RFP #20250641

*STATEMENT OF QUALIFICATIONS*

# Impact Fee Study

FOR TRANSPORTATION, PARKS, LIBRARY, LAW ENFORCEMENT, EMS, FIRE, JAIL AND PUBLIC BUILDINGS

SEPTEMBER 25, 2025


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# Cover Letter

Purchasing Division
Suite 344
Charlotte County
Administration Center
18500 Murdock Circle
Port Charlotte, FL 33948-1094

**RFP #20250641**
IMPACT FEE STUDY

**Charlotte County**
***at a glance***
*Ranked out of 67 Florida Counties:*

- **Population:** 27th
- **Projected Population Growth Rate:** 14th
- **Residential Permitting (2024):** 16th

September 25, 2025

**Charlotte County - Purchasing Division**

Ms. Chamberlain:

Benesch is a professional services firm with a nearly 35-year-long track record of developing and updating impact fees and providing related services to various jurisdictions throughout Florida. Project Manager ***Nilgün Kamp, AICP*** has provided over 450 funding and impact fee studies to clients throughout the country, including Charlotte County. The Benesch team's experience and expertise offer Charlotte County the following benefits:

- ***Extensive Impact Fee Experience:*** Our Public Finance practice is based in Florida and has been involved in all aspects of impact fees for the past 35 years. We have conducted studies through multiple economic cycles for communities with a wide range of demographic characteristics. Through our past and ongoing studies, we know how different issues are addressed by different jurisdictions throughout Florida. All of this information and our insight will be available to the County.

- ***Regional Insight:*** We prepared impact fee studies for Charlotte County in 2013 and 2014, which were successfully adopted. Additionally, our ongoing work in neighboring counties has given us a deep understanding of the region's economic and demographic development trends. Through our work with both Lee County and Collier County, we are highly familiar with the local conditions, growth patterns and infrastructure needs that also influence Charlotte County. Our previous experience with the Charlotte County impact fee program, along with this regional perspective, allows us to bring vast knowledge of trends and conditions that will be critical to the successful impact fee update study for the County.

- ***Comprehensive Knowledge from a Full-Service Team:*** In addition to impact fees, Benesch specializes in growth management issues, land development regulations, transportation and school concurrency. We have prepared Long Range Transportation Plans, School Master Plans, Parks Master Plans and Fire Station Location Analyses, all of which provide us with a better understanding of the interaction between impact fee programs, master plans and planning goals. Some of our capabilities include developing unique impact fee programs that align with local governments' land use, economic development and growth management goals.

We are grateful for this opportunity to submit our proposal to Charlotte County for consideration. The following pages dive deeper into our qualifications and relevant experience. Please feel free to reach out with any questions.

Sincerely,

**Elisabeth (Lis) Schuck, AICP, LEED GA**
Vice President - Florida Division Manager
P: 813-825-1278 | E: eschuck@benesch.com

**Nilgün Kamp, AICP**
Project Manager
P: 813-825-1225 | E: nkamp@benesch.com

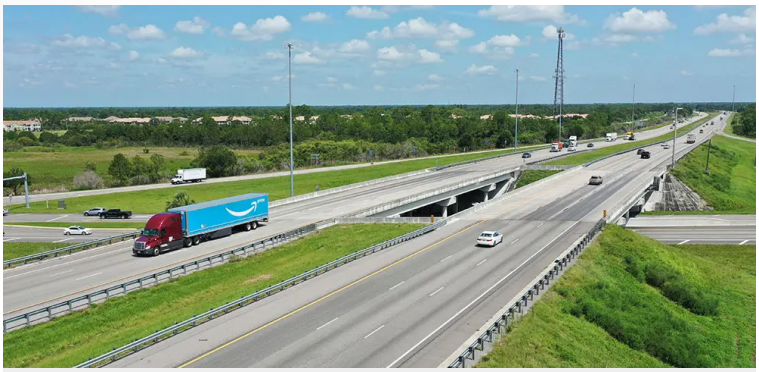
# Team Proposed for this Project

## ABOUT BENESCH

Since 1946, Benesch has successfully completed thousands of projects. Now the future looks even brighter as our nationwide company continues to enhance infrastructure and communities – creating spaces and providing connections in ways that make a difference. In December of 2021, Tindale Oliver merged with Benesch bringing additional infrastructure systems planning capability to our Public Finance team.

Benesch provides industry-leading public finance, planning, multimodal transportation and transit solutions by combining creativity and insight with technical expertise. We deliver quality, innovative finance and infrastructure planning and engineering services that have led to a national reputation for exceptional client service and thoughtful, actionable solutions to issues that government officials face in planning, funding, designing and implementing projects and policies.

Developing and improving communities through technical studies is a specialty of ours—and helping clients develop a common vision and organizational framework is a large part of what we do. Our talented staff are ready to help you develop an impact fee program that aligns with your economic development and growth management goals.



## WHAT WE DO

### Community Development
Public Finance | Civil/Site | Parks & Recreation

### Transportation
Roads | Transit | Aviation | Bridges | Railroads

### Environmental & Water
NEPA | Potable Water | Stormwater | Wastewater

## WHO WE SERVE

Cities & Counties | Federal, State & Local Agencies
Railroads | Transit Authorities | Airports

We routinely tap into our firm's multidisciplinary expertise to support clients across the country. We turn our nationwide capacity and expertise into high-value solutions for local infrastructure challenges.

**ENR #101** TOP 500 DESIGN FIRMS 2025

**1946** Incorporated

**79** Years in Business

**1,200** Number of Employees

Benesch is privately held by employees, with a distributed ownership where no one person owns more than 4%.

# Organization Chart

**Project Principal**

- Elisabeth Schuck, AICP, LEED GA

***1. Project Manager***

- Nilgün Kamp, AICP

***2. Other Key Personnel and 3. Consultants***

**Impact Fee Technical Study - Research Phase**

*Task Leader*

- Nilgün Kamp, AICP

- Robert Layton
- Morgan McLeod, AICP
- Logan Patterson, AICP
- Steve Infanti, AICP

**Meetings & Presentations - Implementation Phase**

*Task Leader*

- Nilgün Kamp, AICP

- Elisabeth Schuck, AICP, LEED GA
- Robert Layton
- Morgan McLeod, AICP

## A. Background of the Personnel

*The Benesch team assembled for this impact fee study has been working together for years, creating both systems and processes that provide streamlined services for our clients. We are proud to bring this level of collaborative expertise, along with many other benefits outlined throughout this proposal.*

# Nilgün Kamp, AICP

Project Manager

Ms. Kamp has been involved in public infrastructure financing for over 32 years. She has served as the project manager for approximately 450+ impact fee, assessment and user fee development and implementation studies for fire, law enforcement, EMS, transportation, libraries, parks and recreational facilities, correctional facilities, government buildings, schools, and solid waste. Her experience also includes demographic and population projections for funding studies, travel behavior analysis, economic and fiscal impact studies, demand analysis and other related funding and planning support activities. Ms. Kamp is regularly invited to present at industry conferences.

### Transportation/Mobility

- City of Miami Springs (2025)
- City of Lakeland (2008, 2014, 2019, 2024)
- Bay County (2024)
- Putnam County (2024)
- City of North Miami Beach (2024)
- Highlands County (2006, 2024)
- Indian River County (2004, 2013, 2019, 2024)
- Collier County (2005, 2008, 2010, 2013, 2018, 2023)
- Hendry County (2023)
- St. Johns County (2023)
- City of Plant City (2023)
- City of Sarasota (2016, 2023)
- Marion County (2014, 2023)
- Sumter County (2008, 2014, 2018, 2023)
- Lake County (2007, 2022)
- Volusia County (2021)
- City of Newberry (2021)
- Palm Beach County (2014, 2021)
- St. Lucie County (2016, 2021)
- City of Orlando (2012, 2021)
- City of Brooksville (2021)
- City of Hollywood (2020)
- Flagler County (2020)
- Manatee County (2020)
- Martin County (2020)
- Hernando County (2013, 2019)
- Hillsborough County (2016, 2019)
- City of Apopka (2019)
- City of Mount Dora (2018)
- City of Tamarac (2018)
- City of Oviedo (2005, 2013, 2018)
- City of Hallandale Beach (2018)
- Orange County (2013, 2017)
- City of Bozeman, MT (2007, 2017)
- City of St. Cloud (2003, 2006, 2016)
- City of Palm Beach Gardens (2016)
- Village of Royal Palm Beach (2016)
- City of Tampa (2007, 2014)
- Brevard County (2014)
- *Charlotte County (2013)*
- Osceola County (2011)
- City of North Port (2011)
- City of Haines City (2009)
- Leon County (2008)
- Panama City (2008)
- City of Helena, MT (2007, 2009)
- Lewis & Clark County, MT (2007, 2009)
- City of Deltona (2006)
- City of Ft. Pierce (2006)
- Polk County (2005, 2009)
- City of Palm Coast (2004)
- City of Kissimmee (2003, 2006)
- Pasco County (2006)

### Parks and Recreation

- City of New Smyrna Beach (2025)
- City of Sarasota (2025)
- Manatee County, FL (2020, 2023, 2025)
- City of North Miami Beach (2024)
- City of Miami Springs (2024)
- City of Coconut Creek (2024)
- Bay County (2024)
- Indian River County (2004, 2013, 2019, 2024)
- Putnam County (2024)
- City of Lakeland (2006, 2009, 2014, 2019, 2024)
- Highlands County (2006, 2024)
- Town of Wake Forest, NC (2017, 2024)
- Collier County (2009, 2013, 2018, 2023)
- Hendry County (2023)
- St. Johns County (2023)
- City of Coconut Creek (2023)

### Education

MA, Economics, University of South Florida

MA, International Relations & Pacific Studies, University of California San Diego

BA, Economics, University of California San Diego

**Years of Experience:** 32

### Registrations and Certifications

American Institute of Certified Planners: 019238

### Professional Affiliations

American Planning Association (APA)

American Institute of Certified Planners (AICP)

Women's Transportation Seminar, Past President, Tampa Bay Chapter

Growth and Infrastructure Consortium, Board of Directors, Treasurer

# Nilgün Kamp, AICP

(cont.)

Project Manager

- City of Plant City (2006, 2023)
- Orange County (2004, 2012, 2017, 2022)
- Volusia County (2008, 2022)
- Palm Beach County (2014, 2021)
- City of Brooksville (2021)
- City of Hollywood (2020)
- Village of Palm Springs (2020)
- Hernando County (2020)
- Lake County (2007, 2020)
- Martin County (2020)
- Flagler County (2020)
- Manatee County (2020)
- City of Mount Dora (2018)
- City of Tamarac (2018)
- City of Hallandale Beach (2018)
- City of Oviedo (2005, 2013, 2018)
- Village of Royal Palm Beach (2017)
- City of Largo (2016)
- *Charlotte County (2014)*
- Brevard County (2014)
- City of Casselberry (2013)
- City of North Port (2011)
- City of Helena, MT (2007, 2009)
- Lewis & Clark County, MT (2007, 2009)
- Panama City (2008)
- City of Kissimmee (2007)
- City of St. Pete Beach (2006, 2007)
- City of Ft. Pierce (2006)
- City of Tavares (2006)
- City of Apopka (2006)
- City of DeBary (2006)
- City of Deltona (2005)

## Fire/EMS

- City of New Smyrna Beach (2025)
- Manatee County, FL (2020, 2023, 2025)
- Bay County (2024)
- City of Bartow (2010, 2015, 2016, 2017, 2018, 2019), 2020, 2021, 2022, 2023, 2024)
- City of Groveland (2022, 2023, 2024)
- Indian River County (2004, 2013, 2019, 2024)
- Highlands County (2006, 2024)
- Lake County (2007, 2011, 2013, 2015, 2016, 2018, 2019, 2020, 2020, 2021, 2022, 2023, 2024)
- City of Lakeland (2006, 2009, 2014, 2019, 2024)
- City of Ocala (2018, 2021, 2022, 2023, 2024)
- Putnam County (2024)
- Collier County (2005, 2010, 2014, 2018, 2024)
- Sumter County (2023, 2024)
- City of Lake City (2008, 2009, 2014, 2015, 2017, 2019, 2023)
- Columbia County (2013, 2017, 2023)
- Hendry County (2023)
- St. Johns County (2023)
- Lee County (2023)
- Immokalee Fire District (2023)
- City of Coconut Creek (2023)
- City of Plant City (2006, 2023)
- Orange County (2005, 2013, 2017, 2022)
- Volusia County (2008, 2022)
- Palm Beach County (2014, 2021)
- City of Brooksville (2021)
- Hardee County (2021)
- Hernando County (2015, 2020)
- Seminole County (2020)
- City of Hollywood (2013, 2020)
- Seminole County (2020)
- City of Hollywood (2013, 2020)
- *Charlotte County (2014, 2020)*
- Martin County (2020)
- Manatee County (2020)
- City of Mount Dora (2019)
- North Collier Fire District (2004, 2015, 2017, 2019)
- City of Lauderdale Lakes (2018)
- City of Oviedo (2005, 2013, 2018)
- City of Hallandale Beach (2018)
- City of Palm Beach Gardens (2016)
- City of Clermont (2015)
- Greater Naples Fire District (2004, 2015)

## Law Enforcement

- City of New Smyrna Beach (2025)
- City of North Miami Beach (2025)
- Highlands County (2006, 2025)
- Manatee County, FL (2020, 2023, 2025)
- Bay County (2024)
- City of Ft. Pierce (2024)
- Indian River County (2004, 2013, 2024)
- Putnam County (2024)
- Hendry County (2023)
- Collier County (2003, 2006, 2010, 2015, 2023)
- St. Johns County (2023)
- City of Plant City (2006, 2023)
- Orange County (2017, 2022)
- Palm Beach County (2014, 2021)
- City of Hollywood (2020)
- Village of Palm Springs (2020)
- Hernando County (2020)
- Flagler County (2020)
- Martin County (2020)
- Manatee County (2020)
- City of Lakeland (2006, 2009, 2014, 2019)
- DeSoto County (2019)
- City of Mount Dora (2018)
- City of Oviedo (2005, 2013, 2018)
- City of Hallandale Beach (2018)
- Orange County (2017)
- City of Palm Beach Gardens (2016)
- *Charlotte County (2014)*
- City of Casselberry (2013)
- City of North Port (2011)
- Panama City (2008)
- City of Helena, MT (2007)
- Lewis & Clark County, MT (2007)
- City of St. Pete Beach (2006, 2007)
- City of Tavares (2006)
- Citrus County (2006)
- City of Fruitland Park (2005)
- City of Deltona (2005)

## Public Libraries

- City of North Miami Beach (2025)
- Highlands County (2006, 2025)
- Manatee County (2020, 2023, 2025)
- City of Lakeland (2014, 2019, 2024)
- Indian River County (2004, 2013, 2024)
- City of Plant City (2023)
- Collier County (2004, 2006, 2010, 2014, 2023)
- Lake County (2007, 2022)
- Palm Beach County (2014, 2021)
- Hernando County (2020)
- Seminole County (2020)
- Martin County (2020)
- Flagler County (2020)
- City of Mount Dora (2018)
- *Charlotte County (2014)*
- Brevard County (2014)

# Nilgün Kamp, AICP

Project Manager

- City of Parkland (2011)
- City of St. Pete Beach (2006, 2007)
- Citrus County (2006)

### Government Buildings

- Putnam County (2024)
- City of Miami Springs (2024)
- Indian River County (2004, 2013, 2024)
- Highlands County (2006, 2024)
- Collier County (2003, 2006, 2010, 2015, 2023)
- St. Johns County (2023)
- Palm Beach County (2014, 2021)
- Town of Pembroke Park (2021)
- City of Brooksville (2021)
- City of Hollywood (2020)
- Martin County (2020)
- Flagler County (2020)
- Hernando County (2020)
- City of Tamarac (2018)
- City of Oviedo (2005, 2013, 2018)
- Village of Royal Palm Beach (2017)
- City of Palm Beach Gardens (2016)
- *Charlotte County (2014)*
- City of Parkland (2011)
- City of North Port (2011)
- Citrus County (2003, 2006)
- City of DeBary (2006)
- City of Ft. Pierce (2006)
- City of Deland (2004)
- City of Deltona (2004)
- City of Inverness (2004)

### Correctional Facilities

- Indian River County (2004, 2013, 2024)
- Bay County (2024)
- Highlands County (2006, 2024)
- Collier County (2009, 2013, 2018, 2023)
- Hendry County (2023)
- Hernando County (2020)
- *Charlotte County (2014)*
- Brevard County (2014)

# Robert Layton

Technical Study - Research Phase

Mr. Layton's primary experience is in public finance studies, including impact fee and assessment studies for fire, law enforcement, EMS, transportation, libraries, parks and recreational facilities, correctional facilities, government buildings, schools, and solid waste. His background in economics enables him to work effectively with economic/demographic trends, capital improvement programs, expenditure and revenue figures and other financial materials. He maintains Benesch's cost and credit databases that serve as quality control measures and has been involved in the preparation of administrative manuals for several jurisdictions.

**Education**
BA, Economics/Business Administration, University of Florida

**Years of Experience:** 17

**Professional Affiliations**
American Planning Association (APA)

## Impact Fee Studies

- City of Miami Springs (2025)
- Bay County (2024)
- City of North Miami (2024)
- City of North Miami Beach (2024)
- Putnam County (2024)
- Hillsborough County (2017, 2020, 2024)
- Indian River County (2013, 2019, 2024)
- Polk County (2024)
- City of Plant City (2023)
- Broward County (2017, 2020, 2023)
- Collier County (2008, 2010, 2013, 2018, 2023)
- Marion County (2014, 2023)
- City of Sarasota (2016, 2023)
- Miami-Dade County (2023)
- Lake County (2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023)
- Hendry County (2023)
- City of Bartow (2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022)
- Orange County (2013, 2017, 2022)
- City of Ocala (2018, 2021, 2022)
- Columbia County (2013, 2017, 2022)
- Volusia County (2018, 2022)
- City of Groveland (2022)
- Hardee County (2021)
- Flagler County (2020)
- Manatee County (2020)
- Martin County (2020)
- Hernando County (2013, 2015, 2019)
- Indian River County (2004, 2013, 2019)
- City of Lauderdale Lakes (2018)
- Sumter County (2008, 2014, 2018)
- City of Lake City (2015, 2017)
- City of Tampa (2009, 2014, 2017)
- City of Lakeland (2013, 2015)
- Brevard County (2014)
- ***Charlotte County (2013, 2014)***
- Osceola County (2011, 2014)
- Sumter County (2008, 2014)
- Charlotte County (2013)
- Indian River County (2013)
- City of Orlando (2012)
- City of North Port (2011)
- City of Haines City (2009)
- City of Helena (MT) (2007, 2009)

# Morgan McLeod, AICP

Technical Study - Research Phase

Ms. McLeod is a planner for the Public Finance team. She is primarily involved with public infrastructure financing and alternative revenue funding studies. Her academic experience in economics enables her to work effectively with demographic variables, capital improvement programs and other financial material. Specifically, her undergraduate and graduate thesis work equips her with the analytical skills necessary to produce accurate population and revenue projections. Additionally, her background in community development enables her to collaborate with municipalities efficiently. Ms. McLeod has served as a planner on multiple projects and previously contributed to several additional projects as an intern with Benesch.

**Education**
MA, Economics, University of South Florida

BA, Economics & International Studies, University of Florida

**Years of Experience:** 6

**Registrations and Certifications**
American Institute of Certified Planners: 35986

***Project Experience***

**Fire/EMS**
- Lee County (2023, 2025)
- St. Johns County (2023)
- Bay County (2024)
- City of Lakeland (2024)
- Putnam County (2024)
- Polk County (2024)
- City of Coconut Creek (2023)
- Immokalee Fire District (2023)
- Hendry County (2023)
- Marion County (2023)
- City of Plant City (2023)
- Collier County (2023)
- City of Coconut Creek (2023)
- Volusia County (2022)
- City of Brooksville (2021)
- Flagler County (2020)
- Hernando County (2020)
- City of Hollywood (2020)
- Martin County (2020)

**Parks and Recreation**
- City of North Miami Beach (2024)
- City of Miami Springs (2024)
- City of Coconut Creek (2024)
- Bay County (2024)
- Putnam County (2024)
- City of Plant City (2023)
- Collier County (2023)
- Volusia County (2022)
- Palm Beach County (2021)
- Hernando County (2020)
- Lake County (2020)
- City of Brooksville (2021)
- Village of Palm Springs (2020)
- Flagler County (2020)

**Law Enforcement**
- Collier County (2023)
- City of Plant City (2023)
- Palm Beach County (2021)
- Martin County (2020)
- Martin County (2020)
- Flagler County (2020)
- Hernando County (2020)
- Village of Palm Springs (2020)

**Schools**
- Hillsborough County Public Schools (2021, 2024)
- Miami-Dade County (2024)
- Broward County (2023)
- Collier County (2023)
- Broward County Public Schools (2023)
- Hendry County (2023)
- Marion County Public Schools (2023)
- Volusia County Schools (2022)
- Palm Beach County (2021)
- Seminole County Public Schools (2021)

**Correctional Facilities**
- Indian River County (2024)
- Putnam County (2024)
- Bay County (2024)
- Hendry County (2023)
- Collier County (2023)
- Martin County (2020)

**Public Libraries**
- Manatee County (2020, 2023, 2025)
- City of Lakeland (2024)
- Bay County (2024)
- Indian River County (2024)
- City of Plant City (2023)
- Collier County (2023)
- Lake County (2022)
- Palm Beach County (2021)
- Flagler County (2020)

**Government Buildings**
- City of Miami Springs (2024)
- Collier County (2023)
- Flagler County (2020)
- City of Brooksville (2021)

**Solid Waste**
- Bay County (2024)
- Indian River County (2024)

**User Fees**
- Orange County (2022)
- Seminole County (2021)

# Logan Patterson, AICP

Technical Study - Research Phase

Mr. Patterson is a planner with significant GIS experience supporting a variety of public finance, transit operations and planning studies, including impact fees, transit development plans, comprehensive operations analyses and microtransit feasibility studies. He is proficient in ESRI GIS software, holds FEMA Emergency Management Certifications: IS-230.D, IS-100.C, IS-120 and has gained surveying knowledge through previous field work.

**Education**
Master of Urban & Regional Planning, University of South Florida

BS, Environmental Science and Policy, Florida State University

**Years of Experience:** 4

**Registrations and Certifications**
American Institute of Certified Planners: 35955

**Impact Fee Studies**

- Seminole County Impact Fee Study (2025)
- Osceola County Impact Fee Study (2025)
- City of Miami Springs Impact Fee Study (2025)
- City of Orlando Transportation Impact Fee Study (2024)
- New Smyrna Beach Transportation Impact Fee Study (2024)
- Hillsborough County School Long Range Plan and Impact Fee Study (2024)
- Polk County Impact Fee Study (2024)
- Putnam County Impact Fee Study (2024)
- Edgewater Impact Fee Study (2024)
- Miami Dade County Impact Fee Study (2024)
- Sumter County Fire Impact Fee Study (2023)
- Immokalee Fire Impact Fee Study (2023)
- Lee County Fire/EMS Impact Fee Study (2023)
- Collier County Parks Impact Fee Study (2023)
- Hendry County Impact Fee Study (2023)
- Marion County Transportation Impact Fee Study (2023)
- St. Johns County Impact Fee Study and Mobility Plan (2023)
- Sarasota Transportation Impact Fee Study (2023)
- Wellness Way MSTU Study (2023)

# Steve Infanti, AICP

Transportation - Research Phase

Mr. Patterson is a planner with extensive experience in travel demand models supporting a variety of public finance, transit operations and planning studies, including impact fees, transit development plans, comprehensive operations analyses and microtransit feasibility studies. He is proficient in ESRI GIS software, holds FEMA Emergency Management Certifications: IS-230.D, IS-100.C, IS-120 and has gained surveying knowledge through previous field work.

**Education**
Graduate Certificate, GIS Applications Specialist, Sault College, ON

BA, Geography, Laurentian University

**Years of Experience:** 22

**Registrations and Certifications**
American Institute of Certified Planners: 022648

**Impact Fee Studies**

- Thompson's Station, TN (2025)
- St Lucie County (2025)
- Hillsborough County (2025)
- Highlands County (2025)
- Manatee County (2025)
- New Smyrna Beach (2024)
- Indian River County (2024)
- City of North Miami Beach (2024)
- City of Lakeland (2006, 2009, 2014, 2019, 2024)
- Bay County (2024)
- Putnam County (2024)
- City of Wake Forest, NC (2024)
- City of Edgewater (2024)
- Polk County (2024)
- Sumter County (2024)
- St. Johns County (2023)
- City of Palm Bay (2023)

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II

# Proposed Management Plan

# Team Organization

## A. Team Organization

### *1. Research Phase*

The team outlined in the previous section are all ready to support this study for Charlotte County. Robert, Logan, Morgan and Steve have all been on Nilgun's team for several years, standing as a testament to their steady teamwork and devotion to their investment in public finance work. With the team's unmatched expertise and longstanding working relationship, Charlotte County can feel confident in the quality and timeliness of the study delivery.

### *2. Implementation Phase*

Nilgun and Liz have worked closely together for over 20 years, fostering a collaborative partnership that leverages Nilgun's decades of expertise and Lis's strengths in project management and stakeholder engagement. Their long-standing professional relationship ensures seamless coordination and efficient project delivery tailored to the specific needs of Charlotte County.

**23** *years of experience*

PROJECT PRINCIPAL

***Elisabeth Schuck, AICP, LEED GA***

With more than 22 years of experience in transit planning and public finance, Lis Schuck brings a depth of expertise and leadership that makes her an outstanding project principal for an impact fee study. As Florida Division Manager for Benesch, Lis is recognized for her strategic approach, technical proficiency and commitment to client success.

**32** *years of experience*

PROJECT MANAGER

***Nilgün Kamp, AICP***

Nilgun Kamp stands out as one of the nation's experts in impact fee studies, with more than 32 years of experience in public infrastructure finance. Her reputation for excellence is reflected in the frequency with which she is invited to present at industry conferences, where she shares best practices and emerging trends with peers and public officials.

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III

# Previous Experience of Team Proposed for this Project

**A. Government Impact Fee Projects:** These projects are designed to ensure that new development pays its fair share for the capital infrastructure needed to support growth. They typically fund essential public facilities such as public buildings, fire/EMS, law enforcement, correctional facilities, parks and libraries, with fees calculated to reflect the proportional demand created by new growth. The process involves a thorough analysis of existing and planned facilities, level of service standards, cost to provide facilities and alternative revenues contributed by new development to ensure that impact fee revenues are used transparently and equitably.

***Benesch has conducted over 450 impact fee studies for these and transportation facilities. In addition, we have prepared parks master plans, fire station location analyses, fire assessments and other planning and funding studies that provide us with a comprehensive understanding of planning and funding of public infrastructure and how these interact with impact fee programs.***

**B. Transportation Impact Fee Projects:** These projects focus on funding improvements to the transportation network necessitated by new development. They may include roadway expansions, intersection upgrades, multimodal enhancements such as sidewalks, bicycle lanes and transit amenities, and are structured to maintain or improve mobility and safety. The fees are based on detailed studies of travel demand, trip generation and infrastructure costs, ensuring that growth-related transportation needs are addressed without placing undue burden on existing residents.

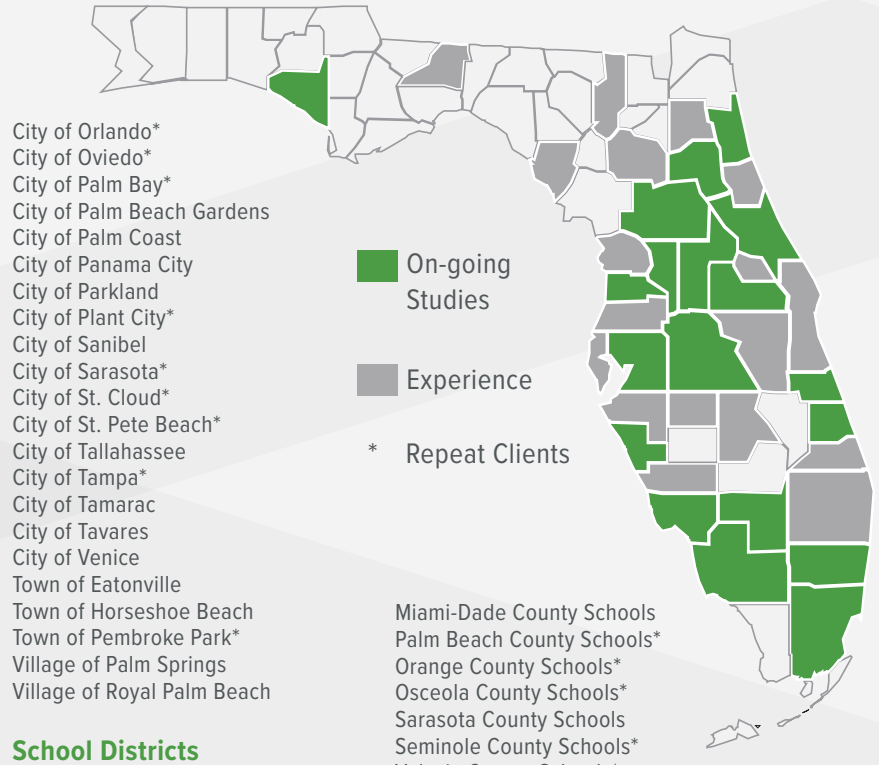
***The Benesch Team includes economists, transportation planners and engineers, travel demand modelers and GIS specialists who truly understand how transportation facilities are built and funded. In addition, we have prepared Long Range Transportation Plans and Transit Development Plans that provide us with a deeper understanding of the interaction between transportation impact fees/mobility fees, transportation concurrency and transportation infrastructure planning. The following exhibit highlights our public finance experience.***

## Counties

Bay County
Brevard County*
Charlotte County*
Citrus County*
Clay County
Collier County*
Columbia County*
DeSoto County
Flagler County*
Hardee County
Hendry County
Highlands County
Hillsborough County*
Hernando County*
Indian River County*
Lake County*
Leon County
Manatee County
Marion County*
Martin County
Miami-Dade County
Orange County*
Osceola County*
Palm Beach County*
Pasco County*
Pinellas County
Polk County*
Putnam County
Sarasota County
Seminole County*
St. Johns County
St. Lucie County*
Sumter County*
Volusia County*

## Cities and Towns

City of Alachua
City of Altamonte Springs
City of Apopka*
City of Bartow*
City of Brooksville
City of Casselberry
City of Clearwater
City of Clermont
City of Coconut Creek
City of Daytona Beach Shores
City of DeBary
City of Deland*
City of Deltona*
City of Edgewater
City of Eustis
City of Fruitland Park
City of Ft. Pierce*
City of Groveland*
City of Haines City
City of Hallandale Beach
City of Hollywood*
City of Inverness*
City of Kissimmee*
City of Lakeland*
City of Lake City*
City of Largo
City of Lauderdale Lakes
City of Miami Springs
City of Mount Dora
City of Newberry
City of North Miami
City of North Miami Beach
City of North Port*
City of Ocala*
City of Orlando*
City of Oviedo*
City of Palm Bay*
City of Palm Beach Gardens
City of Palm Coast
City of Panama City
City of Parkland
City of Plant City*
City of Sanibel
City of Sarasota*
City of St. Cloud*
City of St. Pete Beach*
City of Tallahassee
City of Tampa*
City of Tamarac
City of Tavares
City of Venice
Town of Eatonville
Town of Horseshoe Beach
Town of Pembroke Park*
Village of Palm Springs
Village of Royal Palm Beach




## School Districts

Broward County Schools*
Hernando County Schools*
Hillsborough County Schools*
Lake County Schools*
Marion County Schools
Martin County Schools
Miami-Dade County Schools
Palm Beach County Schools*
Orange County Schools*
Osceola County Schools*
Sarasota County Schools
Seminole County Schools*
Volusia County Schools*

## Fire Districts

North Collier Fire District*
Greater Collier Fire District
Immokalee Fire District

# IV
# Project Control

## A. Schedule

*1. Techniques Planned for Schedule Adherence*

A typical schedule for an impact fee study is designed to ensure timely completion while maintaining open communication with the client and stakeholders. The process generally begins with a thorough review of project details and contract requirements, followed by the development of a preliminary study schedule. This schedule is often adjusted based on client input and project needs. A preliminary schedule for the impact fee study for Charlotte County that complies with the time frame required by Florida statutes is provided in the table on this page.

To keep the study on track, the project team conducts regular internal meetings to monitor progress and address any issues that arise. Communication with client staff is maintained through periodic meetings, virtual check-ins and email updates regarding data needs, study progress and related questions. This approach ensures that all parties remain informed and that the project stays aligned with established milestones.

*2. Individuals Responsible for Schedule Adherence*

With the supervision of both Lis and Nilgün, the entire team proactively manages the schedule, identifying potential delays early and working collaboratively to develop solutions that minimize disruptions. This structured and communicative approach supports the successful and timely completion of the impact fee study.

| Task Description | Date |
|---|---|
| Receipt of Signed Contract | January 9, 2026 |
| Submittal of Data Needs Memorandum | January 16, 2026 |
| Kick-off Meeting (Virtual) | Week of January 26, 2026 |
| Receipt of Requested Data | February 16, 2026 |
| Technical Study | February - November 2026 |
| Submittal of Draft Technical Report | August 28, 2026 |
| Draft Report Review Meeting (Virtual) | Week of September 7, 2026 |
| Public Workshops | September/October 2026 |
| Submittal of Final Technical Report | Two weeks after receipt of all comments |
| Adoption Hearing | November 2026 |

## B. Recent, Current and Projected Workload

| TEAM MEMBER | Location | Percent of Time Available |
|---|---|---|
| Nilgün Kamp | Tampa, FL | 20% |
| Lis Schuck | Tampa, FL | 5% |
| Robert Layton | Tampa, FL | 25% |
| Logan Patterson | Tampa, FL | 15% |
| Morgan McLeod | Tampa, FL | 35% |
| Steve Infanti | Tampa, FL | 25% |

Benesch brings you a team that is ready and available to serve Charlotte County to successfully complete the Impact Fee Study. We were very intentional in selecting the staff we have assigned to this project. Each team member's workload capacity will allow them to contribute to this project promptly and thoroughly.

### CURRENT & PROJECTED WORKLOAD

Our Public Finance Team is working on several studies that are in different phases. While some are in the implementation stages, others are in the data collection or technical analysis stages. Over the next few months, we expect several projects to be completed, freeing our staff to undertake additional projects. With a dedicated Public Finance Group and other staff with experience in public finance studies, we are confident we will be able to meet Charlotte County's targeted time frame while still providing a high-quality product, as evidenced during our prior studies for surrounding counties. The estimated percent availability of each team member is indicated above.

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# V

# Proposed Design Approach for this Project

## UNDERSTANDING

Located on the Gulf Coast of Florida, Charlotte County has a population of over 210,000 and is experiencing unprecedented growth. According to the Charlotte Interactive Growth Model (CIGM) developed by Metro Forecasting Models (MFM) and last updated in August 2024, the County population grew by 11 percent between June 2023 and February 2025 and is forecasted to exceed 250,000 people over the next five years. As shown in Figure 1, while historically Charlotte County's growth rate has been at or below the statewide average, the growth rate started to exceed the state average as of 2016. Since then, the difference between the countywide and statewide growth has become more significant each year. These growth levels are also evident in the residential permitting levels, as shown in Figure 2. Between 2021 and 2024, the County permitted an average of 4,900 homes per year. Permitting levels during these four years are some of the highest since the 1990s. This high level of growth places a burden on public infrastructure and services.

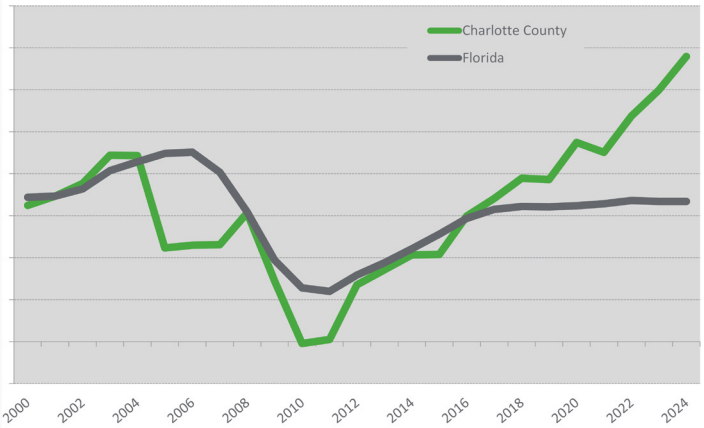
In terms of taxable values per capita, like many other Florida communities, Charlotte County experienced a strong increase between 2000 and 2007, followed by a decline until 2013, as shown in Figure 3. Since then, the County's tax base has recovered and experienced an average increase of almost 15 percent per year since 2021. Although Charlotte County was developed primarily for residential purposes with over 85 percent of its tax base value coming from residential properties, the County recognizes the influx of new residents will increase demand for new commercial and industrial development. As the County grows, the tax base has the potential to become more balanced, and the County will be in a better position to handle economic fluctuations that affect the ad valorem tax revenues.

Given the fluctuations in property tax revenues and high growth levels, Charlotte County implemented impact fees in the late 1980s for several service areas. The technical study that is the basis of the current fees was last updated in 2021. At this time, the County is interested in updating the impact fee calculations to reflect the most recent data for the following service areas:

- **Transportation**
- **Parks and recreation**
- **Library facilities**
- **Emergency medical services**
- **Fire rescue**
- **Law enforcement**
- **Correctional Facilities**
- **Public Buildings**

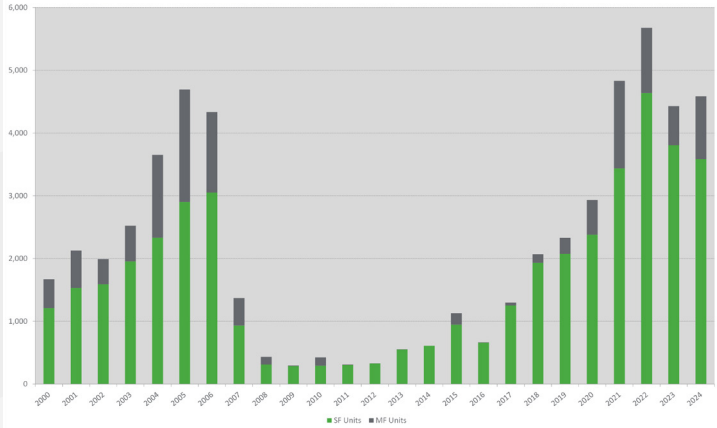
In addition, the County is interested in an optional task that would update the school impact fee if desired by the Charlotte County School Board.

**Figure 1 – Population Trends (3-Year Average)**



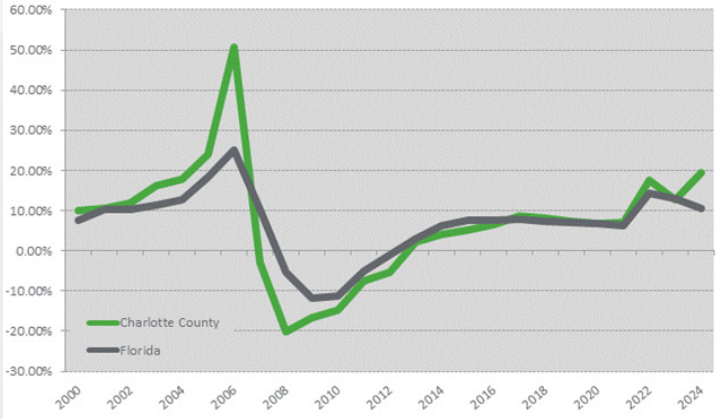

Source: Bureau of Economic & Business Research (BEBR)

**Figure 2 – Charlotte County Residential Permitting**




Source: U.S. Census Building Permits

**Figure 3 – Trends in Taxable Values per Capita**




Source: Florida Property Valuations and Tax Databook

### A. Describe Proposed Philosophy / B. Problem Solving Techniques

The Benesch Team includes planners, engineers, economists and GIS specialists with in-depth experience in impact fee studies for a wide range of program areas, including those requested by Charlotte County. The Benesch team completed 2013 and 2014 impact fee studies for Charlotte County as well as several impact fee studies for neighboring counties including Collier County, Manatee County and Lee County. Through this work, we have a strong understanding of local conditions, which brings efficiencies to the impact fee study for Charlotte County.

The Benesch Team have also prepared Long Range Transportation Plans, School Master Plans, Parks Master Plans, Fire Station Location analyses and other planning documents as well as assisting local governments with transportation concurrency, administrative manuals and other related work, and understands the relationship between impact fees, master plans and economic development and growth management goals.

This scope of services to prepare the impact fee study for Charlotte County is organized into four major tasks that include the initial background review and methodology evaluation, technical analysis to calculate the fees, a technical report and meetings and presentations. The work plan for each of the four major tasks is presented in the remainder of this section.

## TASK 1: BACKGROUND AND METHODOLOGY REVIEW

Upon receipt of the Notice to Proceed, Benesch will coordinate with the County for the collection of the specific studies, data, current policies and procedures and other related information necessary to complete the study.

Benesch will review the background information and facilitate a kick-off meeting with key County staff to discuss major technical, legal and policy issues; coordinate staff/Benesch responsibilities; and refine the project schedule as necessary. Some of the topics that will be discussed include:

- *Recent changes in legal requirements related to the implementation of impact fees*
- *Role of impact fees in Charlotte County*
- *Impact fee methodologies used throughout Florida*
- *Population trends/projections*
- *Cost trends*
- *Available funding for capacity projects*
- *Adopted level of service standards*
- *Future needs/projects*
- *Any administrative or implementation related issues/concerns*

## TASK 2: TECHNICAL ANALYSIS

This task addresses the update of the impact fees, which will reflect the capital costs of providing related infrastructure in Charlotte County. This work effort includes the review of population trends, level of service analysis, update of the demand component, a review of the design, construction, land/right-of-way (ROW) and other related costs and credit calculations due to other funding allocated to capacity projects.

The methodology used in the study will comply with the requirements of court cases of the State of Florida and State statutes.

### *Subtask 2.1 - Future Growth Projections and Level of Service (LOS) Analysis*

Benesch will work with the County staff and document the County's historical population growth patterns and projections for future growth using data available from the U.S. Census, University of Florida Bureau of Economic and Business Research (BEBR), and the County's Planning & Zoning Division. A review of recent permitting trends by land use will be completed as data is available.

As part of this task, Benesch will calculate achieved level of service for each service area and compare these to the adopted level of service standards as applicable. This analysis will determine the level of service that will be used in the impact fee calculations.

### *Subtask 2.2 - Inventory of Existing and Planned Facilities*

The County will provide information on the inventory of the existing capital facilities owned by the County. Planned facilities will be documented based on the information in the Capital Improvement Program (CIP), Capital Improvements Element (CIE) and other documents collected as part of the Task 1 effort, as well as discussions with County staff. In addition to the CIP, any long range and/or master plans the County has prepared for the impact fee service areas, such as the Parks and Recreation Master Plan, will be reviewed.

The parks and recreation facility inventories will include park land and recreational facilities. The library facility inventory will

include the library buildings, related land, and library materials. The public buildings inventory will include general government buildings and related land. Fire rescue, EMS, law enforcement and correctional facilities will include stations/buildings, land, vehicles and equipment. Transportation facility inventory will include roadways that are classified as collectors and above. A summary of the capital asset inventory, as well as planned facilities for each program area, will be developed.

### *Subtask 2.3 – Demand Component*

Parks and library impact fees are typically charged only to residential land uses, and the demand is measured in terms of persons per housing unit. The latest data available for Charlotte County from American Community Survey (ACS) will be used for this component.

Benesch typically uses functional population per unit of land use for public buildings, fire rescue, EMS, law enforcement and correctional facilities, which is also Charlotte County's adopted methodology. Functional population measures the benefit to each land use based on the presence of people at that land use throughout the day. In other words, land uses are charged for the availability of these services based on full-time equivalent persons present at each land use throughout the day.

The demand component of the transportation impact fees is measured in terms of vehicle miles of travel (VMT). Benesch has an extensive database that includes trip characteristics studies completed in Florida for more than 40 land uses, which measure trip generation rate, trip length and capture trips for each land use. The database includes studies completed in Charlotte County along with other Florida jurisdictions. This data has been used in previous transportation impact fee studies throughout Florida both by Benesch and other consultants, including in Charlotte County's most recent study. Availability of this data enables our clients to meet the State requirements related to using localized data, as opposed to relying solely on national data.

In addition to the Florida studies database, the demand component will be updated based on secondary data sources, such as trip length information from the travel demand model, the latest ITE Trip Generation Handbook and any other available data.

As part of this task, land use categories included in the County's impact fee schedule will be reviewed. Based on input from the County, Benesch will incorporate land uses that are frequently being permitted into impact fee schedule and make any clarifications as needed.

### *Subtask 2.4 – Cost Component*

The cost component for the impact fee will be developed to reflect the current cost of adding capacity in Charlotte County. Cost elements reviewed will include design, architectural and engineering inspection, construction, land/right-of-way (ROW), vehicles/equipment and other related costs. We will review recent bids, recently completed local projects (within the past five years), recent land/ROW purchases or appraisals and other relevant documents to identify service facility improvement costs that may be considered in the calculation of the cost component of the impact fee formula for the County. This information will be compared to and/or supplemented with Benesch's cost databases that include information from other Florida jurisdictions. The analysis will be documented in the technical report.

### *Subtask 2.5 – Credit Component*

Benesch will review historical and projected capital improvement funding sources and expenditures for land/ROW, construction, design, and engineering inspection and other related costs in Charlotte County. Funding sources will include all non-impact fee funding, such as ad valorem taxes, sales tax, grants, assessments, user fees, among others.


Since 1994, one of the important revenue sources for capital facilities in Charlotte County has been the one-cent local option sales tax. This tax has been renewed continuously since then, and the voters will decide in 2026 again whether to extend the local option sales tax for an additional six years. The list of potential projects that would be funded with future sales tax revenues includes several projects related to growth such as the widening of Taylor Road, four new Fire/EMS stations, a new public library in Babcock Ranch, a new warehouse for the Sheriff's office, and an addition to the Mid-County Annex. Capacity expansion projects funded with the sales tax would be incorporated into the credit calculations against the impact fee cost to ensure that new development is not being overcharged.

Debt service (both existing and anticipated over the period of the adopted Capital Improvement Program) will also be reviewed to determine the amount creditable for capital expansion projects. Based on this information, the credit component of the impact fee equation will be developed. In addition to the local option sales tax, this review will include any applicable funding sources used for capital expansion projects in Charlotte County, such as General Fund/ad valorem tax, fuel tax, grants, etc. as appropriate.

### *Subtask 2.6 – Fee Schedules and Comparison*

Based on the results of Tasks 1 and 2, a fee schedule for each service area will be developed. The calculated fees will be compared to those adopted by nearby or similar jurisdictions. The comparison will present adopted fee rates, date of the most recent technical study and adoption percentage, as information is available.

### *Subtask 2.7 – Annual Adjustment*

As requested in the County's RFP, a methodology to update the County's impact fees through annual indexing will be included in the technical report. Indexing calculations will rely on land value changes obtained from the Charlotte County Property Appraiser, building cost changes from the Engineering News Record (ENR), and equipment/ vehicle cost changes from the Consumer Price Index (CPI). Given that F.S. 163.31801 includes limiting language on fee increases, viability of this task will be discussed with the County during the kick-off meeting.

## TASK 3: TECHNICAL REPORT

### *Subtask 3.1 – Draft Technical Report*

A draft technical report documenting the results of Tasks 1 and 2 will be prepared and submitted for review by the County staff. The technical report will include all information, estimates, projections, and data analysis, as well as any assumptions made, and methodologies employed to complete these tasks. Additionally, the draft technical report will include an analysis of the economic impact of any increase in impact fees in terms of projects that can be built with additional revenues based on project lists provided by the County.

A meeting will be held with the County staff and administration to present draft report findings, respond to questions and prepare for public meetings. If necessary, a revised draft report will be prepared and submitted.

### *Subtask 3.2 – Final Technical Report*

Upon receipt of comments from the County, Benesch will make the necessary revisions to the draft report and prepare the final report, which will incorporate input from the County, Board of County Commissioners and other community groups and stakeholders as appropriate.

## TASK 4: MEETINGS AND PRESENTATIONS

As part of this study, the following five meetings and presentations are envisioned to be conducted:



- *Kickoff meeting (virtual)*
- *One interim meeting with the County staff to review preliminary findings (virtual)*
- *One meeting with County staff and administration to review draft report findings and prepare for public meetings (virtual)*
- *One workshop with the Board of County Commissioners to present study results and obtain input*
- *Adoption hearing*

For all presentations, Benesch will prepare user-friendly, easy-to-follow materials in PowerPoint and provide drafts to County staff for review prior to each meeting/presentation. In addition to these formal meetings, Benesch will be in close contact with the County's Project Manager to ensure that the County is aware of the study's progress. With offices in Tampa, Benesch is easily accessible to Charlotte County.

## OPTIONAL TASK: SCHOOL IMPACT FEE

As part of this task, Benesch will coordinate with Charlotte County Public Schools for the collection of the specific studies, data, previous technical reports, current policies and procedures and other related information necessary to complete the study. Benesch will facilitate a kick-off meeting with key District staff to discuss major technical, legal and policy issues, coordinate staff/Benesch responsibility and redefine the project schedule as necessary.

The technical analysis for the school impact fee will include the documentation of the following components:

- *Historical and projected enrollment trends*
- *School facilities inventory and facility service delivery*
- *Cost analysis to estimate the average cost of building a new school in Charlotte County*
- *Historical and projected funding sources for capital expansion projects to account for future development's contribution to capacity projects through non-impact fee revenue sources*
- *Development of student generation rate based on student address data provided by Charlotte County Public Schools along with property data from the Charlotte County Property Appraiser using a GIS-based approach*
- *Updated school impact fee schedule*

This analysis will be documented in the draft technical report. The draft report also will include a comparison of school impact fees in other Florida counties.

Upon receipt of the comments from the School District and the County, a final report will be prepared.

As part of this scope, several meetings will be conducted with the School District and County staff, School Board and the Board of County Commissioners to present the study results and respond to questions.

If requested, a more detailed scope of service along with a budget will be prepared for this task.

## ANTICIPATED PROBLEMS & PROPOSED SOLUTIONS

*1. Study Schedule:* F.S. 163.31801 (Impact Fee Act) requires that impact fees studies be completed and adopted within one year from start if the fees are increasing. When multiple fees are being updated concurrently, we typically see data collection process requiring several months, which reduces time available for the technical analysis, public involvement and the adoption process. To overcome this issue, we offer to submit a data needs memorandum upon selection while waiting for contract review and approval process. This provides County departments with more time to collect the data and allows the technical analysis to start more quickly upon receipt of notice to proceed.

*2. Limited Local Data:* In cases where there are not very many projects built for a given infrastructure, it may be difficult to develop cost estimates. Benesch has a database for each infrastructure type that includes projects built by other Florida jurisdictions, which is then used both as supplemental data and a quality control process.

*3. Legislative Changes:* There have been multiple changes to the Impact Fee Act over the past several years. In some cases, these changes affected how the fees are calculated and implemented. Benesch tracks all proposed legislation related to impact fees and provides guidance to its clients during the study process and afterwards as needed.

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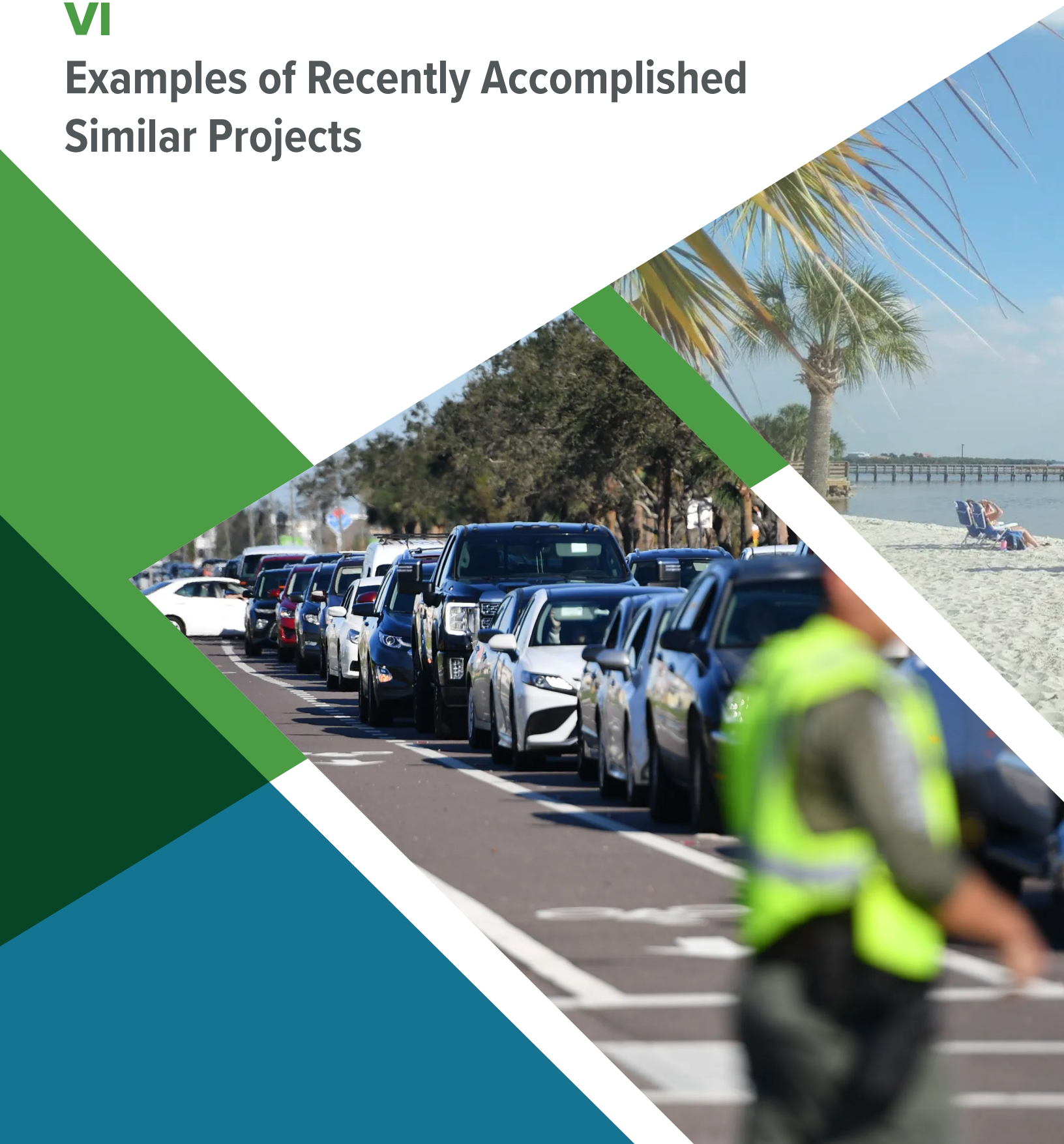
# VI

# Examples of Recently Accomplished Similar Projects



## A. Describe the Projects to Demonstrate:

*1. Schedule Control*
Benesch consistently delivers projects on schedule by developing detailed, realistic timelines tailored to each client's needs. The team provides Charlotte County with a well-structured schedule at project kickoff, ensuring all milestones and deliverables are clearly defined and achievable. By maintaining open communication and proactive project management, Benesch prioritizes staying on target with every commitment, supporting client goals and minimizing delays.

*2. Implementation Procedures*
Benesch's implementation procedures are proven and have been refined through hundreds of successful projects, ensuring reliable and effective results for clients. Nilgün Kamp, a recognized expert in public infrastructure financing, leads the team with decades of experience and is supported by highly skilled professionals who excel in the research phase. This collaborative approach allows the implementation phase to be streamlined and efficient, providing Charlotte County with a well-executed process.

*3. Cost Control*
Benesch makes cost control a top priority by developing detailed scopes and budgets for every project. Through proactive communication, real-time budget tracking and a commitment to meeting both schedule and budget parameters, Benesch consistently delivers projects within budget for local governments.

***The project examples we've included on the following pages all exemplify schedule control and cost control, as well as outline the implementation procedures that ultimately led to a successful project outcome.***

# Impact Fee Studies

## Collier County, FL

**Background:** Collier County has had significant population growth for many decades, during which land values and construction costs increased rapidly. Benesch has been contracted by Collier County repeatedly since 1992 to develop or update impact fees in nine program areas and currently is updating several of the County's impact fees once again.

### Knowledge

- Localized indexing methods developed by Benesch used for several years to reflect annual changes in costs in Collier County.
- Administrative manual preparation and updating used to assist County staff in management of comprehensive impact fee program.
- Since 2000, Collier County averaged annual population growth of 2.2% and is projected to grow at approximately 1.4% annually through 2040.

### Insights

- High growth rates required additional infrastructure.
- Significant increase in land values and construction costs normal for the County during periods of high growth.
- Concerns about high impact fees from development community needed to be continuously addressed during fee update process.
- Collier County has one of highest income-per-person metrics and one of the most productive tax bases in Florida.

### Outcomes

- Prepared studies that reflect accurate cost estimates and presented findings with a high level of "transparency" to successfully gain public support.
- County has raised and used almost $1 billion in impact fees to build high-quality infrastructure.
- County has proven to be a developing community in which growth pays for growth and creates a quality community experience.

### Key Issues

- High growth rates that led to significant increase in land values
- Concerns of potential high impact fees

### Dates of Service

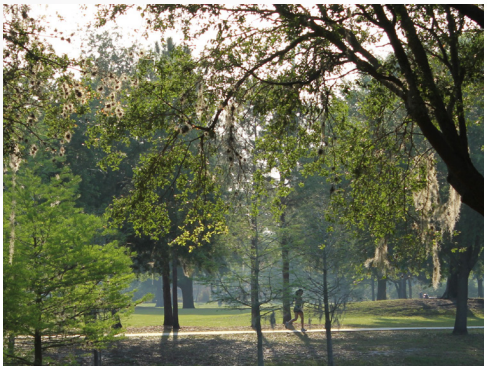
1992 - 2025 (multiple studies)

### Schedule/Cost Control

Study was on time and within budget

### Client Contact

Gino Santabarbara, PMP
Deputy County Manager
Collier County Government
2800 North Horseshoe Dr.
Naples, FL 33942
P: 239-252-2925
E: Gino.Santabarbara@CollierCountyFL.gov



# Impact Fee Studies

## Orange County, FL

**Key Issues**
- High growth county
- Increasing cost levels
- Continuous need to add infrastructure

**Dates of Service**
2004 - 2022 (multiple studies)
05/2022 - 01/2023 (most recent study)

**Schedule/Cost Control**
Study was on time and within budget

**Client Reference**
Alan Marshall
Orange County
400 E South Street
Orlando, FL 32801
P: 321-370-9852
E: alan.marshall@ocfl.net

**Background:** Orange County has historically implemented impact fees to address the infrastructure costs associated with new growth. In 2004, to address cost and land value increases, the County retained Benesch to update several fee areas, including fire rescue and schools and develop a new parks and recreation facilities impact fee program. In 2011, the County retained Benesch to update its transportation and parks impact fees. In 2016, Benesch was retained again to update the parks, fire rescue and law enforcement impact fees; in 2017, to update the transportation impact fee, and in 2018, the school impact fee once again. In 2022, Benesch completed the update of the County's fire rescue, law enforcement and parks impact fees and is currently updating the school impact fee. In addition, Benesch provided services related to review of alternative impact fee studies.

**Knowledge**
- High growth county, ranking 2nd out of 67 Florida counties in terms of absolute growth that will be added by 2045, and 7th in terms annual population growth rate.
- 2nd highest in terms of sales tax per capita due to high level of tourism activity.
- High level of seasonal residents/visitors impacting service levels.

**Insights**
- Develop demand component based on fire alarms/emergency calls received as well as functional population as potential options to the County.
- Recommendations on how to treat the County's large inventory of undeveloped habitat land in the parks and recreation impact fee analysis.
- Develop a multimodal transportation impact fee for the County's Alternative Mobility Area (AMA) and a roadway-based fee for the rest of the unincorporated county.
- Developed transportation impact fees using three different methodologies: consumption-based, improvements-based, and asset value based.
- Introduced fee variations among rural, suburban, and urban areas for the transportation impact fee.

**Outcomes**
- Developed impact/multimodal fee structures that supported the County's growth management and infrastructure funding goals.
- Successfully completed multiple meetings with stakeholders, elected officials, and the public.
- All studies were successfully adopted.

# Impact Fee & Fire Assessment Studies

## Hernando County, FL

**Background:** Hernando County and Hernando County MPO retained Benesch (formerly Tindale Oliver) to update the County's transportation impact fee first in 2007 and again in 2012 and 2019. In 2020, Benesch was retained to update of fire, EMS, law enforcement, correctional facilities, government buildings, parks and library impact fees. In addition, Hernando County retained Benesch to prepare a fire assessment and EMS MSTU study in 2015.

Benesch has provided Hernando County with planning and finance services since the early 1990s, resulting in complete knowledge of the County's history and planning goals.

**Knowledge**

- Most recent update study included review of other potential revenue sources that could be used to fund capital expenditures.
- Developed list of critical projects and prepared revenue projections for all service areas to assist the elected officials in determining adoption percentages.

**Insights**

- Interest in impact fee programs that are responsive to economic development and growth management goals.
- Need to use multiple dedicated revenue sources to fund capital and operational needs of the Fire Department.

**Outcomes**

- Developed affordable growth model, which provided a variation in fee levels based on growth rates. County was able to reduce its rates during slow growth periods.
- Evaluated revenue options and prepared revenue estimates to help fund capital needs.
- Updated all variables to reflect the most recent and localized data, consistent with the legal requirements.

**Key Issues**

- Multiple revenue sources needed to fund Fire Department
- Need for several impact fees to be updated
- Reduced rates were implemented

**Dates of Service**

04/2007 - 04/2022 (multiple studies)

**Schedule/Cost Control**

Study was on time and within budget

**Client Reference**

Jeffrey Rogers, PE
Hernando County Planning
1653 Blaise Drive
Brooksville, FL 34601
P: 352-754-4841
E: jrogers@hernandocounty.us

# Impact Fee Study

## St. Johns County, FL

**Background:** St. Johns County is a high growth county, ranking 2nd out of 67 Florida counties in terms of projected growth rate. Since the pandemic, the County has been experiencing highest residential permitting levels since at least 1990s. The County implemented impact fees for public buildings, law enforcement, correctional facilities, fire rescue, parks and recreation, and roads. St. Johns County retained Benesch in 2023 to update the existing fees, develop a conservation impact fee, and evaluate whether the roadway impact fee should be converted to a mobility fee. In addition, the study was to prepare a mobility plan, review the County's concurrency processes and review proportionate share calculations.

**Knowledge**

- Recent changes to the impact/mobility fee legislation.
- Concurrency regulations and proportionate share calculations.
- Impact of outstanding impact fee credits on the County's ability to fund transportation improvements.

**Insights**

- Need to maintain the concurrency in place while converting roadway-based transportation impact fee to a multi-modal transportation impact fee.
- Cost elements affecting the County's ability to build infrastructure for all service areas.
- Measurement of the demand component to develop an equitable fee structure.

**Outcomes**

- Provided recommendations related to mobility fee.
- Used multiple data sources to develop the demand component.
- Quantified full cost of growth in terms of capital facilities.
- Presented study results to the Board of County Commissioners and obtained approval of the study.

**Key Issues**

- High growth county
- Significant level of impact fee credits affecting revenue levels
- Need to reflect current costs

**Dates of Service**

06/2023 - 10/2025

**Schedule/Cost Control**

Study was on time and within budget

**Client Reference**

Michael Roberson
Director, Growth Management Department
St. Johns County Board of County Commissioners
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# Impact Fee Study

## Bay County, FL

**Background:** Located in northwest Florida, Bay County has been a moderate growth county. The County has implemented impact fees for transportation, fire rescue, libraries, and parks facilities. In 2013, transportation impact fees were suspended, and the other fees were discounted by 50 percent. Given the recent permitting activity and to comply with legal requirements, the County retained Benesch in 2024 to update the existing fees, develop law enforcement, correctional facilities, solid waste and EMS impact fees. In addition, the study scope included a transportation needs analysis and the update of the Capital Improvements Element.

### Knowledge

- Use of travel demand models to estimate future transportation needs.
- Legal requirements associated with impact fees for multiple service areas and options available to the County in terms of implementation of updated or newly developed fees.
- Sound technical methodology that calculates the cost of growth.

### Insights

- Moderate growth levels and availability of the local options infrastructure sales tax provide the County with flexibility in terms of impact fee revenue needs in funding capital facilities.
- Incorporating non-impact fee revenues to ensure new development is not overcharged.
- Reflecting recent cost increases.

### Outcomes

- Developed a set of transportation projects for incorporation to the Capital Improvement Element.
- Updated/developed technical studies for each service area.
- Developed benefit districts for transportation and parks impact fees to satisfy legal requirements.
- Presented study results to the County Commissioners and received positive feedback.
- The study is in the final implementation process.

### Key Issues

- Outdated impact fees
- Need to update the Capital Improvements Element
- Need to develop benefit districts

### Dates of Service

03/2024 - 12/2025

### Schedule/Cost Control

Study was on time and within budget

### Client Reference

Ian Crelling
Community Development Director
Planning & Zoning Division
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Panama City, FL 32401
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E: icrelling@baycountyfl.gov

benesch

# VII
# Experience and Capabilities

## WHY WE'RE A GREAT FIT FOR CHARLOTTE COUNTY


*Benesch is a leader in providing innovative public finance, planning and engineering services to its government clients. All personnel needed for this project are Benesch employees, including professional engineers, certified planners, LEED and GIS professionals, as well as numerous planners, economists and GIS analysts. We will be available to meet with the County and/or attend public meetings/ presentations in-person as needed, but will also leverage virtual technologies to conserve project resources where appropriate.*

### A., B., and C. - Government, Transportation and School Board Impact Fee Methodology

The following paragraphs provide a summary of the Benesch team's unique qualifications, experience and innovative methodology for government, transportation and school impact fees.

#### *Impact Fee Methodology*

Benesch's Public Finance and Infrastructure Planning Team specializes in impact/mobility fee studies, assessments, user fees and alternative funding studies, as well as concurrency processes and systems. We have earned a national reputation as a leader in impact fee studies and, more importantly, in their acceptance and implementation.

Benesch is familiar with various methods used to prepare impact fees and knows how to apply methods correctly to ensure that new development is not overcharged and that the fees are legally defensible.

Our public finance team has published articles on impact fees that document the correct methodology and approach to conducting trip characteristic studies and developing impact fee programs. These articles set the standard for impact fee studies and have been used by many agencies across the nation to develop impact fee programs, including work by other consultants.

#### *Fire/EMS Impact Fee Methodologies*

Benesch staff members are very knowledgeable about different methodologies used to calculate fire/EMS impact fees, and have used fire flow, call-based and functional population-based approaches in our impact fee work. Benesch routinely works with incident data through its impact fee and fire assessment fee studies, and is highly familiar with the National Fire Incident Reporting System (NFIRS) as well as the National Fire Protection Association (NFPA) standards, ISO requirements and ratings that tend to influence decisions on timing and location of capital assets.

#### *Economic Growth Impact/Mobility Fee Methodology*

We presented a paper entitled "Smart Growth and Impact Fees" at the Reconciling Impact Fees Symposium in Atlanta. In that paper, Benesch developed a methodology that allows impact fees to be sensitive to the growth rate of various areas within a city or a county. Benesch has directly tied the rate of growth in the impact fee equation and is now using this concept in our current impact fee studies.

### *Trip Characteristics Studies*

Benesch has extensive experience in conducting trip characteristics studies and published articles on the correct methodology to prepare the studies. We were also part of multiple ITE Committees that addressed components of the transportation demand. This understanding is critical in developing an accurate demand component for road impact fees. This data is also used in the development of functional population, demand component for some of the other fee.

### *Diverse Capabilities*

The Benesch Team includes planners, engineers, economists and GIS specialists with in-depth experience in impact fee studies. Availability of these capabilities within the same firm allows us to provide extensive analyses needed to fulfill legal requirements associated with impact fees, such as detailed travel demand analysis, cost analysis by subareas and analyses related to other impact fee components.

### *Student Generation Analysis*

The diverse make-up of our firm allows Benesch staff to develop innovative methods and approaches to completing projects. For example, we are one of the few consultants in Florida to successfully calculate student generation rates (SGR) using Geographic Information Systems (GIS) by spatially tying student addresses to parcel data. This analysis provides the number of students per household, by type and size of dwelling unit, based on the most current data available. Benesch supplements this analysis with temporal analysis to better reflect generation rates over the life of a structure and moderate temporary fluctuations in student generation rates. In addition, Benesch documents the differential in student generation rates of all homes versus the new homes.

### *Comprehensive Planning & Land Development Code Experience*

Benesch's planning experience includes development and updates of Comprehensive Plans and Land Development Codes. Our staff assisted multiple communities with these services and this experience will be highly beneficial in Pike County's Impact Fee Study.

### *Comparative Databases*

Benesch has compiled cost databases that include unit costs for several types of infrastructure. These databases supplement local information, which tends to have a small sample size and serves as a quality-control mechanism to determine whether the local costs are out of the range of what other jurisdictions experience. Similarly, our revenue credit database compares non-impact fee funding levels between jurisdictions and serves as a quality-control tool to ensure that the data used for impact fee calculations are accurate.

### *Public Presentations*

***Benesch has prepared and made over 850 impact fee presentations that are easy to follow during the last 32 years.*** We also have worked very closely with evaluation and review committees and have been successful in building consensus among people with different opinions on a variety of impact-fee-related topics.

### *Nationally Recognized*

Nilgün Kamp is a member of the Growth and Infrastructure Consortium (GIC) (formerly National Impact Fee Roundtable), serving on the Board of Directors. Nilgün routinely makes presentations and moderate sessions at annual GIC meetings and other industry events.

### *Publications*

Benesch team members have published articles related to public finance issues in professional journals and manuals documenting the correct methodology and approach, setting the standard in their areas and being used by agencies across the US.

### *Infrastructure Planning/Master Plans*

Benesch has prepared Transportation/Mobility, Transit, School, Fire, Parks and Utility Master Plans for local governments, and therefore, understands the relation between impact fees, master plans, and economic development and growth management goals.

## References

Below is a concise list of references for your easy access.

**Gino Santabarbara, PMP**
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***Project: Collier county - Impact Fee Studies***

**Alan Marshall**
Orange County
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***Project: Orange County - Parks & Transportation Impact Fee Studies***

**Jeffrey Rogers, PE**
Hernando County Planning
1653 Blaise Drive
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***Project: Hernando County - Impact Fee & Fire Assessment Studies***

**Michael Roberson**
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***Project: St. Johns County - Impact Fee Study***

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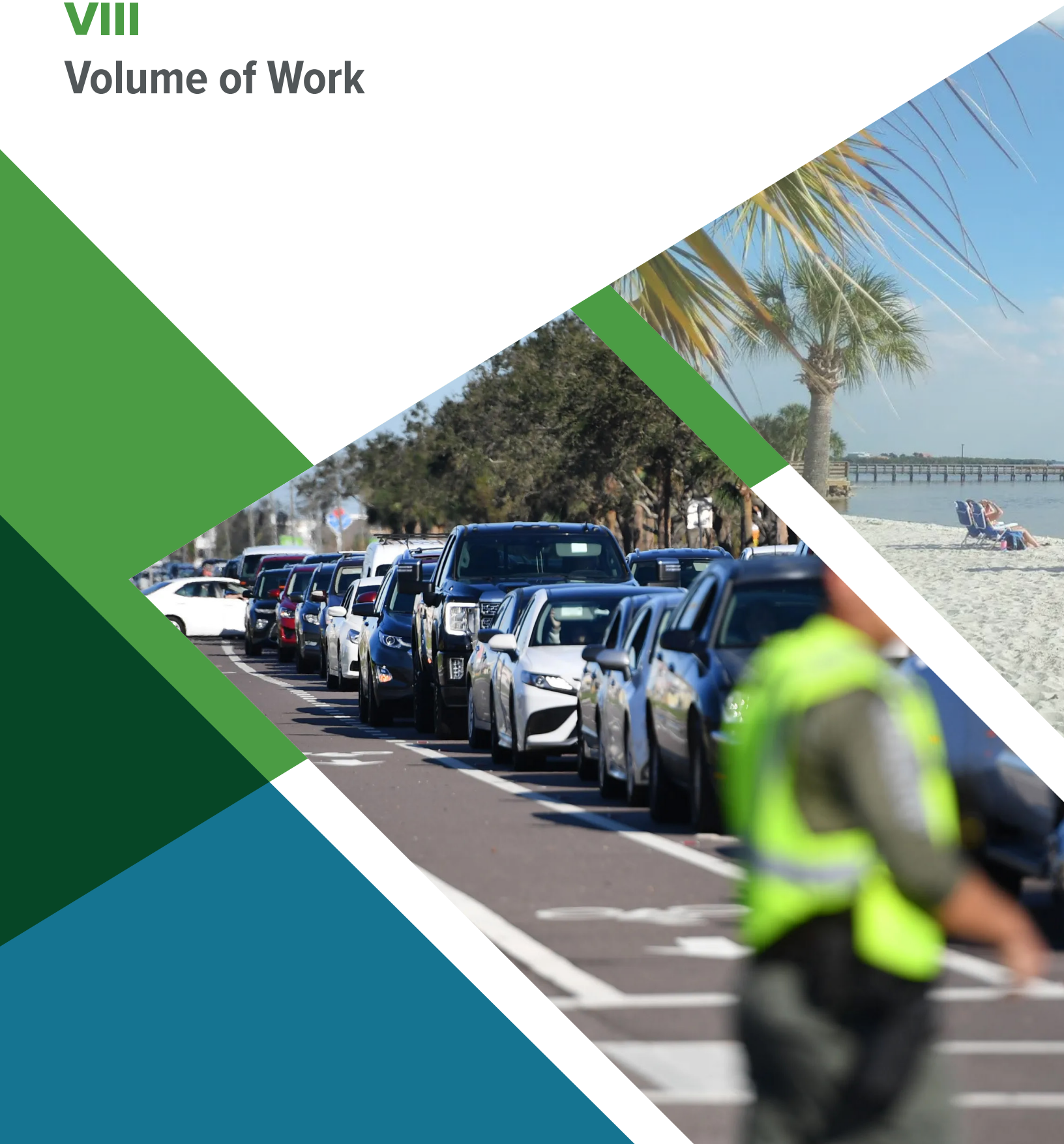
***Project: Bay County - Impact Fee Study***

# VIII
# Volume of Work



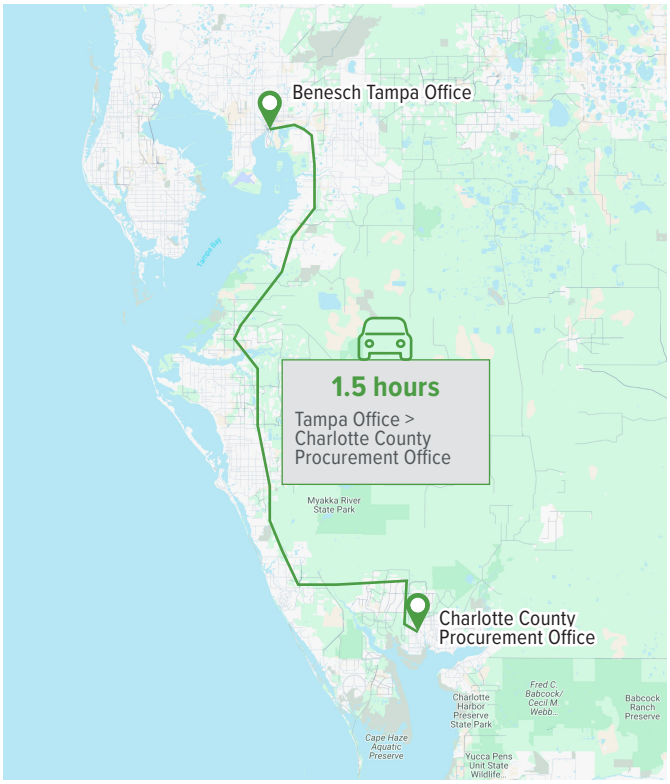
In the past 24 months, Benesch has received payments from Charlotte County totaling $345,523.

$301,583 is from a five-year contract for a Transportation Development Plan Major Update and $43,940 is from an ADA project.

# IX
# Location

### Rapid Response Time

The Benesch Tampa office is conveniently located just 1.5 hours from the Charlotte County Procurement Office, allowing the team to easily drive to the client whenever in-person support is needed. This proximity ensures responsive service and direct engagement throughout the project.



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# X
# Litigation

*We appreciate the opportunity to submit our proposal. As requested, our detailed litigation history is provided on the following pages. **None of these cases are related to our public finance work.** We look forward to potentially providing our services to Charlotte County once again.*

**OUTSTANDING CLAIMS AND LITIGATION**

*Case Name: Bradley Mirly v. THE CITY OF CHICAGO, G&V CONSTRUCTION COMPANY, INC., J.E.M TRAFFIC CONTROL II CORP., C*NECT d/b/a CIVILTECH ENGINEERING, INC., and ALFRED BENESCH & COMPANY*

- Case Number/Court: 2024 L 010011; Circuit Court of Cook Co., Illinois, Law Division
- Project Name/Owner: Program and contract administration for the City of Chicago, Chicago Department of Transportation
- Basis: On August 22, 2025, Benesch received notice that it had been added as a Defendant in this matter. On September 13, 2023, plaintiff was riding his electric scooter when he hit something in the bike lane causing him to fall off the scooter sustaining injury. The location was under construction by G&V Construction as part of one of the Work Orders issued through CNECT. Benesch was the resident engineer for this Work Order. No construction activity occurred on the site that day and Benesch's records indicate the bike lane was closed with a posted detour for the construction.
- Status: Ongoing. It is unlikely that Benesch has any liability in this matter.

*Case Name: Ryan Erickson v. THE CITY OF CHICAGO, S&J CONSTRUCTION CO., INC, KAPO CONSTRUCTION INC., CHICAGO BRIDGE INSPECTION TEAM LLC*

- Case Number/Court: 2024 L 006315; Circuit Court of Cook Co., Illinois, Law Division
- Project Name/Owner: CDOT Professional Bridge Inspection Services (2022-2023), Illinois Department of Transportation
- Basis: On July 17, 2025, Benesch received notice that its Joint Venture with Chicago Bridge Inspection Team LLC had been named as an Apportionment Defendant in this matter. The suit stems from an incident that occurred on June 10, 2023, when Plaintiff was riding their low-speed scooter south across the bicycle path located on the Outer Driver Bridge when they struck an alleged defect in the paving surface and/or Expansion Joint causing them to lose control of the scooter and fall.
- Status: Ongoing. It is unlikely that Benesch has any liability in this matter.

*Case Name: Peggy Vasko v. H374 LLC & Schwartz Realty Corp. v. Alfred Benesch & Company, Inc.*

- Case Number/Court: CV 24 6196128 S; the Superior Court of the State of Connecticut in Hartford
- Project Name/Owner: Sycamore Street Development, Schwartz Realty
- Basis: On May 1, 2025, Benesch received notice that it had been named as an Apportionment Defendant in this matter. The original complaint against Schwartz Realty alleged that, on April 26, 2023, plaintiff sustained personal injuries when she tripped and fell over a precast concrete wheel stop in an accessible parking area of 400 Hebron Avenue, Glastonbury, CT, while walking through the parking lot to go shopping at Trader Joe's. Benesch was engaged in 2018 to provide civil site engineering for this site.
- Status: Ongoing. It is unlikely that Benesch has any liability in this matter.

*Case Name: Kevin W. Schmidt, Individually and as Representative of THE ESTATE OF TERRI L. SCHMIDT, Don and Lois Corning, and Michael Johnson and Roberta Rosa v Aaron Nash, Lyons Limousuine, LLC, Patrick Richard Lyons, Mary Lyons, Zenith Limosusine, LLC, Edward Kraemer & Sons, Kenny Construction Company, Kenny-Kraemer Joint Venture, Plote, Inc., Plote Construction, Inc., Roadsafe Traffic Systems, Inc., a foreign corporation, Traffic Control and Protection, Inc., GFS Construction, LLC, Omega & Associates Inc., The Roderick Group Inc., P.C., Exp. U.S. Service, Inc., Thomas Engieering Group LLC, Alfred Benesch & Company, V3 Companies of Illinois LTD, V3 Companies LTD, BV3 Joint Venture*

- Case Number/Court: 2016L0105074, 16 L5389, 2017 L 07057 and 16 L003443; Circuit Court of Cook Co., Illinois, Law Division
- Project Name/Owner: ISTHA Design Corridor Management Services for Reconstruction and Lane Addition on the Jane Addams Memorial Tollway (I-90) from the Kennedy Expressway to Elgin Toll Plaza and Higgins Road to Elgin Toll Plaza; The Illinois State Toll Highway Authority
- Basis: The suit stems from a March 25, 2016 limousine accident in a construction zone on I-90 in Elgin, IL near the Stage 3B area of construction. Benesch did the design of this section. According to news reports, the limo driver was blinded by sunshine and struck the concrete barrier. One

person died and 6 others were injured. This is the second suit filed relating to this accident. Benesch received notice that it had been named in this suit on October 5, 2016.
- Status: Ongoing. It is unlikely that Benesch has any liability in this matter.

**RESOLVED CLAIMS AND LITIGATION**

***Case Name: Sun City Carolina Lakes Community Association v. Pulte Home Company, LLC v. Third Party Defendants: WRG Design, Inc.; Susman Tisdale Gayle Architects, Inc., A/K/A STG Design as Successor in Interest to and/or Merger with BMG, Inc, AIA; Blythe Development Co.; Scurry Construction, Inc.; Choate Construction Company; REA Contracting, LLC; ESP Associates, Inc.; Southern Shade Tree Co., Inc.; Pipeline Irrigation, LLC; Impact Landscaping LLC; Ecoscape Solutions Group, LLC; CK Contracting, Inc.; Hoopaugh Grading Company, LLC; Edwards Construction Services, Inc., Carolina Civil LLC; and Carolina Site Work, LLC; Merrick & Company as Successor in Interest to and/or Merger with Turnbull/Sigmon Design, P.A.; Alfred Benesch & Company as Successor in Interest to and/or Merger with Site Solutions, Inc.; Salas; O'Brien South, LLC as Successor in Interest to and/or Merger with HESM&A, Inc.***
- Case Number/Court: 2019-CP-29-01675; State of South Carolina, County of Lancaster, The Court of Common Please the Sixth Judicial Circuit
- Project Name/Owner: Various projects related to Sun City Carolina Lakes Community Association
- Basis: On September 25, 2022, Benesch received a Summons indicated that it has been added as a Third-Party Defendant in this matter. This suit stems from a residential development for which an acquired company, Site Solutions, provided services. The summons received did not include information sufficient to determine the allegations specific to services provided by Site Solutions
- Outcome: This matter was settled through negotiation in June, 2025. Benesch contributed a minimal amount toward settlement, but the details of the settlement are subject to a confidentiality agreement.

***Case Name: Diamond Grant v. Esurance Property and Casualty Insurance Company, Alex Spradlin and Alfred Benesch & Company***
- Case Number/Court: 23-003227-NI; State of Michigan Third Judicial Circuit Wayne County
- Basis: On May 5, 2023, Benesch received a summons indicating that it had been added as a defendant in this matter. This suit stems from a vehicle accident in which Benesch employee, Alex Schultz-Spradlin, was involved on May 25, 2022. Plaintiff alleges that Schultz-Spradlin operated his vehicle in a careless, negligent, willful and wanton, grossly negligent and/or reckless manner.
- Outcome: This matter was resolved as a result of a settlement conference on December 23rd, 2024. Our fleet insurance carrier, Old Republic Insurance Company, paid $40,000 on our behalf.

***Case Name: Latara Connor v. 606 W. Aldine Condo Assn, City of Chicago, Cardi Asphalt, G&V Construction Company, Inc. v. Third Party Defendants Alfred Benesch & Company (d/b/a Benesch), ABC Engineering of NY P.C. (d/b/a Benesch Engineering), APS Consulting, Inc., and the United States Postal Service***
- Case Number/Court: 2022L006605; State of Illinois Circuit Court, Cook County
- Project Name/Owner: 606 West Aldine Avenue Allen Return; City of Chicago Department of Transportation
- Basis: On March 7, 2024, Benesch received a summons indicating it had been added as a third-party defendant in this matter. This suit stems from a trip and fall accident by a mail carrier on April 23, 2022. Benesch's records indicate that work at the site in question was completed on December 8, 2021. Benesch provided construction engineering services on this project as a subconsultant to CNECT, a JV partnership between Civiltech and Infrastructure Engineering.
- Outcome: This matter was settled through negotiations on December 17th, 2024 with Benesch's general liability carrier, Travelers, agreeing to contribute $10,000 towards the settlement.

***Case Name: Riley Loop v. F.H. Paschen, S.N. Nielsen and Associates LLC, Highway Safety Corp, Chicago Park District, City of Chicago, and Alfred Benesch & Company d/b/a Benesch Engineering***
- Case Number/Court: 23L4139; State of Illinois Circuit Court, Cook County
- Project Name/Owner: 43rd Street Pedestrian Bridge over Metra/CNRR and Lake Shore Drive, City of Chicago Department of Transportation
- Basis: On March 28, 2024, Benesch received a summons indicating it had been named as a defending in this suit which stems from a bicycle accident that occurred on May 10, 2022, when the plaintiff's bike became entangled in caution tape that was not secured and plaintiff was thrown

from the bike. Benesch provided Construction Engineering Services for this project which was a new pedestrian bridge leading to Burnham Park and crossing over Lake Shore Drive at 43rd Street.
- Outcome: This matter was settled during mediation on November 5, 2024. Benesch contributed a minimal amount toward settlement, but the details of the settlement are subject to a confidentiality agreement.

***Case Name: Josue Martinez v. Orange Crush, LLC, Benesch Engineering, ABC Engineering of NY, P.C. and R.T. Millord Co., and Builders Paving, LLC, et al.***
- Case Number/Court: 2023L006669; State of Illinois Circuit Court
- Project Name/Owner: 63rd Street CY Construction Management Services; CSX Intermodal Terminals, Inc.
- Basis: On July 20, 2023, Benesch received a Summons indicating that it has been added as defendant in this matter. This suit stems from an injury sustained by a construction worker on September 1, 2022, when the worker was pinned between a paving machine and roller machine that were operating at the site, crushing the workers right leg.
- Outcome: This matter was settled during mediation on October 16, 2024. Benesch contributed a minimal amount toward settlement, but the details of the settlement are subject to a confidentiality agreement.

***Case Name: Michele Castaneda and Manual Castaneda v. Cit of Bettendorf v. Chhabria A. Harris and Alfred Benesch & Company***
- Case Number/Court: 4:22-cv-04101; United States District Court for the Central District of Illinois
- Project Name/Owner: I-74 Bridge of the Mississippi River; Iowa Department of Transportation
- Basis: On August 24, 2022, Benesch received a Summons indicated that it has been added as a Third-Party Defendant in this matter. This suit stems from an automobile/pedestrian fatality accident that occurred on May 22, 2022, when a drunk driver in an SUV entered the pedestrian path on the bridge and struck three (3) pedestrians. Benesch was the lead designer for the bridge. Installation of bollards was discussed during the design process, but the client elected not to have them included as part of the design.
- Outcome: This matter settled in mediation in July 2024, with all the municipal parties and design parties agreeing to separate, confidential global settlements to bring this matter to an early resolution

***Case Name Ashley Thrasher v. Douglas County, Nebraska, Hawkins Construction, and Alfred Benesch & Company***
- Case Number/Court: D01C1220003569; District Court of Douglas County, Nebraska
- Project Name/Owner: Q Street Improvements; 181st Plaza to 193rd Street; Douglas County, Nebraska
- Basis: On March 22, 2018, Benesch received a Complaint in the above referenced suit. This suit stems from an automobile/pedestrian accident that occurred on March 18, 2016. The accident happened in the early morning following St. Patrick's Day and involved a teenage girl who stepped into the roadway and was struck by a car in an area of the project that had no sidewalk (prior to or during construction). Benesch provided design services for this project, but did not provide construction observation.
- Outcome: This matter was resolved through mediation on May 11, 2023. Benesch contributed a minimal amount toward settlement, but the details of the settlement are subject to a confidentiality agreement.

***Case Name: Joann Welsh, Edward Larsen, John K. Fitzgerald, Jean A. Fitzgerald, John Netto, Thomas F. McEvoy, Jr., Thomas F. McEvoy, III, Donna McEvoy, Michelle Dicapua, James D. McEvoy, Rita McEvoy, Joey Ann Liquigly v. City of Derby, Turco Golf, Inc., Kaestle Boos Architects, Inc.; Turco Golf apportionment claim v. Langan Engineering and Environmental Services, Inc., Alfred Benesch & Company, Turner Construction Company, and John J. Brennan Construction Company, Inc.***
- Case Number/Court: 19 6035346-S; Superior Court J.D. of Ansonia at Milford
- Project Name/Owner: Derby High School Athletic Fields; City of Derby, Connecticut
- Basis: On September 25, 2018, the combination of heavy rainfall (5.8") and the Contractor failing to follow Benesch's design drawings led to a flooding issue downstream that allegedly caused flooding affecting adjacent homeowners. Benesch was a sub to KB, an architectural firm, for design of new athletic fields for Derby High School in Connecticut. Benesch provided engineering support for design (including drainage) and limited construction administration services, but construction observation was not included in the scope. On September 12, 2019, a suit was filed by the homeowners against (1) The City of Derby (2) Turco Golf, Inc. and (3) Kaestle Boos Associates, Inc. On December 27, 2019, Turco Golf filed an Apportionment Complaint against Langan Civil Engineers, Benesch, Turner Construction and John J. Brennan Construction. The apportionment complaint doesn't seek affirmative relief,

it just seeks to limit Turco's liability. In order for Benesch to have liability, the plaintiff or one of the other original defendants would have to plead over seeking liability against Benesch.
- Outcome: This matter was resolved through mediation and negotiations in August 2023. Benesch contributed $45,000 to a settlement with our general liability carrier, Travelers, paying 50%.

***Case Name: Mashantucket Pequot Tribal Nation (MPTN) v. Alfred Benesch & Company and South Coast Development***
- Case Number/Court: CV-P1-2014-135; Mashantucket Pequot Tribal Court
- Project Name/Owner: MPTN Gas Station; Mashantucket Pequot Gaming Enterprise
- Basis: On November 26, 2018, the Mashantucket Pequot Gaming Enterprise named Benesch as a third-party defendant in this matter seeking contractual indemnification for amounts they paid in settlement. This project was initially contracted by Purcell and Associates (an acquired company), but was completed shortly after the merger with Benesch in 2012. This suit stems from a case filed by Bethany Lemire alleging that on May 13, 2013, she sustained injuries stepping off a sidewalk that intersected with a handicapped slope that was designed by Purcell; however, the contractor and client intentionally deviated from Benesch's design during construction.
- Outcome: This matter settled during mediation on August 15, 2022. Benesch contributed a minimal amount toward settlement, but the details of the settlement are subject to a confidentiality agreement.

***Case Name: Livingston County Board of Public Works v. Action Traffic Maintenance, Inc., Alfred Benesch & Company, and Ajax Paving Industries, Inc.***
- Case Number/Court: 23-31936; State of Michigan 44th Circuit Court for the County of Livingston
- Project Name/Owner: US-23 Construction Engineering Services; County of Livingston, MI
- Basis: On Friday, August 11, 2023 received a Summons indicating it had been named as a defendant in this matter. Benesch was responsible for construction engineering services on this project. The suit stems from underground facilities that were damaged by Action Traffic on or about November 7-8, 2022, which subsequently resulted in a sink hole resulting in claimed damages for repairs in the amount of $405,522.79.
- Outcome: Benesch was dismissed in this matter by the Client given that there was no contractual relationship.

***Case Name: Michael Albertini and Karen Schejbal v. Lorig Construction and Alfred Benesch & Company***
- Case Number/Court: 2019L008148; Circuit Court of Cook County, Illinois County Department, Law Division
- Project Name/Owner: IDOT 60X75 EB I-290 over I-90/94 and Des Plaines to Canal; Illinois Department of Transportation
- Basis: On August 1, 2019, Benesch received a complaint naming it as a defendant in a suit stemming from an injury that was sustained by an Area Equipment employee on November 14, 2018, on a project at Canal Street under the Congress Expressway. Benesch provided design services for a temporary shoring plan on this project to Area Equipment, who was a sub-contractor to Lorig Construction, under the terms of an on-call professional services agreement with Area. Benesch's scope did not include any project site services, nor did Benesch have any employees on site, and had no knowledge of the injury until servced with the complaint.
- Outcome: This matter was settled during mediation on March 31, 2022, for a total of $1.6 million. Benesch's general liability carrier, Travelers, agreed to contribute $50,000 to bring the matter to a close.

***Case Name: Nemaha Landscape Construction, Inc. v. City of York, Nebraska v. Alfred Benesch & Company.***
- Case Number/Court: CI19-44; District Court of York County, Nebraska
- Project Name/Owner: York Ballfield Complex; City of York, Nebraska
- Basis: On February 16, 2021, Benesch received a summons indicating it had been named as a third-party defendant in this matter. The case stems from a claim by Nemaha in June 2017, for extra work and backcharges related to the construction of the York Ballfield Complex. The main dispute centers around cracking of the concrete in the dugouts, which the contractor claims are design defects and Benesch (and York) maintain that the design of the slabs was delegated to the contractor.
- Outcome: This matter was settled pre-trial in July 2021, with Benesch and the City each agreeing to contribute $15,000 to a $30,000 settlement.

***Case Name: Albert Sanchez v. Shalonda Bobo, City of Chicago, G&V Construction Company, Inc., Metromex Contractors, Inc., and Alfred Benesch & Company***
- Case Number/Court: 2018 L 005438; Circuit Court of Cook County, IL, County Department Law, Law Division
- Project Name/Owner: Task Order for Bus Pad at 26th &

Pulaski; City of Chicago Department of Transportation
- Basis: On January 19, 2021, Benesch received notice that it had been added as a defendant in a lawsuit that resulted from a vehicle collision at 26th Street and Pulaski on September 22, 2017, allegedly as a result of construction occurring at the intersection. Benesch was a subconsultant to C*NECT, a joint venture between Civiltech and Infrastructure Engineering, under a contract for Project Management Consulting for Capital Improvement Projects.
- Outcome: This case settled during a pre-trial conference on March 17, 2021, with plaintiff agreeing to accept $50,000. Benesch's general liability carrier agreed to contribute $10,000 to the settlement in an effort to bring the matter to a quick resolution.

***Case Name: Mazen Fiala v. Northeast Regional Commuter Railroad Corporation, D/B/A Metra Rail, and Commuter Rail Construction Team, LLC***
- Case Number/Court: 20183008026; Circuit Court of Cook Co., Illinois, Municipal Department, Third District
- Project Name/Owner: Construction Management Services for MD-N Healy Station; Chicago, Illinois; Northeast Regional Commuter Railroad Corporation, D/B/A Metra Rail
- Basis: On August 5, 2019, Benesch was served with a complaint in which Commuter Rail Construction Team (CRCT) was named as a defendant. CRCT is a joint venture between Benesch and V3 providing Construction Management Engineering Services for various METRA capital projects, which are assigned on a task-order basis. This suit stems from a trip and fall accident that occurred on December 1, 2017, at Healy Station. A train overshot the platform, and Fiala allegedly tripped and fell over a metal object that was protruding from gravel near one of the platforms when walking across the gravel to board the train.
- Outcome: This matter was resolved through direct negotiations on February 24, 2021. Benesch contributed a minimal amount toward settlement, but the details of the settlement are subject to a confidentiality agreement.

***Case Name: John McCracken and Lauren McCracken v. PennDOT, J.D. Eckman, Inc., Urban Engineers, Inc., Alfred Benesch & Company and Allstate Insurance Company***
- Case Number/Court: 2019-008545; Court of Common Pleas, Delaware County, Pennsylvania
- Project Name/Owner: SR 0322, Section 101 Improvement Project; Pennsylvania Dept. of Transportation
- Basis: On December 4, 2019, Benesch received a complaint naming it as a defendant in this suit claiming that each defendant, by and through their agents, workers and/or subcontractors performed demolition, excavation, and construction involving the operation of heavy construction equipment, machinery and vehicles in close proximity to the border of plaintiff's property, and alleging that plaintiffs subsequently had damage to their property due to the destructive vibrations in the excavation of the property and roadway near plaintiff's property. Benesch had design and construction engineering services, but did not provide construction observation
- Outcome: On February 11, 2021 a settlement was reached among the parties with plaintiffs agreeing to accept $60,000, with Benesch's general liability carrier contributing $4,000.

***Case Name: Carlos M. Cruz v. Alfred Benesch & Company et al.***
- Case Number/Court: S-583-18; Court of Common Pleas of Schuylkill County, Pennsylvania Civil Division
- Project Name/Owner: Collapsed Multiple Building Evaluation (Coal & Race Streets); Borough of Shenandoah
- Basis: On June 19, 2018, Benesch received a Complaint in which the company and two of our employees were named as defendants in the above referenced suit, along with 20 other individuals/entities. The suit stems from a request from the Borough to investigate the structural integrity of multiple structures sited on parcels 64-02-0006.000 and 64-02-0003.002. The investigation was conducted by Benesch employee, Dominic Yannuzzi, who determined that the buildings were unsafe and constituted a dangerous structure or premises according to the Borough's ordinance. The basis of the Complaint is that a neighbor had an illegal sewer hookup to the Plaintiff's sewer lateral, which ultimately caused all the damage to the subject properties. There was an extensive legal battle between the Borough and Cruz, which required Yannuzzi to testify in court. The Complaint does not list any grievances with Benesch's evaluation. A second Benesch employee, Ed Bosack, was also named as a defendant, but he had no involvement in the inspection.
- Outcome: Plaintiff abandoned this case and Benesch, along with the two employees named as defendants in this action were dismissed from the case with prejudice on December 28, 2020.

***Case Name: Bethany Lemire v. James P. Purchell Associates (aka Alfred Benesch & Company) and South Coast Development LLC***
- Case Number/Court: KNL-CV-19-6043315-S; State of

Connecticut, Superior Court in New London

- Project Name/Owner: MPTN Gas Station; Mashantucket Pequot Gaming Enterprise
- Basis: On October 23, 2019, plaintiff Bethany Lemire filed suit directly against Benesch and South Coast Development in state court. This case is related to the same matter Lemire previously filed in tribal court against the Mashantucket Pequot Gaming Enterprise, and in which Benesch was named a third-party defendant for the purpose of contractual indemnification by the MPTN. This project was initially contracted by Purcell and Associates (an acquired company), but was completed shortly after the merger with Benesch in 2012. This suit was filed by Bethany Lemire alleging that on May 13, 2013, she sustained injuries stepping off a sidewalk that intersected with a handicapped slope that was designed by Purcell.
- Outcome: This matter was resolved as the result of a settlement conference in October 2020. Benesch contributed a minimal amount toward settlement, but the details of the settlement are subject to a confidentiality agreement

# XI
# Minority Business

Benesch is not a certified Minority Business (MBE).

# XII
# Required Forms

**PART IV - SUBMITTAL FORMS**
**PROPOSAL SUBMITTAL SIGNATURE FORM**

| 1. | Project Team Name and Title | Years experience | City of office individual will work out of for this project | City individual's office is normally located | City of individual's residence |
|---|---|---|---|---|---|
| | Nilgün Kamp, AICP - Public Finance Group Manager | 32 | Tampa, FL | Tampa, FL | Tampa, FL |
| | Robert Layton - Technical Manager | 17 | Tampa, FL | Tampa, FL | Tampa, FL |
| | Morgan McLeod, AICP - Senior Planner | 6 | Tampa, FL | Tampa, FL | Fort Myers, FL |
| | Logan Patterson, AICP - Planner | 4 | Tampa, FL | Tampa, FL | Palm Harbor, FL |
| | Steve Infanti, AICP - Technical Manager | 22 | Tampa, FL | Tampa, FL | Citrus Springs, FL |
| | Elisabeth Schuck AICP, LEED GA - FL Division Manager | 23 | Tampa, FL | Tampa, FL | Tampa, FL |
| | | | | | |
| | | | | | |
| | | | | | |

| 2. | Magnitude of Company Operations | |
|---|---|---|
| | A) Total professional services fees received within last 24 months: | $ 590,307,091 |
| | B) Number of similar projects started within last 24 months: | 22 |
| | C) Largest single project to date: | $ 43,153,470 (on-going, multi-year contract) |

| 3. | Magnitude of Charlotte County Projects | |
|---|---|---|
| | A) Number of current or scheduled County Projects | 2 (One being a 5-year contract) |
| | B) Payments received from the County over the past 24 months (based upon executed contracts with the County). | $ 345,523 |

| 4. | Sub-Consultant(s) (if applicable) | Location | % of Work to be Provided | Services to be Provided |
|---|---|---|---|---|
| | N/A | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| 5. | Disclosure of interest or involvement: List below all private sector clients with whom you have an active pending contract and who have an interest within the areas affected by this project. Also, include any properties or interests held by your firm, or officers of your firm, within the areas affected by this project. | |
|---|---|---|
| | Firm N/A | Address |
| | Phone # | Contact Name |
| | Start Date | Ending Date |
| | Project Name/Description | |
| | | |
| | | |
| | | |
| | | |

**NAME OF FIRM** Benesch

**(This form must be completed and returned)**

| | |
|---|---|
| **6. Minority Business:** The County will consider the firm's status as an MBE or a certified MBE, and also the status of any sub-contractors or sub-consultants proposed to be utilized by the firm, within the evaluation process. | **Yes** _____ **No** ✓ |
| **Comments or Additional Information:** | |
| | |
| | |

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per contract, if the firm is awarded the Contract by the County. The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

By signing this form, the proposer hereby declares that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

In accordance with section 287.135, Florida Statutes, the undersigned certifies that the company is not on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and does not have business operations in Cuba or Syria (if applicable) or the Scrutinized Companies that Boycott Israel List, or is not participating in a boycott of Israel.

As Addenda are considered binding as if contained in the original specifications, it is critical that the Consultant acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No._____ Dated_____ Addendum No._____ Dated_____ Addendum No._____ Dated_____

Addendum No._____ Dated_____ Addendum No._____ Dated_____ Addendum No._____ Dated_____

Type of Organization (please check one): INDIVIDUAL (__) PARTNERSHIP (__)
CORPORATION (✓) JOINT VENTURE (__)

Alfred Benesch & Company (Benesch) — Firm Name
312-565-0450 — Telephone

Benesch — Fictitious or d/b/a Name
36-2407363 — Federal Employer Identification Number (FEIN)

35 West Wacker Drive, Suite 3300 — Home Office Address

Chicago, IL 60601 — City, State, Zip
79 — Number of Years in Business

1000 N. Ashley Dr., Ste. 400 — Address: Office Servicing Charlotte County, other than above

Nilgün Kamp, AICP — Name/Title of your Charlotte County Rep.
813-825-1225 — Telephone

Elisabeth Schuck AICP, LEED GA — Name/Title of Individual Binding Firm (Please Print)

Elisabeth Schuck — Signature of Individual Binding Firm
September 18, 2025 — Date

eschuck@benesch.com — Email Address

**(This form must be completed & returned)**

## DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that Alfred Benesch & Company (Benesch) (name of business) does:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).

4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.

5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.

6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Elisabeth Schude
Proposer's Signature

September 18, 2025
Date

**NAME OF FIRM** Benesch

**(This form must be completed and returned)**

## HUMAN TRAFFICKING AFFIDAVIT
## for Nongovernmental Entities Pursuant To FS. §787.06

### Charlotte County Contract #20250641

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.

2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.

3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.

4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.

Elisabeth Schuck

Signature

Elisabeth Schuck AICP, LEED GA

Printed Name

Florida Division Manager

Title

Alfred Benesch & Company (Benesch)

Nongovernmental Entity

September 18, 2025

Date

**END OF PART IV**

**NAME OF FIRM** Benesch

**(This form must be completed and returned)**