2,628,868.59
Total Expense	208,685.74	284,190.41	206,703.99	298,388.30	247,460.93	300,326.41	52,865.48	4,205,059.00	3,957,598.07
Net Income	<u>\$ (16,500.94)</u>	<u>\$ (220,319.58)</u>	<u>\$ 890,319.47</u>	<u>\$ (24,517.47)</u>	<u>\$ 255,632.82</u>	<u>\$ 242,248.59</u>	<u>\$ 13,384.23</u>	<u>\$ (1,479,429.00)</u>	<u>\$ (1,735,061.82)</u>

Cash basis - omitted all note disclosures
No assurance is provided on these financial statements.

12/6/2023
11:01 AM
Prepared: JS

Captiva Erosion Prevention District
Capital Projects Fund - Budget Performance Detail
For the Two Months Ended November 30, 2023

	(A)	(B)	(D)	(E)	(F)	(G)	(H)	(I)	
	Actual - November '23	Budget - November '23	Actual - November '22	Budget - November '22	YTD Actual	YTD Budget	YTD Variance	Annual Budget	Residual Budget
Ordinary Income/Expense									
Income									
Grant Income - Local	\$ -	\$ -	\$ -	\$ 15,000.00	\$ 194,500.48	\$ 195,000.00	\$ (499.52)	\$ 261,482.00	\$ 66,981.52
Grant Income - State	0.00	0.00	0.00	0.00	0.00	0.00	0.00	600,000.00	600,000.00
Grant Income - Federal (FEMA)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Interest Income	14,340.59	15,000.00	9.00	83.33	98,503.10	100,000.00	(1,496.90)	325,000.00	226,496.90
Other Miscellaneous Revenues	0.00	166.67	0.00	83.33	0.00	166.67	(166.67)	2,000.00	2,000.00
Parking Lot Revenue	24,777.13	41,666.67	0.00	60,000.00	49,985.59	83,333.33	(33,347.74)	500,000.00	450,014.41
General Reserves	7,037.50	7,037.50	7,037.50	7,037.50	14,075.00	14,075.00	0.00	84,450.00	70,375.00
Special Assessments	146,029.58	0.00	1,089,976.96	191,666.67	146,029.58	150,000.00	(3,970.42)	952,698.00	806,668.42
Total Income	192,184.80	63,870.83	1,097,023.46	273,870.83	503,093.75	542,575.00	(39,481.25)	2,725,630.00	2,222,536.25
Expense									
Service Charges	54.69	41.67	0.00	41.67	54.69	83.33	28.64	500.00	445.31
Cost of Assessment Collections	1,361.60	2,000.00	1,563.10	833.33	1,361.60	2,000.00	638.40	2,000.00	638.40
Insurance	0.00	0.00	0.00	416.67	2,886.00	2,886.00	0.00	5,000.00	2,114.00
Rent	1,165.80	1,416.67	927.05	1,250.00	3,516.44	2,833.33	(683.11)	17,000.00	13,483.56
Beach Vehicle	0.00	833.33	0.00	833.33	0.00	833.33	833.33	10,000.00	10,000.00
Total General Expense	2,582.09	4,291.67	2,490.15	3,375.00	7,818.73	8,636.00	817.27	34,500.00	26,681.27
Parking Lot Expenses									
Parking Collection Fees	32.95	1,500.00	32.95	3,000.00	65.90	3,000.00	2,934.10	18,000.00	17,934.10
Parking Maintenance	2,000.00	2,083.33	0.00	2,500.00	12,961.07	4,166.67	(8,794.40)	25,000.00	12,038.93
Portable Toilets	5,402.88	6,250.00	0.00	9,583.33	10,805.76	12,500.00	1,694.24	75,000.00	64,194.24
Signage	0.00	83.33	0.00	0.00	0.00	166.67	166.67	1,000.00	1,000.00
Sales Tax Expense	1,586.84	1,875.00	2,346.17	3,750.00	3,144.65	3,750.00	605.35	22,500.00	19,355.35
Total Parking Lot Expenses	9,022.67	11,791.67	2,379.12	18,833.33	26,977.38	23,583.33	(3,394.05)	141,500.00	114,522.62
Wages and Professional Fees									
Wages	23,384.32	21,666.67	11,071.42	16,666.67	31,418.16	21,666.67	(9,751.49)	260,000.00	228,581.84
Professional Fees	7,550.00	9,166.67	0.00	9,166.67	15,100.00	9,166.67	(5,933.33)	110,000.00	94,900.00
Total Wages and Professional Fees	30,934.32	30,833.33	11,071.42	25,833.34	46,518.16	30,833.33	(15,684.83)	370,000.00	323,481.84
Capital Projects									
Project Expenses	956.25	65,833.33	0.00	51,250.00	956.25	65,833.33	64,877.08	790,000.00	789,043.75
Grants to other agencies	0.00	6,250.00	0.00	8,333.33	0.00	6,250.00	6,250.00	75,000.00	75,000.00
Total Capital Projects	956.25	72,083.33	0.00	59,583.33	956.25	72,083.33	71,127.08	865,000.00	864,043.75
Debt Service									
Interest	165,190.41	165,190.41	190,763.30	190,763.30	165,190.41	165,190.41	0.00	330,456.00	165,265.59
Principal	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,463,603.00	2,463,603.00
Total Debt Service	165,190.41	165,190.41	190,763.30	190,763.30	165,190.41	165,190.41	0.00	2,794,059.00	2,628,868.59
Total Expense	208,685.74	284,190.41	206,703.99	298,388.30	247,460.93	300,326.41	52,865.48	4,205,059.00	3,957,598.07
Net Income	(16,500.94)	(220,319.58)	890,319.47	(24,517.47)	255,632.82	242,248.59	13,384.23	(1,479,429.00)	(1,735,061.82)

Cash basis - omitted all note disclosures.
No assurance is provided on these financial statements.

	<u>November 30, 2023</u>	<u>November 30, 2022</u>
ASSETS		
Current Assets		
Checking/Savings		
BOTI Checking	\$ 64,639.79	\$ 297,540.40
Fifth Third Checking	230,644.64	-
Fifth Third Savings	439,588.25	-
Total Checking/Savings	<u>734,872.68</u>	<u>297,540.40</u>
Other Current Assets		
Due from State of Florida	28,524.97	-
Total Other Current Assets	<u>28,524.97</u>	<u>-</u>
Total Current Assets	<u>763,397.65</u>	<u>297,540.40</u>
TOTAL ASSETS	<u>\$ 763,397.65</u>	<u>\$ 297,540.40</u>
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
Accrued Liabilities	1,118.26	614.10
Due to Capital Projects Fund	105,074.82	17,586.62
Total Other Current Liabilities	<u>106,193.08</u>	<u>18,200.72</u>
Total Current Liabilities	<u>106,193.08</u>	<u>18,200.72</u>
Total Liabilities	106,193.08	18,200.72
Equity		
Fund Balance	643,154.56	314,972.76
Net Income	14,050.01	(35,633.08)
Total Equity	<u>657,204.57</u>	<u>279,339.68</u>
TOTAL LIABILITIES & EQUITY	<u>\$ 763,397.65</u>	<u>\$ 297,540.40</u>

	<u>November 30, 2023</u>	<u>November 30, 2022</u>
ASSETS		
Current Assets		
Checking/Savings		
BOTI Checking	\$ -	\$ 1,250,124.15
Fifth Third Checking	30,418.70	-
Fifth Third Savings	4,305,549.28	-
Fifth Third Investments Money Market Account	159,939.31	2,876,104.18
Fifth Third Treasury Bill- Maturity Date 4/15/24	2,929,166.44	-
Fifth Third Treasury Bill- Maturity Date 4/15/25	2,497,953.86	-
Fifth Third Treasury Bill- Maturity Date 4/30/26	2,499,925.86	-
Fifth Third Treasury Bill- Maturity Date 3/15/26	758,687.95	-
Total Current Assets	<u>13,181,641.40</u>	<u>4,126,228.33</u>
Other Current Assets		
Utility Deposit	300.00	300.00
Due From General Fund	105,074.82	17,586.62
Total Other Current Assets	<u>105,374.82</u>	<u>17,886.62</u>
Total Current Assets	<u>13,287,016.22</u>	<u>4,144,114.95</u>
TOTAL ASSETS	<u><u>\$ 13,287,016.22</u></u>	<u><u>\$ 4,144,114.95</u></u>
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Due to General Fund	<u>\$ -</u>	<u>\$ -</u>
Equity		
Accumulated Reserves	1,237,247.00	2,929,004.00
Fund Balance	11,794,136.40	373,610.17
Net Income	255,632.82	841,500.78
Total Equity	<u>13,287,016.22</u>	<u>4,144,114.95</u>
TOTAL LIABILITIES & EQUITY	<u><u>\$ 13,287,016.22</u></u>	<u><u>\$ 4,144,114.95</u></u>
Loan Balance:		
Principal and Interest Payment Due May 1st 2024	\$ 15,587,541.47	
Interest Payment Due November 1st 2023	2,628,830.59	
	165,227.94	
Treasury Bills:		
	<u>Purchase Price</u>	<u>Value at Maturity</u>
4/15/2024-	\$2,929,166.44	3,075,000.00
4/15/2025-	\$2,497,953.86	2,542,000.00
4/30/2026-	\$2,499,925.86	2,588,000.00
3/15/2026-	\$758,687.95	733,000.00
		<u>Interest paid twice a year</u>
		5,765.53
		33,363.75
		30,732.50
		16,950.63
		<u>Total Gain</u>
		163,130.15
		210,864.89
		303,201.64
		76,015.83
		<u>753,212.51</u>

CAPTIVA EROSION PREVENTION DISTRICT RESERVE ACCUMULATIONS FISCAL YEAR ENDING 9/30/2024												
	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24
Beginning Balance	\$ 1,173,187	\$ 1,205,432	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247
Reserves Transferred In												
Parking Revenue	25,208	24,777	-	-	-	-	-	-	-	-	-	-
Operating Reserves	7,037	7,038	-	-	-	-	-	-	-	-	-	-
Increase (Decrease) in Reserves	32,245	31,815	-	-	-	-	-	-	-	-	-	-
Total Accumulated Reserves	\$ 1,205,432	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247	\$ 1,237,247

Cash basis - omitted all note disclosures
No assurance is provided on these financial statements.



Vendor Reference Verification Form for RFPs, RLIs and RFQs

Broward County Solicitation No. and Title:

Reference for:

Organization/Firm Name providing reference:

Contact Name:

Title:

Reference date:

Contact Email:

Contact Phone:

Name of Referenced Project:

Contract No.

Date Services Provided:

Project Amount:

Vendor's role in Project: Prime Vendor Subconsultant/Subcontractor

Would you use this vendor again? Yes No If No, please specify in Additional Comments (below).

Description of services provided by Vendor:

Please rate your experience with the referenced Vendor:

Needs Improvement

Satisfactory

Excellent

Not Applicable

1. Vendor's Quality of Service

a. Responsive

b. Accuracy

c. Deliverables

2. Vendor's Organization:

a. Staff expertise

b. Professionalism

c. Turnover

3. Timeliness of:

a. Project

b. Deliverables

4. Project completed within budget

5. Cooperation with:

a. Your Firm

b. Subcontractor(s)/Subconsultant(s)

c. Regulatory Agency(ies)

Additional Comments: (provide on additional sheet if needed)

THIS SECTION FOR COUNTY USE ONLY

Verified via: EMAIL VERBAL Verified by: _____ Division: _____ Date: _____

All information provided to Broward County is subject to verification. Vendor acknowledges that inaccurate, untruthful, or incorrect statements made in support of this response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to the Broward County Procurement Code.

Vendor Reference Verification Form – RFPs, RLIs, RFQs
(Revised 3/22)



Vendor Reference Verification Form for RFPs, RLIs and RFQs

Organization/Firm Name providing reference: *Palm Beach County ERM*
 Contact Name: *Andy Stuedt*
 Title: *Environmental Program Supervisor* Reference date: *12/4/23*
 Contact Email: *a.stuedt@pbcc.gov* Contact Phone: *561 2332539*
 Name of Referenced Project: *South Lake Worth Inlet Dredging*
 Contract No. Date Services Provided: *2019-2023*
 Project Amount: *~\$150,000*
 Vendor's role in Project: **Prime Vendor** **Subconsultant/Subcontractor**
 Would you use this vendor again? **Yes** **No**
 If No, please specify:

If Subconsultant/Subcontractor, would you consider employing this vendor as the prime vendor?
 Yes **No**
 If No, please specify:

Description of services provided by Vendor: *Permitting, Engineering, Design for South Lake Worth Inlet maintenance dredging and sand trap expansion.*

Please rate your experience with the referenced Vendor:

	Unsatisfactory	Satisfactory	Excellent	N/A
1. Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project completed within budget				
5. Cooperation with:				
a. Your Firm	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Subcontractor(s)/Subconsultant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Regulatory Agency(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Vendor Reference Verification Form for RFPs, RLIs and RFQs

Organization/Firm Name providing reference:

Contact Name: *Cynthia Buisson*

Title: *ASSISTANT DIRECTOR OF PUBLIC WORKS*

Contact Email: *fbuisson@mydelraybeach.com*

Name of Referenced Project: *SEAWALL VULNERABILITY STUDY*

Contract No. *~ \$180,000*

Project Amount: *↑*

Reference date: *11/17/23*

Contact Phone: *561-563-6152*

Date Services Provided:

Vendor's role in Project: Prime Vendor Subconsultant/Subcontractor

Would you use this vendor again? Yes No

If No, please specify:

If Subconsultant/Subcontractor, would you consider employing this vendor as the prime vendor?

Yes No *N/A*

If No, please specify:

Description of services provided by Vendor:

Please rate your experience with the referenced Vendor:

	Unsatisfactory	Satisfactory	Excellent	N/A
1. Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project completed within budget	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Cooperation with:				
a. Your Firm	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Subcontractor(s)/Subconsultant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c. Regulatory Agency(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



Vendor Reference Verification Form for RFPs, RLIs and RFQs

Organization/Firm Name providing reference: **TOWN OF LONGBOAT KEY**
 Contact Name: **ISAAC BROWMAN**
 Title: **PUBLIC WORKS DIRECTOR**
 Contact Email: **ibrownman@longboatkey.org**
 Name of Referenced Project: **COMPREHENSIVE ADAPTATION PLAN**
 Contract No. _____ Date Services Provided: **2018-2023**
 Reference date: **11/20/2023**
 Contact Phone: **941-316-1988**
 * Project Amount: **\$355,820**
 Vendor's role in Project: Prime Vendor Subconsultant/Subcontractor
 Would you use this vendor again? Yes No
 If No, please specify:

If Subconsultant/Subcontractor, would you consider employing this vendor as the prime vendor?
 Yes No
 If No, please specify:

Description of services provided by Vendor: **APTIM PROVIDED A STEP-BY-STEP FOUR (4) PHASE COMPREHENSIVE ADAPTATION PLAN FOR THE TOWN.**

Please rate your experience with the referenced Vendor:

	Unsatisfactory	Satisfactory	Excellent	N/A
1. Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Project completed within budget	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Cooperation with:				
a. Your Firm	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Subcontractor(s)/Subconsultant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Regulatory Agency(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

* INCLUDED MAJOR DATA-COLLECTION EFFORT IN PHASE 2.

** FINAL PH. 4 DELIVERABLE WAS A LITTLE LATER THAN EXPECTED, BUT FINAL PRODUCT WAS EXCELLENT AND SUBSEQUENTLY ADOPTED BY OUR TOWN COMMISSION.



Vendor Reference Verification Form for RFPs, RLLs and RFQs

Organization/Firm Name providing reference:

Contact Name: **Luis Molina**

Title: **Engineering Manager I**

Contact Email: **molinalr@leegov.com**

Reference date: **11/22/2023**

Contact Phone: **(239) 822-7823**

Name of Referenced Project: **Southern Lee County Flood Mitigation Plan**

Contract No.

Date Services Provided: **2018**

Project Amount: **\$1,711,000.00**

Vendor's role in Project: **Prime Vendor** **Subconsultant/Subcontractor**

Would you use this vendor again? **Yes** **No**

If No, please specify:

If Subconsultant/Subcontractor, would you consider employing this vendor as the prime vendor?

Yes **No**

If No, please specify:

Description of services provided by Vendor:

To establish a plan and recommend projects to reduce flooding on a larger regional scale.

Please rate your experience with the referenced Vendor:

	Unsatisfactory	Satisfactory	Excellent	N/A
1. Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project completed within budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Cooperation with:				
a. Your Firm	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Subcontractor(s)/Subconsultant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Regulatory Agency(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

APTIM Team's Responses to Follow-up Questions

1. What do you feel is the largest obstacle for CEPD to overcome in this project? Why? How do you plan to overcome this obstacle?

▶ *No Obstacles for Bayside Adaptation Plan*

In terms of completing Tasks 1-6 of the Bayside Adaptation Plan as scoped in the RFQ, the team does not foresee obstacles. It is assumed that CEPD, the community, and stakeholders can reach an agreement on goals, objectives, and expectations for adaptation strategies. Agreement would be necessary prior to development of the engineering report in Month 9 of the project.

✓ *Method: Clear Communication and Early Agreement*

Our approach involves a robust communication strategy. APTIM acknowledges the importance of clear and transparent communication with CEPD and the property owners. This includes engaging in discussions about the project's scope, design features, and the long-term implications. Establishing a shared understanding early in the process is vital for fostering collaboration and securing the necessary easements. Regular updates, community meetings, and informational materials will be employed to ensure CEPD and the property owners are well-informed and confident in their support of the adaptation measures in the plan and conceptual designs in the engineering report. Regulatory agencies will be engaged early in the project to ascertain expectations and again during the engineering report development to ensure design concepts are feasible.

▶ *Potential Obstacles for Implementation in Next Phase*

Implementation of the adaptation plan in the future will need the following to be addressed in a timely manner to ensure success: 1) acquiring easements from adjacent properties to support installation of continuous adaptation measures and 2) negotiating permitting requirements for construction on sovereign submerged lands while maintaining high benefit-cost ratios and return on investment ratios.

▶ *Obstacle 1: Easement Acquisition*

Shoreline protection performs best when it is continuous. Easements from the property owners will be necessary if any portion of a CEPD project lies within property boundaries. A declination of easement along the shoreline or nearshore would be an obstacle to constructing a continuous project.

✓ *Method to overcome: Clear Communication of Process*

APTIM will communicate the requirements for implementation during each community meeting to set expectations for easements early in the process. The results of the public-private implementation analysis will support communicating the benefits of the most desirable solution to the community. The project footprint may need to be adapted to fit the requirements of the regulatory agencies or individuals while maintaining economic benefits.

▶ *Obstacle 2: Permitting Construction on Sovereign Submerged Lands*

A state lease will be necessary for any construction on sovereign submerged lands and would be included with the state permit. A declination of lease along the nearshore would be an obstacle to constructing a continuous project.

✓ *Method to overcome: Proactive Permitting Strategy*

Permitting can be one of the most complex and time-consuming processes of any coastal project; however, APTIM's multidisciplinary staff regularly coordinates with state and federal permitting agencies on coastal protection projects and have established strong working relationships with regulatory agency staff. We understand the intricacies of coastal permitting and proactively engage the agencies prior to application submittal to ensure potential concerns are discussed upfront. We specialize in obtaining Joint Coastal Permits (JCP) from Florida Department of Environmental Protection (FDEP) and Department of the Army (DA) Permits from U.S. Army Corps of Engineers (USACE) for coastal projects, and our staff also has an expansive amount of experience in the Coastal Construction Control Line (CCCL) and Environmental Resource Permitting (ERP) process, giving us flexibility to provide permitting expertise for a variety of projects.

For some federal permitting efforts, the development of a formal National Environmental Policy Act (NEPA) document is required. APTIM biologists are professionally trained in the implementation of NEPA and have prepared numerous Environmental Impact Statements (EIS) and Environmental Assessments (EA) for both the USACE and Bureau of Ocean Energy Management (BOEM). We also prepare supporting documents, such as Essential Fish Habitat (EFH) assessments, Biological Assessments (BA) and Cumulative Effects Assessments (CEA) to assist coordination with the National Marine Fisheries Service (NMFS) and the U.S. Fish and Wildlife Service (USFWS). This training and experience can result in increased efficiency of a complex process.

Our track record reflects our ability to obtain permits for projects we responsibly envision. In recent years we have obtained multiple permits from FDEP, USACE, water management districts, and Florida Department of Transportation (FDOT). We work with the agencies to obtain long term multi-use permits where appropriate and allowed by rules and statutes.

To address this challenge, our team has developed a proactive permitting strategy. We anticipate potential restrictions, such as timelines and regulatory requirements, and have undertaken meticulous planning to navigate the permitting process efficiently. Engaging with regulatory agencies early, maintaining open lines of communication, and adhering to environmental guidelines are key elements of our strategy. Additionally, we prioritize transparency with stakeholders to manage expectations regarding the permitting timeline and potential hurdles, ensuring a well-informed and collaborative approach.

2. With the start of bayside adaptation and the upcoming beach nourishment, describe how you will balance the project management aspects of simultaneous projects for the CEPD.

APTIM has been CEPD's sole and steadfast coastal consultant dating back to the mid-1980's through our legacy firms and understands the work that needs to be done. APTIM's proven project management approach contains three elements: thorough planning, wise execution, and tight project controls. The project team has been carefully compiled to ensure adequate availability and qualified specialization. The majority of team members included in this effort were not included on the team supporting the beach nourishment efforts in order to ensure full commitment and timely completion of all bayside adaptation tasks. While the designated Project Management will be involved in both efforts, we believe this is a benefit, as it provides a compressive, real-time awareness and understanding of the current needs and status of projects along various areas of the island. This unique experience and prospective better positions APTIM's Project Manager to lead the team and make educated and community-backed decisions.

APTIM's Project Manager understands the critical role that effective task management and staffing plays in delivering exceptional services and achieving the goals outlined in the RFQ. Our staffing plan is designed to ensure the availability of skilled professionals to fulfill the diverse requirements across various labor categories. APTIM has a combined workforce of more than 3,500 employees in over 49 corporate/project offices and more than 100 field offices, which serves as an additional source of support, assistance, and specialization if and when needed. APTIM's Project Manager is prepared to retain complete responsibility for all management and administration of tasks projects, including safety, quality, cost and schedule, procurement, logistics, and subcontractor management.

3. Will the project be designed to WEDG standards?

Yes, the Waterfront Edge Design Guidelines (WEDG) offer a proven, comprehensive standard for incorporating resilience, ecology and access along the water's edge. The process for individual site assessment and planning, designing for climate and hazard resilience, optimizing projects for natural resources, innovation and owner interests and encouraging community participation and engagement throughout the project will be customized for the CEPD plan and projects. The standard helps communicate benefits of design elements and supports decision-making. Following WEDG standards offers the opportunity to submit the project for third party verification; however, submitting is not required and would have a cost from WEDG for review.

4. The executive summary mentions they will provide up to 25 conceptual designs and renderings. But, in the project approach section (page 35), you mention 10-15. Are you referencing the same deliverables in both places? If so, can you confirm how many conceptual designs/renderings they will offer? If not, can they you further clarification?

Our goal is to offer a robust set of visuals that enable the community to vividly envision the anticipated aesthetic changes and actively engage in the evolving decision-making process as the design progresses. We plan on generating multiple comprehensive design concepts with renderings along different shorelines or featuring unique design elements. A design concept may be depicted at the same location but visualized from distinct viewpoints. Our intention is to select approximately 25 key locations across the island, spaced at intervals of approximately 1,000 feet or strategically chosen spots and provide an ample number of conceptual adaptation drawings to facilitate a comprehensive visualization of the project.

5. Given the diverse shoreline of each individual bayfront property (some homeowners have docks, mangroves, seawalls, etc.), how will you approach design aspects that may require major changes for individual homeowners?

APTIM will work with CEPD to identify prioritized adaptation goals and objectives which will require an agreement upon the number of days of acceptable tidal flooding in the streets and upon a surge protection limit. Once these goals are clearly defined, the APTIM team will establish options for a high-level framework plan that will provide continuous protection and/or resilience options for the community. These options will be reviewed with the community to understand their preferences and will include a variety of potential solutions including living shorelines. Education of why this plan is happening and how each individual property is part of a larger vision will be important.

Owners' preferences regarding design standards and types of projects they will accept, and fund will fuel the tailoring of design aspects so that they will be accepted and implementable while also providing maximum flood protection benefits. Once preferred elements are established, the APTIM team will begin discussions with the property owners about the potential impacts on their property. It will be important to note that some changes may be more immediate, while others can occur over time to align with potential risk. The team can also consider typical life spans of the current facilities (docks, seawalls, etc.) to see if there are logical moments when replacement of those facilities can be paired with improvements aligned with the larger framework plan.

Through their creation of the Living Shoreline Toolkit for Broward County, ESA and APTIM team members have experience with categorizing options for private property owners into four scenarios based on water depth and shoreline characteristics. Our team would look to develop similar scenarios for Captiva residents based on need and homeowner interest. Design elements can be scaled, combined, or tailored for a specific property. Each property would end up with their own site-specific design based on elevation, location and type of emergent and submerged vegetation and the property owner's desired amenities. Unit costs will be provided for each design element so each homeowner can compute their project cost.

Our team recognizes that planning around private docks, mangroves, and seawalls, may necessitate acquiring private property surveys across the island, which represents a potentially time intensive roadblock. Our proposed solution to this is MatterScan's remote sensing and 3D rendering software capabilities. These capabilities expedite the collection and representation of current conditions of individual properties to aid property owners in visualizing design elements in relation to their own backyard compositions. Our team does acknowledge that surveying may be needed for construction and permitting purposes later in the process. If design aspects are not accepted by the majority of individual homeowners, it will be important to also consider nearshore solutions and dedication to acquiring CEPD greater authority.

6. Can you give more detail on how they would handle assessing cost/benefit of adaptation strategies including appropriately valuing environmental services? Can you describe your access to an economist(s) as part of your team? What were the economic/benefit calculations you performed for CEPD in the past?

In the context of our approach to cost/benefit analysis (CBA) for adaptation strategies, our team adopts a meticulous methodology tailored to the specific needs of our clients (example steps are detailed below). For the Captiva Bayside Adaptation Planning project with CEPD, our focus is on providing applied economics that directly align with the project's scope. While we recognize the importance of economists in broad infrastructure projects which would require impacts on tourism,

recreational spending, and commerce etc., APTIM believes that CEPD requires a more targeted approach with an emphasis on property value and insurance rate projections, USACE cost-benefit assessments (USACE, 1994¹), FEMA grant applications (FEMA, 2023²), and engineering cost estimates. Unlike broad economic impact assessments that economists typically conduct, CEPD's needs revolve around specific aspects directly relevant to the project's objectives and private property owners' buy-in. These include understanding return on investment, projecting property value changes, and assessing the value of wetlands (per USACE, 1979³) in the context of adaptation strategies. Our team of engineers, environmental scientist, botanist, and economic ecologists have successfully conducted numerous cost/benefit analyses and are confident to bring their expertise to Captiva Bayside Adaptation Plan project.

Below is APTIM's detailed approach to cost/benefit analysis (CBA) of adaptation strategies:

i. Valuation of Environmental Services (detailed below):

Begin by identifying and defining the specific adaptation strategies under consideration. These could include infrastructure improvements, nature-based solutions, or policy interventions aimed at reducing vulnerabilities and enhancing resilience.

Assign a monetary value to the environmental services provided by the proposed adaptation strategies. This can include the benefits of wetlands in mitigating flooding, preserving biodiversity, and supporting ecosystem services. Valuing these services helps capture the full spectrum of benefits. Valuing environmental services is an appropriate cost-to-benefit factor to consider. From our experience, undervaluing the potential impacts to environmental features or species can bring a project to a gridlock lasting for years, or cost millions of dollars to mitigate. Our team of environmental scientists, botanists, and economic ecologists bring proven experience on this important topic. Developing a priority matrix will provide the CEPD an important and useful tool. Our team would consider items such as the following for the project benefit side of the equation:

- Reduction of known structure repetitive flooding
- Reduction of extended flood duration
- Reduction of current erosion locations
- Reduction of modeled future flooding and/or erosion considering sea level rise
- Provision of multiple benefits
- Inadequacy of transportation systems
- Current land availability
- Operating and maintenance expenditures
- Provision of increased protection from storm surge
- Environmental impact and permit-ability considerations
- Economic issues and inequality such as shifting macroeconomic trends, disadvantaged communities, effects of economic downturn, and cost-to-benefit in terms of number of residents served
- Residual value and remaining service life (relocation may be more cost beneficial than rehabilitation), and
- Innovation technologies and techniques

¹ <https://www.iwr.usace.army.mil/Portals/70/docs/iwrreports/94-PS-2.pdf>

² <https://www.fema.gov/grants>

³ <https://www.iwr.usace.army.mil/portals/70/docs/iwrreports/iwr004-001360-001477.pdf>

- ii. Quantification of Avoided Damages:*
Estimate the potential damages that could occur in the absence of the proposed adaptation strategies. This involves considering the risks associated with extreme weather events, sea-level rise, tidal flooding, and other climate-related threats. Gather comprehensive data on the project area, considering both historical and projected information. This involves assessing climate risks, historical damage records, and relevant socio-economic factors that may influence the project's outcomes. Our proven track record of successfully managing over \$30B in state and federal funds for disaster response and recovery exemplifies our experience in quantification of avoided damages.
- iii. Engineering Cost Estimates:*
Develop detailed engineering cost estimates for the implementation of the chosen adaptation strategies. This includes construction costs, materials, labor, and any other relevant expenses associated with the projects. Our partner, AIM, can provide Construction Management at Risk (CM@R) estimates for infrastructure projects. This provides us with a great resource for updated/timely construction cost data. This quality data provides a key foundation for the cost/benefit evaluations. Especially with recent inflationary spikes and supply-chain shortages, having this in-house real-world economic expertise can mean the difference in projecting a plan and concept projects that are appropriately funded versus delayed due to under-valuated economic understanding.
- iv. Return on Investment (ROI) Analysis:*
Evaluate the return on investment by comparing the costs of implementing the adaptation strategies against the quantified avoided damages and other benefits. This provides decision-makers with a clear understanding of the economic efficiency of the proposed solutions.
- v. Integration of Economic Principles:*
Apply economic principles to the analysis, such as discounting future costs and benefits to present value. This ensures a fair comparison between upfront costs and long-term benefits.
- vi. FEMA Grant Applications:*
If applicable, align the CBA with the requirements of FEMA grant applications. This may involve specific documentation and justification of costs, benefits, and the overall feasibility of the proposed resilience measures.
- vii. Stakeholder Engagement:*
Involve stakeholders in the CBA process to incorporate diverse perspectives and ensure that the analysis reflects the needs and priorities of the community.
- viii. Continuous Monitoring and Updating:*
Recognize that conditions and data may change over time. Implement a framework for continuous monitoring and periodic updates to the CBA, ensuring its relevance and accuracy throughout the project lifecycle.

APTIM team has performed several economic/cost-benefit calculations for CEPD in the past, including Captiva Island 2013-14 and 2020-21 Beach Nourishment Projects Benefit Analysis and Economic Analysis of Lee County, Florida Shore Protection Project, Captiva Island Segment Project

(starting 1988). These assessments included the apportionment plan, quantifications of beach nourishment benefits, engineering cost estimates, return on investment calculations, and quantification of avoided damages (i.e., storm damage reduction benefits). Our partner Dr. William B. Stronge has also conducted the Recreational Use Of Captiva's Beaches And Economic Impact study in 2018 where APTIM provided engineering support and cost estimates.

7. Can you more fully describe their public communication strategies including creating public buy-in for adaptation strategies? This should also include details about the ability to create compelling and accurate visuals as part of their process.

Our public outreach strategy will focus on providing multiple channels for the public to participate, incorporating feedback throughout the project and providing transparency in how concerns are addressed. Four public outreach meetings will be held in person within the community and will have a virtual option to maximize participation island-wide. At the initial meetings, community members will be asked their preferences for adaptation so that our team can tailor and customize design elements to not only meet shoreline protection needs but also to meet the needs and concerns of property owners to the best of our ability. Questions posed to community members will include:

- What level of protection would you like and by when?
- Do you prefer small projects over time?
- Would you like to be a partner? Would you provide easement?
- Do you prefer natural protection or hybrid?

APTIM understands the need for providing access to project information throughout the planning process and will provide online resources, video recordings, and opportunities for virtual interactions to increase participation and gain consensus at key decision points in the project. Community members will be involved in, and informed of, progress throughout the process via digital and physical mailers and an interactive GIS storyboard on the CEPD website and subsequent public outreach meetings. Adaptation strategies will be visualized on a property-by-property basis thanks to MatterScan and Sasaki software and rendering capabilities which allow property owners to envision how strategy implementation will interact with their bayside landscape. Customized renderings and visuals based on existing property conditions allow for immersive, reality-based, visualization which helps to show property owners what projects would look like in their own backyards and demonstrate changes in landscape, experience, or composition of their land. Coordination with Sanibel, Lee County, and the Sanibel-Captiva Conservation Foundation (SCCF), will be crucial to the entirety of our public communication strategy.

8. Describe the importance of Matterscan and Sasaki to the successful adaptation of this project.

MatterScan's cutting-edge technology that captures and documents existing conditions is a key element of our proposed approach that sets our vision for this effort apart. MatterScan has the ability to collect real time data of existing infrastructure and landscapes via ground-based 3D laser scanning at 2mm accuracy and drone-based LiDAR data collection at survey-grade accuracy. This resource efficient capability would enable our team to produce a range of digital 3D model representations ("Digital Twins") of the bayside area of Captiva inclusive of individual backyards and assets. MatterScan's service would lay the visualization groundwork by enabling our additional team members to customize conceptual adaptation drawings based on this recent, localized, data imaging of the islands bayside. Enabling private property owners to visualize concepts and strategies through immersive desktop virtual tours and site-specific tailored renderings would empower them to see the strategies come to life and would increase overall support and buy-in.

MatterScan would work closely with Sasaki, as Sasaki would be responsible, along with Coastal Vista and ESA, with pairing the imagery collected by MatterScan with the conceptual design elements developed by the team to produce customized visuals of strategies. Sasaki's renderings and designs stand out as the most inspiring and beautiful and have compelled community private property owners, stakeholders and regulators to implement and celebrate living shoreline projects statewide. They have led the design and visioning for the award-winning landmark shoreline redevelopment projects in Sarasota, Key West, and along the Atlantic. Sasaki was included as a distinguished member of the APTIM team because they are an expert in generating conceptual adaptation strategies and renderings that our team believes will immerse the CEPD, residents, and commercial interests in our visions for your future.

9. Do you have drone capability and certifications?

APTIM embraces innovative technologies and approaches in all of our professional disciplines. We believe that our team's use of UAS technology may be of value to the CEPD on this project. APTIM owns and operates state-of-the-art data acquisition and processing tools, including DJI Phantom & Inspire Drones, FARO X330 Laser Scanner, and Teledyne Blueview Echosounder.

High-resolution drones, lasers scans and multibeam data can also be used to provide dense full 3D data and imagery of coastal structures and for monitoring or inspection purposes, or as a resource for public outreach. We have remote sensing staff that specialize in working with multiple topographic and bathymetric datasets to create seamless digital elevation models (DEMs) that are often critical for accurate geomorphic change analysis. An example use of this innovative technology was at the South St. Lucie Inlet Jetty in Martin County where APTIM measured stone size and relative stability using drone imagery.

APTIM also offers an unmanned aerial systems (sUAS) service that is a full end-to-end solution where APTIM's six (6) licensed and FAA certified UAV pilots conduct the flights/surveys, process all the data in-house, and deliver actionable data and media to its customers. From surveying and 3D modeling to structural inspections, our clients are turning to our sUAS solutions to save time and acquire data they've never had access to before. MatterScan has 2 full-time FAA 107 Certified Commercial Drone pilots on staff as well as several commercial-grade drones at the ready.

10. Describe Richard Grosso's experience in this type of project.

Richard Grosso is a widely recognized lawyer and advocate, with 35 years of experience as a public interest litigator, appellate lawyer, advocate and counselor in the areas of federal and Florida environmental, land use, constitutional, property rights and related governmental and administrative law. He offers services throughout Florida and in Washington DC. His experience with land use regulation, environmental policy, permitting and sea level rise are very relevant to the project.

Mr. Grosso is a former Law Professor at the Shepard Broad College of Law at Nova Southeastern University in Ft. Lauderdale, Florida, where he taught in the areas of environmental, energy, land use, administrative, appellate practice and federal and state constitutional law. He is the former Executive Director and General Counsel of the Everglades Law Center, Inc., (ELC) a public interest law firm which represents citizens and environmental interests in environmental and land use matters concerning the Florida Everglades, Florida Keys and the south Florida ecosystem in general. He is also a former Legal Director for 1000 Friends of Florida, and attorney for the Florida

departments of Community Affairs and Environmental Regulation. Over a 34 year litigation and appellate career, he represented numerous public interest clients and the state of Florida in federal and state administrative and judicial proceedings. He frequently appears before local governments, state and federal agencies, and other bodies concerning land use and environmental issues.

Mr. Grosso has worked extensively on the local, state and federal policy, legal and agency decision-making aspects of the Comprehensive Everglades Restoration Plan, cutting edge "carrying capacity" land use planning in the Florida Keys, climate and sea level rise sustainability issues in south Florida and a wide variety of environmental and land use issues throughout Florida. Mr. Grosso's work and analysis has been quoted or referenced in the New York Times, the Washington Post, Forbes, Politico, National and Florida Public Radio, in almost every major news media in Florida, and other newspapers and blogs across the country and around the world.

Mr. Grosso also co-authored an influential amicus curie brief in the ground-breaking case of Brevard County v. Snyder, Florida's leading land use law case. Among Professor Grosso's notable publications are:

- Richard Grosso, A Guide to Development Order "Consistency" Challenges Under Florida Statutes Section 163.3215, 34 J. of Env'tl. L. & Litig. 129 (2019).
- Planning and Permitting to Reduce and Respond to Global Warming and Sea Level Rise in Florida, J. Land Use & Env. Law., Vol 30, No. 2, 201 (Spring 2015).
- Planning and Permitting to Reduce and Respond to Global Warming and Sea Level Rise, 6 J. Animal and Environmental L. 41 (2015).
<https://drive.google.com/file/d/0B0gclmiUSq5ETIVZSW1melFzcm8/view?pref=2&pli=1>
- Regulating for Sustainability: The Legality of Carrying Capacity – Based Environmental and Land Use Permitting Decisions, 35 Nova L. Rev. 711 (Summer 2011).
- The Public Interest Perspective on SB 360, Fla. Bar Journal, Oct. 2009, at 24.
- Richard Grosso & Jason Totoiu, Planning and Permitting to Protect Wetlands: The Different Roles and Powers of State and Local Government, Fla. Bar Journal, Apr. 2010, at 39.
- Old McDonald Still Has a Farm: Agricultural Property Rights After the Veto of S.B. 1712, Fla. Bar. J., March, 2005, Volume 79, No. 3 (co-author with Robert Hartsell).

Mr. Grosso has been widely recognized for his work on behalf of Florida's environment, including:

- Audubon Florida's 2021 Everglades Champion Award.
- Lifetime Achievement Award (2010 Fla. Bar, Environmental and Land Use Law Section's Public Interest Environmental Conference). The Urban Environmental League's (Miami-Dade County) Orchid Award for Lawyers Who Make a Difference (2009).
- The Bill Sadowski Memorial Public Service Award by the Florida Bar, Environmental & Land Use Law Section (2008).
- The Tropical Audubon Society's Polly Redford Citizens Service Award or his legal work on behalf of the environment (2008).
- The Sierra Club Florida chapter's William K. 'Red' Howell Legal Services Award (2005).
- Named Most Effective Environmental Lawyer in south Florida, Daily Business Review (2004).
- Conservationist of the Year (Marshall Foundation 2003).
- Conservationist of the Year (Everglades Coalition 2002).
- Conservationist of the Year (Audubon Society of the Everglades 2001).
- Public Service Award (Martin County Conservation Alliance 2000).
- Environmentalist of the Year (CityLink Newspaper [Broward & Palm Beach Counties] 2000).

- Conservationist of the Year. Florida Wildlife Federation (1999).
- Hal Scott Memorial Award for legal advocacy on behalf of the environment (Florida Audubon Society 1997).
- Individual of the Year (Key West environmental group Last Stand 1995).

11. What do you consider short term and long-term actions that will support bayside protection?

Short-Term Actions:

1. *Living Shorelines and Armored Shoreline Enhancement Projects:*

Maintain a minimum amount of greenspace (pervious area) per property for stormwater runoff. Initiate living shorelines and seawall enhancement projects that involve grading, fill placement, and the implementation of shoreline stabilization measures, including sills, revetments, and offshore breakwaters. Utilize hybrid solutions including limestone rip rap, precast concrete wave attenuation units, and oyster bag pyramids or arrays for immediate protection upon installation. These elements protect the longer-term actions during the establishment period.

2. *Establish Clear Facts and Community Engagement:*

Undertake a comprehensive assessment of current and future risks, identifying properties most at risk, analyzing flow paths into the community, and understanding the impact of changing climate projections. Inform homeowners on the benefits to their properties of mangrove and marsh stabilization plantings. Engage the community in a collaborative effort to establish a shared understanding of these risks and foster a sense of unity around common goals.

3. *Risk Communication:*

Develop clear and transparent communication strategies to convey the urgency of short-term actions. Highlight the immediate protection provided by living shorelines and seawall enhancements, emphasizing the importance of these measures in safeguarding the community during the establishment period.

Long-Term Actions:

1. *Policy Implementations:*

Enact policies in partnership with the County that mandate the incorporation of specific design strategies for bayside protection upon property redevelopment. This could include requirements for the preservation of existing greenspace, the integration of nature-based solutions, and adherence to sustainable building practices.

2. *Native Estuarine and Dune Species Planting & Oyster Spat Recruitment and Growth:*

Implement planting of native estuarine and dune species. This contributes to the development of resilient ecosystems, providing enhanced protection against rising sea levels and fostering biodiversity. Also facilitate the recruitment of oyster spat on precast structures and oyster bags. This long-term strategy involves the growth of vegetation and oyster colonies, providing a flexible and continuously evolving level of protection that adapts to changing environmental conditions.

3. *Community Trust Building:*

Establish a communication plan that outlines the timing of improvements and regularly communicates successes achieved through implemented strategies. This ongoing dialogue is

crucial for maintaining community trust, ensuring transparency, and demonstrating the positive impacts of long-term actions.

Our goal is to incorporate these short-term and long-term sustainable actions into the future Captiva Island Redevelopment Code/Lee County Land Development Code through:

1. *Specific Design Standards:*
Specify design standards within the redevelopment code that mandate the incorporation of living shorelines, seawall enhancements, and the use of specific materials like concrete seawalls and oyster bags. Establish guidelines for the integration of native estuarine and dune species in landscaping plans.
2. *Risk Assessment Protocols:*
Integrate protocols for risk assessment into the redevelopment code, requiring property developers to assess and report on the vulnerability of their projects to changing climate conditions. This ensures a standardized approach to risk evaluation and adaptation planning.
3. *Community Engagement Requirements:*
Include provisions in the redevelopment code that mandate community engagement during the planning and implementation phases. Developers should be required to engage with residents, sharing information about risks, proposed actions, and the expected benefits of short-term and long-term strategies.
4. *Monitoring and Reporting Standards:*
Establish monitoring and reporting standards within the redevelopment code to track the progress and effectiveness of implemented measures. Regular reporting on the success of living shorelines, vegetation growth, and oyster colonization will contribute to community trust-building efforts.

12. Can you explain the reference to the project taking decades to complete a large-scale project in your presentation?

This statement referred to the necessary maintenance of any project elements constructed by CEPD on sovereign submerged lands. Maintenance or adaptation may be required every 10 years or after a storm event to ensure the project still meets the design standard.

The adaptation plan should support implementation of projects today and into the future. Property owners that do not participate in projects initially, may change their minds as tidal flooding and sea level rise increases or storms occur and so they may participate in future decades.

13. How long has permitting and construction taken in your other projects once a plan is approved?

Developing the Plan takes 3-6 months depending on data collection efforts (should be seagrass growing season) and working with stakeholders. Permitting can be anywhere from 3 months to 12 months depending on the project type. If the project qualifies for a USACE Nationwide permit review times will be shortened. If the project does not require consultation with State Lands; no easement required or if we are using an existing submerged lands easement, review times are shorter. Construction usually follows permitting by 2-3 months, needing 30 days to advertise and procure the project, 14 days to review bids, make a selection and then present a recommendation to the Board at the next scheduled meeting. Depending on the size of the project and permitting limits on construction timeframes (turtle nesting season, construction has lasted 2-7 months.

Typically, anything longer than 6-7 months and the contractor may phase the project and remobilize to finish the next calendar year.

14. Have you applied WEDG standards in other projects you completed?

Yes, our team has successfully implemented WEDG standards in prior projects. Specifically for our shoreline stabilization projects, we extensively utilized methods identified with high habitat values (greater than 2) from Appendix B – Tables 1 & 2 of WEDG Manual Version 3.0 (pg 148-150). Please refer to the “WEDG Standards Checklist.xlsx” spreadsheet attached to this response.

The WEDG standards and guidelines align seamlessly with our overarching methodologies for resilience and shoreline stabilization projects. This integration is a deliberate effort to ensure that our projects not only meet but exceed environmental and habitat preservation expectations. We are proud to have several WEDG certified professionals within our team, intimately familiar with the WEDG verification and scoring system. This expertise empowers us to confidently bring the WEDG standards to the forefront of the CEPD projects, ensuring a thorough and meticulous adherence to the established standards.

15. Which commission are you referring to on page 2 and page 8 of your proposal?

Should read “District”

16. What is the Comprehensive Island-wide Management Plan you referenced on page 8?

Should read “Comprehensive Beach and Shore Preservation Program”

17. How long have you worked with your subs and how many projects have you done with them?

APTIM has a rich history of collaboration with our subcontractors, each bringing unique expertise to our projects. One longstanding partnership is with **ESA**, dating back to 2007 when APTIM, operating as Coastal Planning & Engineering, Inc. at the time, initiated a collaboration with ESA. ESA and APTIM executed Master Services Agreement in 2020 that allows us to quickly execute tasks for either company. Staff from ESA and APTIM have collaboratively worked on a variety of projects involving permitting, mitigation, monitoring and water quality for four (4) main clients.

Coastal Vista Design is another valued collaborator, with our engagement commencing in 2020 on the Lee County Sanibel Causeway Islands redevelopment project. Serving as the Landscape Architect through September 2022, Coastal Vista Design played a pivotal role in this endeavor. Despite facing the challenges posed by Hurricane Ian, the project transitioned seamlessly to the FDOT for post-hurricane repairs, showcasing the resilience of our collaboration. Looking ahead, we are eager to continue our partnership with Coastal Vista Design, anticipating further opportunities to contribute to impactful shoreline design solutions.

MatterScan has been an instrumental partner for APTIM over the past four years, participating in various projects such as the State of Louisiana Coastal Protection and Restoration Authority restoration of “Golden Triangle”; U.S. Army Corps of Engineers St. Louis FUSRAP Remediation Project; Exelon Edge Moor Landfill Site; Army FSC Huntsville for the Recurring Maintenance and Minor Repair (RMMR) DOD Facilities scanning. Angela Belden, a key member of MatterScan, previously worked with Coastal Planning & Engineering, a legacy APTIM company, further strengthening our ties. Her substantial contributions to the development of permits, plans, and specifications for renourishment projects have been invaluable. This long-standing partnership with

MatterScan exemplifies our commitment to fostering enduring relationships with our subcontractors and leveraging these strong ties in Captiva Bayside Adaptation Planning.

APTIM is also excited to introduce new members to our team for the Captiva Bayside Adaptation Planning project, namely **Sasaki and AIM**. Although we haven't directly worked together on previous projects, APTIM has engaged with AIM and Sasaki in several discussions over the past few years, expressing mutual interest in working together. The Captiva Bayside Adaptation Planning presented a perfect opportunity to actualize these conversations and leverage the collective strengths of our diverse team. Both AIM and Sasaki bring unique strengths that complement our team. AIM's role as Lee County's Flood Planning and Adaptation consultant, coupled with their established success in the county, enhances our capabilities and strengthens our ties to local government. Sasaki's expertise in creating vivid renderings and visuals, combined with their regional experience in shorelines and private property projects, adds a valuable dimension to our collaborative efforts. As we embark on this new venture, we are confident that the synergy among our team members will yield innovative and effective solutions for Captiva's bayside adaptation planning.

18. If you feel any clarification is needed outside of questions asked in this document, please provide your comments.

Nothing further. Thank you!

WEDG Standards v3.0 - October 2023

CATEGORY 0: SITE ASSESSMENT & PLANNING (Category Total: 32 Points)

- CREDIT 0.1 Enlist a Multidisciplinary Project Team
- CREDIT 0.2 Assess Sitewide Social and Ecological Context and Vulnerabilities
- CREDIT 0.3 Develop and Implement a Plan for Equitable Stakeholder Engagement
- CREDIT 0.4 Create a Maintenance and Adaptive Management Plan

CATEGORY 1: CLIMATE AND HAZARD RESILIENCE (Category Total: 45 Points)

- CREDIT 1.1 Avoid or Reduce Flood Risk from the Waterbody
- CREDIT 1.2 Reduce Pluvial Flooding and Stormwater Discharge
- CREDIT 1.3 Improve Stormwater Discharge Quality
- CREDIT 1.4 Establish an Emergency Preparedness and Response Plan
- CREDIT 1.5 Reduce Contribution to Urban Heat

CATEGORY 2: COMMUNITY ACCESS & CONNECTIONS (Category Total: 69 Points)

- CREDIT 2.1 Provide Quality Public Access Areas on the Waterfront
- CREDIT 2.2 Design Sites to Improve Visual and Other Sensory Connections to the Water
- CREDIT 2.3 Support Industrial Water-Dependent Uses
- CREDIT 2.4 Reduce Industrial Impacts to Human Health and Wellbeing
- CREDIT 2.5 Provide Diverse Programming and Passive Educational Features
- CREDIT 2.6 Increase Transportation Access to the Waterfront
- CREDIT 2.7 Create Maritime or Environmental Employment Opportunities
- CREDIT 2.8 Increase Waterfront Pathway and Greenway Connectivity
- CREDIT 2.9 Provide Direct Connections to the Water for People and Boats
- CREDIT 2.10 Support Diverse and Sustainable Maritime Activity

CATEGORY 3: EDGE COMPOSITION (Category Total: 29 Points)

- CREDIT 3.1 Choose an Appropriate Edge Composition for the Context and Intended Use
- CREDIT 3.2 Maintain or Emulate Natural Shoreline Shape and Slope
- CREDIT 3.3 Protect the Working Edge
- CREDIT 3.4 Ecologically Enhance Structural Components

CATEGORY 4: NATURAL RESOURCES & SUSTAINABILITY (Category Total: 63 Points)

- CREDIT 4.1 Site with Ecological Sensitivity
- CREDIT 4.2 Create, Restore, or Maintain Habitats and Ecosystem Services
- CREDIT 4.3 Preserve and Increase Ecosystem Connectivity
- CREDIT 4.4 Support Native Habitat Complexity and Biodiversity
- CREDIT 4.5 Avoid Human Disturbance to Natural Resources
- CREDIT 4.6 Redevelop and Clean Up Degraded Sites
- CREDIT 4.7 Practice Sustainable Fill and Soil Management
- CREDIT 4.8 Use Renewable and Resilient Energy Sources
- CREDIT 4.9 Reduce Emissions through Carbon Management
- CREDIT 4.10 Practice Environmentally Responsible Construction
- CREDIT 4.11 Reduce Water Use
- CREDIT 4.12 Engage a Partner to Study or Monitor the Site

CATEGORY 5: INNOVATION (Category Total: 12 Points)

- CREDIT 5.1 Inventive Design
- CREDIT 5.2 Exemplary Performance

Summary	WEDG Verification requires at least 130 total points
Category 0	Site Assessment & Planning
Category 1	Climate & Hazard Resilience
Category 2	Community Access & Connections
Category 3	Edge Composition
Category 4	Natural Resources & Sustainability
Category 5	Innovation
Total Score	

Have you applied these steps in your projects? (Yes/No)

Max Possible Points	Coastal			
	APTIM	ESA	Vista	Sasaki
6	Yes	Yes	Yes	Yes
10	Yes	Yes	Yes	Yes
10	Yes	Yes	No	Yes
6	Yes	Yes	Yes	Yes
15	Yes	Yes	Yes	Yes
16	Yes	Yes	Yes	Yes
4	Yes	Yes	Yes	Yes
4	Yes	Yes	No	No
6	No	Yes	Yes	Yes
12	Yes	Yes	Yes	Yes
6	Yes	Yes	Yes	Yes
6	Yes	Yes	No	No
4	Yes	No	Yes	Yes
7	Yes	Yes	Yes	Yes
6	Yes	Yes	Yes	Yes
9	Yes	Yes	No	No
6	Yes	Yes	No	Yes
6	Yes	Yes	Yes	Yes
7	Yes	Yes	Yes	Yes
12	Yes	Yes	Yes	Yes
6	Yes	Yes	Yes	Yes
7	Yes	Yes	Yes	No
4	Yes	Yes	Yes	Yes
6	Yes	Yes	Yes	Yes
11	Yes	Yes	Yes	Yes
6	Yes	Yes	Yes	Yes
6	Yes	Yes	Yes	Yes
4	Yes	Yes	Yes	Yes
6	Yes	Yes	Yes	Yes
4	Yes	Yes	Yes	Yes
4	No	Yes	No	No
4	Yes	Yes	No	Yes
4	Yes	Yes	Yes	Yes
4	No	No	Yes	Yes
4	Yes	Yes	Yes	Yes
6	Yes	Yes	?	???
6	Yes	Yes	?	???

Possible Points
32
45
69
29
63
12
250



Vendor Reference Verification Form for RFPs, RLLs and RFQs

Organization/Firm Name providing reference: **City of Miami**
 Contact Name: **Keith Ng**
 Title: **Sr. Project Manager, Office of Capital Improvements** Reference date: **11/17/2023**
 Contact Email: **keithng@miamigov.com** Contact Phone: **305-416-1298**
 Name of Referenced Project: **Jose Marti Adaptive Re design Project**
 Contract No. **RFQ 17-18-061** Date Services Provided: **10/23/2019**
 Project Amount: **\$1,523,220.00**
 Vendor's role in Project: **Prime Vendor** **Subconsultant/Subcontractor**
 Would you use this vendor again? **Yes** **No**
 If No, please specify:

If Subconsultant/Subcontractor, would you consider employing this vendor as the prime vendor?
 Yes **No**
 If No, please specify:

Description of services provided by Vendor:

Civil Design aspect of the project that include drainage road improvements, seawall design and permitting.

Please rate your experience with the referenced Vendor:

	Unsatisfactory	Satisfactory	Excellent	N/A
1. Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project completed within budget	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Cooperation with:				
a. Your Firm	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Subcontractor(s)/Subconsultant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Regulatory Agency(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cummins Cederberg - Lake Worth Inlet Flood Shoal Dredging Project



Vendor Reference Verification Form for RFPs, RLI's and RFQs

Organization/Firm Name providing reference: *Palm Beach County ERM*
 Contact Name: *Eric Anderson*
 Title: *Construction Project Manager*
 Contact Email: *eranderson1@pbcgov.org*
 Name of Referenced Project: *Lake Worth Inlet Flood Shoal Dredging Project*
 Contract No. *NA*
 Project Amount: *\$191,305*
 Vendor's role in Project: **Prime Vendor** **Subconsultant/Subcontractor**
 Would you use this vendor again? **Yes** **No**
 If No, please specify:

Reference date: *12/5/2023*
 Contact Phone: *561-233-2514*
 Date Services Provided: *2018-2022*

If Subconsultant/Subcontractor, would you consider employing this vendor as the prime vendor?
 Yes **No**
 If No, please specify:

Description of services provided by Vendor: *Permitting, Engineering, Design for the Lake Worth Inlet Flood Shoal Dredging Project.*

Please rate your experience with the referenced Vendor:

	Unsatisfactory	Satisfactory	Excellent	N/A
1. Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project completed within budget	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Cooperation with:				
a. Your Firm	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Subcontractor(s)/Subconsultant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c. Regulatory Agency(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

December 5, 2023

RE: Captiva Bayside Adaptation Plan

Responses to Questions

On behalf of the Cummins Cederberg team, we are pleased to present our responses to the Captiva Island Bayside Adaptation Plan, our team is excited for the opportunity to work with you and the bayside property owners of Captiva Island to plan your roadmap to adaptation. There are many discrete avenues all contributing to your end goal of a Bayside Adaptation Plan that addresses:

- combined flooding risk from sea level rise, storm surge, rainfall and combination flooding; explore strategies to decrease or mitigate inundation, reduce erosion and subsequent damage from flooding
- enhance/integrate with current and planned stormwater management projects on the island

The Captiva Island Erosion Protection District is uniquely positioned to establish a framework for near and short-term adaptation that involves many private owners riparian to the ecologically rich Pine Island Sound Aquatic Preserve. The toolbox for your project is broad and includes innovative shoreline projects and forward-thinking policy recommendations. Part of the solutions extend below the water line onto the sovereign submerged lands of the aquatic preserve, and part of the solutions involve private land adjacent to the water.

We would be pleased to go into greater detail in person with you and your Commission, especially as we move into scoping meetings. In the meantime, we respectfully request you delay the release of this document to the public and our competitor until a decision is made by CEPD on the solicitation. This is a customary practice with the Consultant's Competitive Negotiation Act (CCNA) solicitations from cities and counties in Florida, which are also bound by Florida's Sunshine Law during a professional services procurement process. Thank you.

1. What do you feel is the largest obstacle for CEPD to overcome in this project? Why? How do you plan to overcome this obstacle?

In no order, your largest obstacles are:

- Designing nature-based flood protection guidelines that have minimal impact to existing seagrass, existing mangroves, and encroachment onto private property.
- Gaining permission from the private riparian owners for CEPD to construct projects in the nearshore area. Riparian and/or construction easements, and willing upland private property owners, will be important for any pilot project CEPD would like to undertake.

- Permitting nature-based solutions along the shoreline in the aquatic preserve because of the benthic resource issues and the need for projects to be “clearly in the public interest”. Whether the applicant is public or private, and the project is regional or parcel-by-parcel, can significantly affect the permitting strategy.
- Enforcing any proposed ordinances such as a resilient shoreline ordinance or a tidal flood-barrier elevation ordinance, should they be adopted. Enforcement takes staff (internal or outsourced) to review compliance and/or plans, and additional budget.

The Bayside Adaptation Plan for Captiva’s shorelines will include conceptual project designs and alternatives for the various types of shorelines with prioritized projects indicating where and when they need to be constructed. We are experienced in ‘threading the needle’ with nature-based solutions when space is at a premium either because of upland development or nearshore resources, including in multiple aquatic preserves across Florida. There is no one-size solution for all communities nor for all parcels within a community. Your solutions will be Captiva-specific and will balance the needs and concerns of CEPD, riparian private property owners, and other stakeholders.

We intend to overcome these hurdles in a variety of ways including diverse methods of communicating with the public, and a clear message about the costs and benefits of adaptation. Part of the adaptation planning may include establishing the permitting framework with the state and federal government using an innovative strategy that allows CEPD to set the intent and framework of how the shoreline adaptation will look and function and address the public interest test criteria and any other net ecological benefit that may be required. Private property owners reluctant to grant CEPD permission to construct the projects in their riparian areas could later obtain their own permits under the CEPD framework. As Project Manager, I (Danielle Irwin) intend to use my years of niche experience while at FDEP to stretch the regulatory and proprietary rules controlling the authorization of shoreline project(s) to assist CEPD in creating an implementable plan. Furthermore, our team brings much experience to the table in terms of funding projects, assisting coastal special taxing districts such as inlet management districts in Florida, and being creative in constrained spaces.

2. Will the project be designed to WEDG standards?

The WEDG principles of resilience, ecology, and access to water will be applied to the project including the public outreach, assessments, design of nature-based hybrid solutions, and maintenance considerations of the shoreline solutions.

3. What role did you have in receiving the WEDG recognition for the Jose Marti Park project?

Cummins Cederberg preliminarily reviewed the WEDG guidelines and manual to gauge credential feasibility (i.e., potential number of points), to inform the project team of the requirements and efforts needed for a complete application submittal, and to identify which credits would be addressed by the applicant (City of Miami) and which should be

addressed by the various project consultants. Cummins Cederberg assisted in establishing and maintaining a WEDG credit tracking system for use by the multi-disciplinary consultant team working on the project. We also attended multiple pre-application meetings with Waterfront Alliance staff to ensure the application preparation strategy would meet WEDG requirements prior to submittal.

Our team provided narratives for the application package relative to the coastal components and design of the project which included summarizing previously performed surveys and analyses (e.g., benthic survey, bathymetric survey, etc.) as well as conducting additional analyses (e.g., flood inundation modeling) and creating new exhibits that were a specific requirement of WEDG. Cummins Cederberg also reached out to stakeholders and academic research institutions to discuss potential collaborations and partnerships that the City of Miami could utilize to meet certain WEDG credits.

Cummins Cederberg has eight (8) WEDG Associates certified under the Waterfront Alliance's WEDG rating system. We regularly use the tools learned from WEDG on most of our shoreline projects.

4. Do you have landscape architects to design living shorelines?

Understanding the coastal dynamics is crucial to designing living shorelines, and our team includes experienced marine scientists, professional wetland scientists, oceanographers, geologists, green infrastructure designers, and coastal engineers who have worked collaboratively on nature-based shoreline solutions in Florida for many years. Having a landscape architect on the team is a bonus. Chen Moore and Associates will be providing our team's landscape architecture support.

5. How long have you worked with your subconsultants and how many projects have you done with them?

We have longstanding working relationships with our subconsultant team on many similar successful projects.

- Our principals have been working with the Chen Moore team for over 10 years and have worked on over 15 projects together.
- Our relationship with Spencer Crowley at Akerman LLP is over 10 years old and we have collaborated on over 25 projects together.
- We have been collaborating with The Balmoral Group for over 6 years on more than 15 projects.
- Our team members have known Cheryl Hapke for many years, including one of whom has served with her on the Tampa Bay Regional Planning Council Resilient Shorelines and Spaces Workgroup since circa 2019. While our relationship with Fugro is newer, we look forward to working with them on this project.

6. How many conceptual adaptation drawings and renderings do you anticipate creating?

We will build on previous conceptual renders to further evaluate alternatives. We anticipate a variety of alternatives across the living and hybrid spectrum of shoreline solutions representative of the diversity of parcel shoreline types on Captiva Island's bayside. The specific number of concepts and renderings will be collaboratively decided upon during the scoping meetings following CEPD's team selection for this project.

7. Does your bid include the utilization of 3d imaging?

We have the capability to produce innovative 3d renderings to visualize the proposed shoreline solutions. The degree of use and involvement of 3D renderings will be identified during scoping meetings.

8. Given the diverse shoreline of each individual bayfront property (some homeowners have docks, mangroves, seawalls, etc.), how will you approach design aspects that may require major changes for individual homeowners?

Conceptual solutions will contemplate the various private uses of the shoreline including allowing for private docks, where/when existing seawalls may need to be modified, and possible addition of mangrove areas while maintaining a viewshed by trimming in the long-term. Adaptation strategies will seek to minimize encroachment onto private property. Near-term projects will depend on having voluntary riparian private owners. The adoption of a resilient shoreline ordinance or a tidal flood barrier ordinance will then address non-voluntary owners will be brought along when a trigger is met such as new or major renovation to the existing shoreline or each parcel. The policy route is a slower, longer-term strategy than the construction or projects in the near-term, but still an important tool to include.

9. How do you expect to get buy-in from reluctant private landowners?

Gaining buy-in from reluctant private landowners will include communication, education, and outreach, as well as solid explanations of the cost-benefit assessment understandable by lay people. Various communication methods will be used – print, verbal, graphic, 3D, easily accessible online tools / dashboards, and workshops / public meetings. In my experience, it is often not possible to get buy-in from all reluctant landowners along a regional project such as a beach or dune project – those same hurdles can be expected on your bayside. Using a carrot and a stick approach will likely both be needed. The 'carrot' is having CEPD do the heavy lifting on design guidelines and regulatory framework with state and federal permitting agencies and possibly providing a funding source. The 'stick' will likely be through the adoption and implementation of local ordinances that have a compliance trigger.

10. What do you consider short term and long-term actions that will support bayside protection?

Short term actions include developing the shoreline adaptation plan, installation of nature-based flood protection along the shoreline where permission from riparian owners can be

gained and setting up the permitting 'easy buttons' for private property who delay their participation in upfront projects.

Long term actions will include adopting relevant ordinances, establishing the funding stream for future projects such as through grants, possibly increasing staffing / budget through increases to the ad valorem tax revenues, monitoring the success of adapted or planted mangrove and other nature-based solutions especially following storms, and construction of projects by private landowners.

11. Can you give more detail on how they would handle assessing cost/benefit of adaptation strategies including appropriately valuing environmental services? Can you describe your access to an economist(s) as part of your team?

Our team includes The Balmoral Group (TBG), a preeminent economics firm seasoned in helping public and quasi-public entities understand, communicate, and plan for improved coastal resilience. As part of our team, TBG will provide important information to feed the public communication strategy. The cost benefit analysis includes both direct, or "cash", out-of-pocket, costs, as well as indirect and non-market costs and benefits. Benefits may include variation in ecosystem services if alternatives present differing impacts to the environment.

Past coastal adaptation strategies, depending on spatial and engineering factors, have considered various benefits such as the Public Willingness to Pay for flood protection, preservation of habitat, effects on water access and recreation, impacts to nearshore resources, and similar factors. TBG uses peer-reviewed literature values to identify the most appropriate economic values for the analysis at hand. For context and sensitivity analysis, they apply professional judgment and explain how results may differ if other sources had been used, and whether that would result in higher or lower cost-benefit ratios. This step is important to ensure results withstand scrutiny.

In addition, TBG often finds that a strategy may be very cost-effective in one neighborhood and yet not in another just a few streets away, due to various geospatial factors. TBG uses maps and color-coding to help demonstrate economic effects from the analysis, which complement charts and tables that may be less tangible to residents and property owners.

12. Can you more fully describe their public communication strategies including creating public buy-in for adaptation strategies? This should also include details about the ability to create compelling and accurate visuals as part of their process.

Cummins Cederberg has developed proven public communication strategies to create public buy-in that we leverage on many of our public and private projects. Our projects typically require managing the concerns of multiple stakeholders, including residents, owners, municipal employees, and non-profit organizations. Cummins Cederberg can organize, moderate, or participate in workshops or meetings as part of a public outreach

plan. Our marketing team can also organize print media notifications and digital campaigns (e.g., email blast, social media) to notify the public of the District's plan and/or specific coastal projects. We have conducted numerous outreach events to describe and solicit input from stakeholders for sea level rise planning assessments and coastal and marine projects. Our team has significant experience with public outreach for neighborhood-wide projects to large condominium waterfront projects, where board meetings with more than 50 people are very common. We also commonly work one-on-one with individual homeowners so can bring a personalized touch, which Captivans will appreciate as projects are implemented. Specific details, strategy, and level of effort will be agreed to during the scoping meeting.

13. How long has permitting and construction taken in your other projects once a plan is approved?

Permitting and construction timelines are project-specific and are controlled by a myriad of factors that must be considered early and addressed through sound technical analyses, negotiation, and oversight. The location and size of a shoreline project is paramount to properly estimating the permitting timeline for a project. Also, our in-house team of former regulators would give the District direct access to industry experts who can navigate the regulatory process as quickly as possible. By spending more effort upfront evaluating regulatory feasibility, Cummins Cederberg can facilitate implementation and permitting for more quickly implementing projects under the plan.

Projects below the Mean High Water line are generally sovereign and require permission by the FDEP (acting as landlord of the submerged land) and the riparian owners (depending upon how close the project footprint is to the present day shoreline). Should CEPD pursue the project permits, acquiring satisfactory evidence of sufficient upland interest from the riparian upland owner may delay the permitting process. Projects located below the High Tide Line are within the jurisdiction of the U.S. Army Corps of Engineers (Corps), which can significantly increase permitting time as additional studies to quantify impacts to submerged resources and flushing studies to evaluate water quality impacts may be required. We have seen both Corps permitting, and FDEP permitting, take 12-18 months. Further, mitigation negotiations may be required if impacts are anticipated, which could lengthen the timeline. Projects sited between the High Tide Line and Mean High Water may qualify under a Corps nationwide permit and only require a "No Permit Required" letter from the FDEP. This type of permitting could reduce the timeline to 3-4 months. Upland projects only requiring local Building Department permits are typically handled by the Contractor and local municipality but could range from 1-2 months.

Similar to permitting, construction times vary greatly depending on the scope of the project. While a small residential seawall could take 1-2 months to construct, larger shoreline stabilization projects could take 6-12 months, or even longer. Cummins Cederberg employs multiple tools to allow construction to go as smoothly as possible. We perform constructability reviews throughout the design process to ensure what we are

designing can be built. We engage potential contractors early to identify design components that are high-risk, which may slow a project or increase costs. We also review contractor bids to make sure our clients are hiring qualified contractors who are capable of completing the work in a safe, efficient, professional, and competent manner.

14. Based on the previous meetings and discussion please provide any clarification that is needed outside of questions asked in this document.

Our team is the most appropriate choice for a project of this nature. Our team is experienced in the back bay strategies where typical beach nourishment design concepts are not applicable. We are unique because we are working on projects that have moved beyond the planning phase and into permitting, design, and most importantly construction, many of which are based on resiliency studies and adaptation plans we developed. This experience has allowed us to identify critical design and permitting constraints that must be addressed early on, rather than during construction when budget and schedule overruns could arise. Cummins Cederberg leads the most qualified team to develop Captiva's adaptation plan and provide resiliency now and in the future.