

Ways and Means Committee
5:00 p.m., Tuesday, November 19, 2019
City Hall
1207 Palm Boulevard, Isle of Palms, South Carolina

AGENDA

1. **Call to order** and acknowledgement that the press and public were duly notified of the meeting in accordance with the Freedom of Information Act.
2. **Approval of previous month's minutes**
Regular meeting of October 15, 2019
3. **Citizens' Comments**
4. **Financial Statements** - Treasurer Debbie Suggs
 - A. Financial Reports
 - B. Project Worksheets
5. **Old Business**
6. **New Business**
 - A. Recommendation from the Accommodations Tax Advisory Committee for the City to approve sponsorship request from the IOP Turtle Team and the IOP Exchange Club for the Isle of Palms Turtle Hatchling Scavenger Hunt in the amount of \$6,000 [State ATAX, General Government, Programs/Sponsorships - \$85,000, pg.22, ln.20]
 - B. Recommendation from the Public Safety Committee to approve unbudgeted expenditure in an amount not to exceed \$10,000 for the purchase and installation of a surveillance camera at Breach Inlet
 - C. Recommendation from the Public Safety Committee to implement a Reserve Officer program in the Police Department
 - D. Recommendation from the Real Property Committee to apply to the Greenbelt Program to use the City's allocation for the construction of an ADA Compliant Beach Walkover & Observation Deck at 42nd Avenue
 - E. Consideration of an award to Insight Group, LLC in the amount of \$26, 840 for construction management services for the Public Safety Building Repair Project [Capital Projects, Police, Capital Outlay - \$1,209,000, pg.16, ln. 29; Capital Projects, Fire, Capital Outlay - \$2,324,500, pg.16, ln.41]
 - F. Consideration of approval of an amount not to exceed \$100,000 for the 12-month rental of one (1) double and one (1) triple-wide temporary offices for the Police and Fire Departments to use during the rehabilitation of the Public Safety Building [Capital Projects, Police, Capital Outlay - \$1,209,000, pg.16, ln. 29; Capital Projects, Fire, Capital Outlay - \$2,324,500, pg.16, ln.41]
7. **Miscellaneous Business**
Next Meeting Date: 5:00 p.m., Tuesday, January 21, 2020 in City Hall
8. **Executive Session – If needed**
Upon returning to open session, the Committee may take action on matters discussed in Executive Session
9. **Adjournment**

WAYS AND MEANS COMMITTEE
5:00pm, Tuesday, October 15, 2019
Council Chambers
1207 Palm Boulevard, Isle of Palms, SC

MINUTES

1. Call to order

Present: Mayor Carroll, Council members Ward (Chair), Ferencz, Rice, Kinghorn, Bell

Absent: Council Member Smith, Council Member Moye

Staff Present: Administrator Fragoso, Asst. City Administrator Hanna, Treasurer Suggs, City Department Heads

2. Approval of Previous Meeting's Minutes

Council Member Rice made a motion to approve the minutes of the September 17, 2019 meeting, and Council Member Bell seconded the motion. The minutes passed unanimously.

3. Citizen's Comments – none

4. Financial Report – Treasurer Debbie Suggs

Treasurer Suggs gave the monthly Financial Report. She noted the materials provided to Committee members was abbreviated due to the IT difficulties in City Hall this week. She noted that all departments are at or below their budgeted spending levels, adding not a lot of spending has occurred so far this fiscal year. Council Member Ward said he would like to meet with her later in the week to get more financial details before the City Council meeting.

MOTION: Council Member Ward made a motion to amend the order of the agenda so that discussion of the \$16M bond for the Water & Sewer Commission could be held first. Council Member Bell seconded the motion. The motion passed unanimously.

5. New Business

A. Consideration of recommendation from the Public Works Committee to approve a \$16M bond for the decommissioning of the Wild Dunes Waste Water Treatment Plant and the consolidation and expansion of the Forest Trail Waste Water Treatment Plant which shall be available only when the functions of the IOP Water and Sewer Commission become a department of the City of Isle of Palms

Mr. Jay Leigh, Vice-Chair of the Water & Sewer Commission, spoke about the need for the bond to shut down an older waste water treatment plant and focus on the growth of the sewer system. He believes the idea of bringing the Water & Sewer Commission into the City government is a long-term process and melding the two issues is “not something we can really work with.” Due to the current state of the bond market, he said waiting a few months to discuss the bond might be a good idea.

Council Member Rice noted the wording of the recommendation from the Public Works Committee was meant to reflect the Committee’s uneasiness with the transition period the Water & Sewer Commission now finds itself in. She said the current situation feels “super unhealthy” and there needs to be more oversight. Council Member Bell also expressed frustration with the process of working with the Water & Sewer Commission and stated “good, collaborative conversations” are needed moving forward.

MOTION: Council Member Ferencz made a motion to defer further consideration of the bond for the Water & Sewer Commission for a few months. Council Member Buckhannon seconded the motion.

Council Member Kinghorn posed several questions to the Committee:

- Why wouldn’t you want a full-service city?
- Why wouldn’t you want to control our own destiny related to these two key services?
- Who would support the debt request from a personal level given the information we have here?
- Why wouldn’t you want to cross train and use the economies of scale across departments?
- Why wouldn’t you want to be directly responsible for the safety and fire to citizens as related to water?
- Why wouldn’t we want to be fully responsible for the Water & Sewer finances, rates, debt, revenue, and the quality of service?
- When there was a bond increase of this magnitude in the past, what happened to the rates afterwards?

Council Member Kinghorn asked that the Mayor and the Chair of Public Works discuss the answers to these questions when evaluating. Council Member Ward thank the members of the Water & Sewer Commission for attending this evening’s meeting and said he believed deferring the matter is a smart thing to do.

In response to Council Member Bell asking for the City’s opinion on the process of absorbing the Water & Sewer Commission into the City, Administrator Fragoso said that State Law spells out this process. The Water and Sewer Commission must unanimously vote to dissolve itself and request to be brought in back to the City. The other way is for 30% of registered voters of the City to sign a petition asking the City to acquire the Water and Sewer Commission. If such a petition is received, the question would be presented through a referendum.

VOTE: The motion passed unanimously.

6. **Old Business**

A. Discussion and consideration of engaging the services of First Tryon related to capital planning and potential debt issuance in the amount not to exceed \$25,000

Administrator Fragoso briefly reviewed the services provided by First Tryon as outlined in their proposed work order included in the meeting packet. She stated staff is requesting approval of this expenditure as it will make their jobs easier, more transparent, and assist in strategic planning for the City's future.

MOTION: Mayor Carroll made a motion to approve the request, and Council Member Rice seconded the motion.

Council Member Bell expressed concern that he was unclear as to exactly what services they would be providing, and he would like more details about their consulting services.

When asked how the City handled bond issues in the past, Treasurer Suggs said they had been done through private banks. She added any cost savings seen by engaging this firm would be realized in helping the City make the right choices on these large financial questions.

Council Member Kinghorn asked if other firms had been considered for this request. Administrator Fragoso stated First Tryon is used by numerous local and statewide municipalities and that financial consulting services is not in the procurement code requiring multiple bids. Administrator Fragoso offered to get more detailed information from First Tryon prior to the November meeting of the Ways & Means Committee. Mayor Carroll and Council Member Rice withdrew the motion to approve.

7. **New Business**

B. Consideration of distribution of FY19 positive net result

Administrator Fragoso said that the General Fund is expected to generate revenues and transfers in excess of expenditures and transfers out equal to approximately \$2,000,000. In order to maintain a > 30% target in the General Fund the General Fund should retain approximately \$200,000 or 10%. Administrator Fragoso stated that the FY20 budget assumes \$1,233,890 of the FY19 positive net result is transferred into the Capital Projects Fund to cover expenses associated to the repairs to the Public Safety Building. Staff is requesting direction from City Council on how to distribute the difference of approximately \$566,000.

Administrator Fragoso reminded the Committee that the FY19 audited financial statements are not yet complete, therefore, these numbers are estimates.

MOTION: Council Member Ward made a motion to distribute \$200,000 to the General Fund, \$100,000 to the Disaster Recovery Fund and the remaining positive net result to the Capital Projects Fund.

VOTE: The motion passed unanimously.

8. **Miscellaneous Business**

The next meeting of the Ways & Means Committee will be on Tuesday, November 19, 2019 at 5:00pm in City Hall Council Chambers.

9. **Executive Session** – none needed

10. **Adjournment**

The meeting was adjourned at 5:41pm.

Respectfully submitted,

Nicole DeNeane
City Clerk

City of Isle of Palms
Financial Statement Summary as of October 31, 2019
(Dollars in Thousands)

	REVENUES						TRANSFERS IN / (OUT)						EXPENDITURES					
	YTD Actual	Annual Budget	Remaining to Collect	YTD Actual as a % of Budget	Current Annual Forecast	Forecast Above or (Below) Budget	YTD Actual	Annual Budget	Remaining to Transfer	YTD Actual as a % of Budget	Current Annual Forecast	Forecast Above or (Below) Budget	YTD Actual	Annual Budget	Remaining to Spend	YTD Actual as a % of Budget	Current Annual Forecast	Forecast Above or (Below) Budget
General	\$ 2,192	\$ 11,567	\$ 9,375	19%	\$11,567	\$ -	\$ -	\$ (239)	\$ 239	0%	\$ (239)	\$ -	\$ 3,278	\$ 11,328	\$ 8,050	29%	\$11,328	\$ -
Capital Projects	32	1,212	1,180	3%	1,212	-	-	1,137	(1,137)	0%	1,137	-	155	4,384	4,229	4%	4,384	-
Muni Accom Tax	746	1,636	890	46%	1,636	-	-	(459)	459	0%	(459)	-	183	2,309	2,126	8%	2,309	-
Hospitality Tax	268	828	560	32%	828	-	-	(230)	230	0%	(230)	-	57	746	689	8%	746	-
State Accom Tax	858	1,894	1,036	45%	1,894	-	-	(279)	279	0%	(279)	-	146	2,392	2,246	6%	2,392	-
Beach Prserv Fee	383	1,099	716	35%	1,099	-	-	-	-	-	-	-	7	484	477	1%	484	-
Marina	195	429	234	45%	429	-	-	74	(74)	0%	74	-	85	399	314	21%	399	-
Disaster Recovery	19	42	23	45%	42	-	-	-	-	-	-	-	38	10	(28)	380%	10	-
All Other	153	168	15	91%	168	-	-	(4)	4	0%	(4)	-	246	160	(86)	154%	160	-
Total All Funds	<u>\$ 4,846</u>	<u>\$ 18,875</u>	<u>\$ 14,029</u>	<u>26%</u>	<u>\$18,875</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>0%</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,195</u>	<u>\$ 22,212</u>	<u>\$ 18,017</u>	<u>19%</u>	<u>\$22,212</u>	<u>\$ -</u>

General Fund YTD Revenues							
	FY20 YTD Actual	FY20 Budget	% of FY20 Budget	FY19 YTD Actual	% of Prior YTD	Updated Annual Forecast	Forecast Above/ (Below) Budget
Prop Tax	\$ 43	\$ 4,399	1%	\$ 40	108%	\$ 4,399	-
LO Sales Tax	177	811	22%	89	199%	811	-
Business Lic	226	1,438	16%	213	106%	1,438	-
Rental Lic	706	1,020	69%	506	140%	1,020	-
Other Lic (Insurance/Utilities)	61	1,594	4%	7	871%	1,594	-
Build Pmts	125	568	22%	129	97%	568	-
From State	79	268	29%	3	2633%	268	-
Parking	524	947	55%	355	148%	947	-
All Other	251	523	48%	281	89%	523	-
Total	\$ 2,192	\$ 11,567	19%	\$ 1,623	135%	\$11,567	\$ -

General Fund YTD Expenditures							(YTD target = 33%)
	FY20 YTD Actual	FY20 Budget	% of FY20 Budget	FY19 YTD Actual	% of Prior YTD	Current Annual Forecast	
Mayor/Council	\$ 36	\$ 142	25%	\$ 31	116%	\$ 142	
General Govt	337	1,859	18%	427	79%	1,859	
Police	775	2,746	28%	836	93%	2,746	
Fire	1,131	3,313	34%	1,106	102%	3,313	
Public Works	452	1,433	32%	420	108%	1,433	
Build & Lic	146	441	33%	133	110%	441	
Recreation	305	1,045	29%	325	94%	1,045	
Judicial	64	223	29%	62	103%	223	
BSOs	32	126	25%	54	59%	126	
Total	\$ 3,278	\$ 11,328	29%	\$ 3,394	97%	\$11,328	

City of Isle of Palms Supplemental Financial Information as of October 31, 2019 *(Dollars in Thousands)*

Cash Balances		
	10/31/2019	10/31/2018
General Fund	4,547	2,483
As a % of GF Exp (target is > 30%)	40%	23%
Capital Projects	3,958	2,552
Disaster Recovery	2,492	2,383
Marina	730	971
Tourism Funds	6,084	4,946
Beach Restoration	-	1,322
Beach Preservation	2,999	1,662
Other Restricted	166	253
Total All Cash	20,976	16,572
Deposits at LGIP (2.2783%)	19,104	91%
Deposits at BBT	1,872	9%

Fund Balances				
Fund	6/30/2019 UNAudited Fund Balance (Note 1)	FY20 YTD Actual Net Revenues & Transfers Less Expenses	Current Actual Fund Balance	6/30/20 Forecasted Fund Balance
General Fund	\$ 3,420	\$ (1,086)	2,334	\$ 3,420
Capital Projects	5,772	(123)	5,649	3,737
Muni Accom Tax	1,622	563	2,185	490
Hospitality Tax	1,078	211	1,289	930
State Accom Tax	1,813	712	2,525	1,036
Beach Funds	2,620	376	2,996	3,235
Marina (See Note 1)	620	110	730	724
Disaster Recovery	2,598	(19)	2,579	2,630
All Other	249	(93)	156	253
Total All Funds	\$ 19,792	\$ 651	\$ 20,443	\$ 16,455

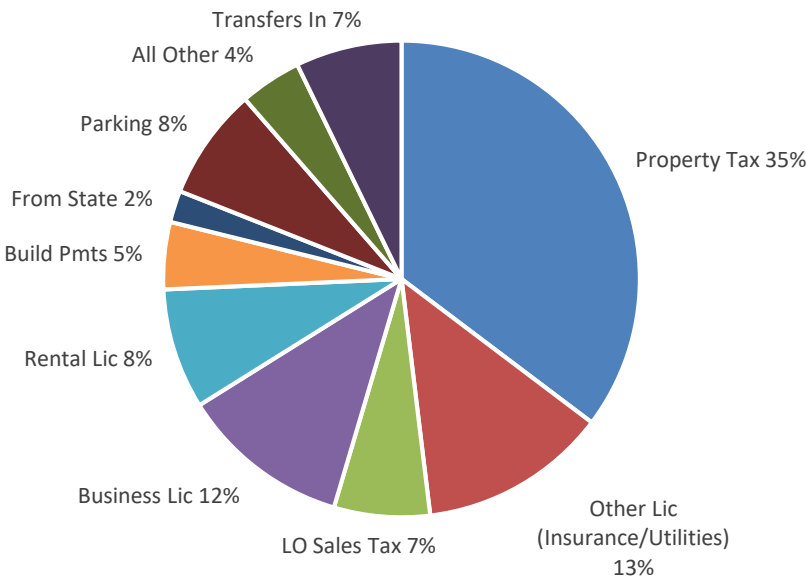
Note 1: The comparable amount for the Marina Enterprise Fund is not Fund Balance, but Net Position. To be consistent with the presentation of the other funds, the amount included here for the Marina is the Unrestricted Net Position, which does not include \$6,011,000 of fixed assets.

October Notes:

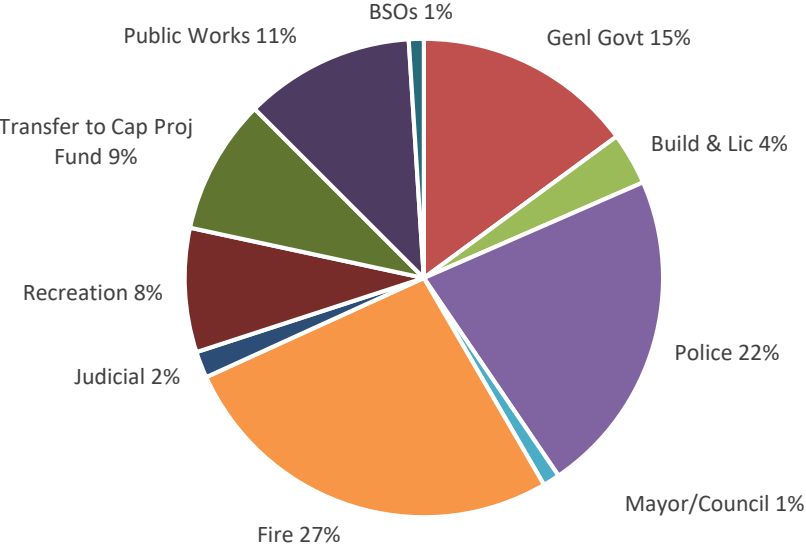
- One-third of the fiscal year has passed, and financial results continue to generally track as expected.
- General Fund revenues appear to be significantly ahead of the prior year (135%), but the majority of the increase relates to the timing of 1st quarter revenues from the State of SC (State Atax, Local Option Sales Tax and Aid to Subdivisions) that were received a month earlier in FY19.
- Total General Fund expenditures are slightly below both the prior year and the FY20 budget target of 33%.
- YTD personnel costs are slightly below the 33% budget target, although YTD overtime expense in Police, Fire and Public Works are ahead of budget due primarily to Hurricane Dorian. It is possible that the City will be able to recover some portion of Dorian related OT from FEMA.
- Tourism revenues for the 1st 4 months of the fiscal year are 1% below the prior year with the exception of State Accommodations Tax revenues which are 6% ahead for the 1st quarter.
- No other significant financial variances or trends were noted and currently the forecast for the year is the same as the budget.
- Cash positions and Fund Balances are strong due to the City's good financial performance in FY19 and little spending on the major FY20 projects - Public Safety Building repair, fire truck purchase, fire truck refurb and drainage.

City of Isle of Palms General Fund

FY20 General Fund Budget - Revenue & Transfers In
Total = \$12,465,365



FY20 General Fund Budget - Expenditures & Transfers Out
Total = \$12,465,365



Estimate Isle of Palms Residents' Cost of Service:

Assumes 4% Primary Residence Assessment Ratio
Cost relates to Property Taxes Only, Not Other Fees

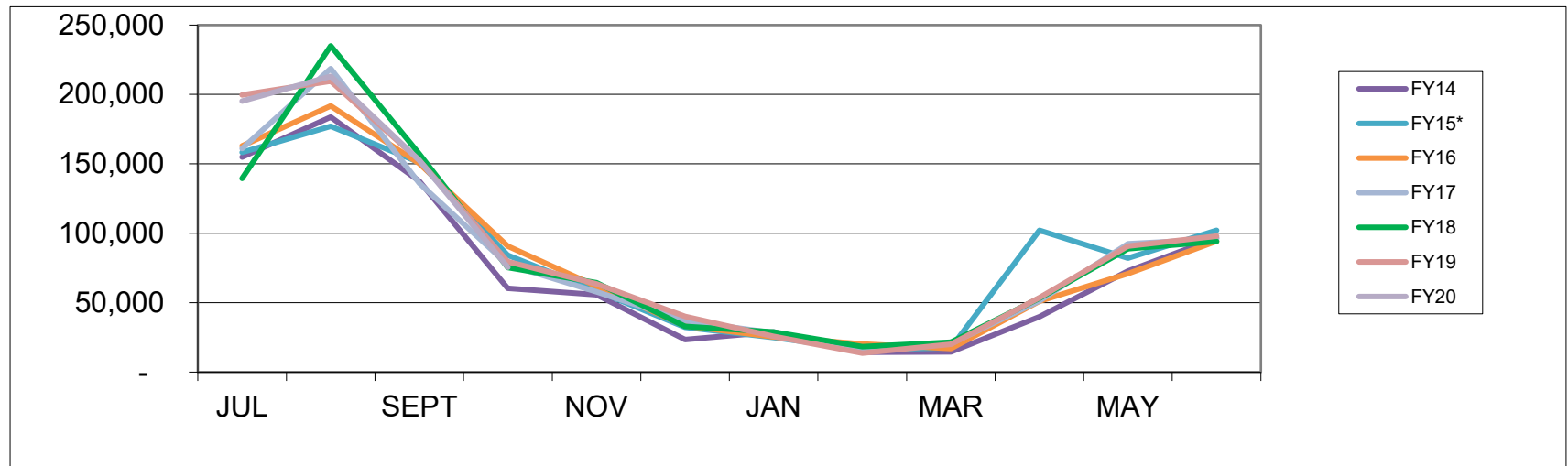
Isle of Palms Millage Rates:	
Operating Millage	0.0213
Debt Service Millage	0.0034
Total IOP Millage	0.0247
Local Opt SalesTax Credit	(0.0002)

Mayor & Council	142,205	1%
General Government	1,859,464	15%
Police	2,746,081	22%
Fire	3,312,615	27%
Public Works	1,432,655	11%
Building & Planning	440,572	4%
Recreation	1,045,322	8%
Judicial	223,179	2%
Beach Service Officers	125,989	1%
Transfers to Capital Projects Fund	1,137,284	9%

		Appraised Value		
FY12 General Fund Expense Budget	% of Gen Fund Expense	\$500,000	\$750,000	\$1,000,000
		Resident Property Tax by Department:		
142,205	1%	\$ 4.49	\$ 6.74	\$ 8.99
1,859,464	15%	58.77	88.16	117.55
2,746,081	22%	86.80	130.20	173.59
3,312,615	27%	104.70	157.06	209.41
1,432,655	11%	43.31	64.97	86.63
440,572	4%	13.93	20.89	27.85
1,045,322	8%	33.04	49.56	66.08
223,179	2%	7.05	10.58	14.11
125,989	1%	3.98	5.97	7.96
1,137,284	9%	35.95	53.92	71.89
12,465,366	100%	\$ 356.08	\$ 534.12	\$ 712.17

City of Isle of Palms Municipal Accommodations Fee Collections

	FY14	FY15*	FY16	FY17	FY18	FY19	FY20
JUL	154,960	158,217	162,862	161,068	139,501	199,724	195,287
AUG	183,738	177,087	191,759	218,620	235,007	209,600	213,067
SEPT	137,686	151,064	150,212	136,141	157,274	152,535	152,561
OCT	60,449	84,113	90,691	77,500	75,353	79,534	75,506
NOV	55,789	58,716	61,918	57,777	64,256	63,444	
DEC	23,420	32,277	33,233	36,937	32,877	40,182	
JAN	28,793	24,860	25,309	28,217	28,859	25,836	
FEB	14,273	16,123	20,313	15,332	18,317	13,666	
MAR	14,492	17,406	16,918	20,485	21,562	19,983	
APR	39,874	102,242	51,082	51,166	53,213	53,685	
MAY	72,805	81,994	70,954	92,529	88,875	90,800	
JUNE	96,749	102,138	94,270	95,768	94,112	97,999	
Deduct last July	(154,960)	(158,217)	(162,862)	(161,068)	(139,501)	(199,724)	(195,287)
Add next July	158,217	162,862	161,068	139,501	199,724	195,287	
Total Fiscal Year	886,286	1,010,881	967,728	969,974	1,069,429	1,042,551	441,134
	Incr from FY13 9%	Incr from FY14 14%	Incr from FY15 -4%	Incr from FY16 0%	Incr from FY17 10%	Incr from FY18 -3%	Incr from FY19 -1%



* April 2015 includes \$52,496 one-time revenue related to settlement from online travel companies.

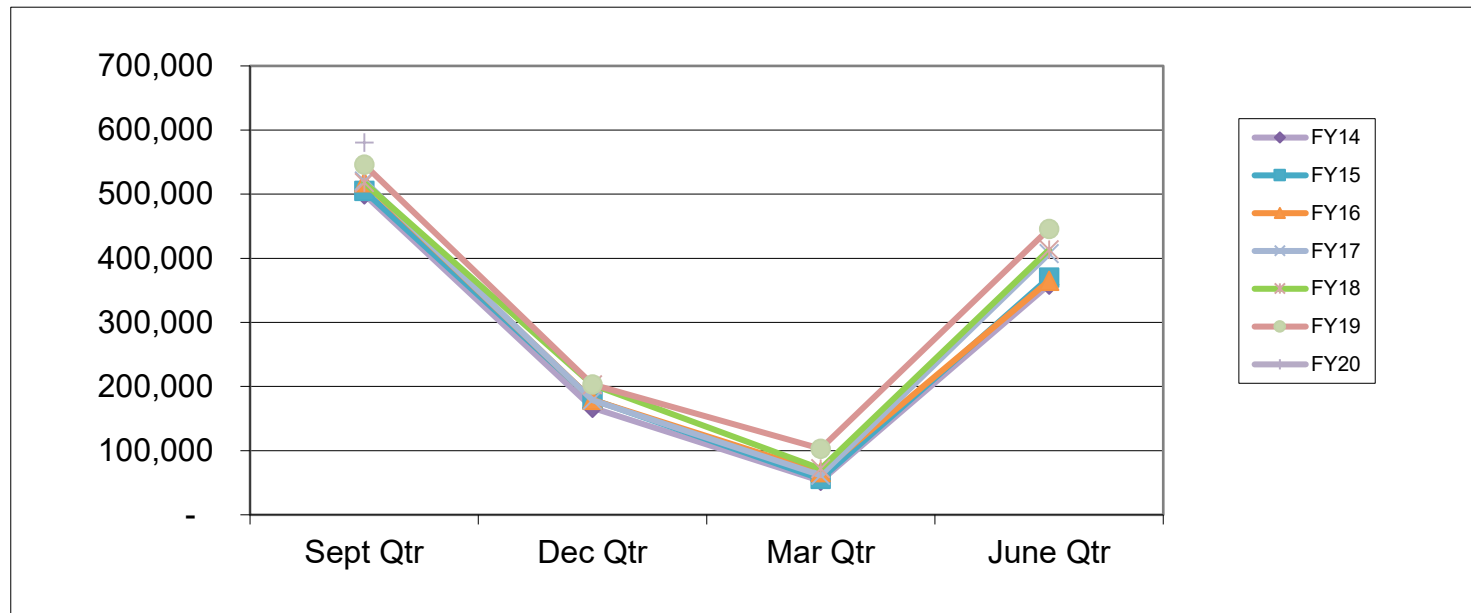
City of Isle of Palms State Accommodations Tax Collections

Tourism-Related Portion Only

	FY14	FY15	FY16	FY17	FY18	FY19	FY20
Sept Qtr	499,676	505,199	518,796	520,784	518,028	546,269	580,306
Dec Qtr	166,673	179,923	179,446	178,830	202,803	203,067	
Mar Qtr	52,817	55,913	66,294	61,586	71,773	103,097	
June Qtr	359,094	369,976	364,938	407,460	413,234	445,779	
Total Fiscal Yr	1,078,259	1,111,010	1,129,474	1,168,660	1,205,838	1,298,212	580,306

Check to G/L

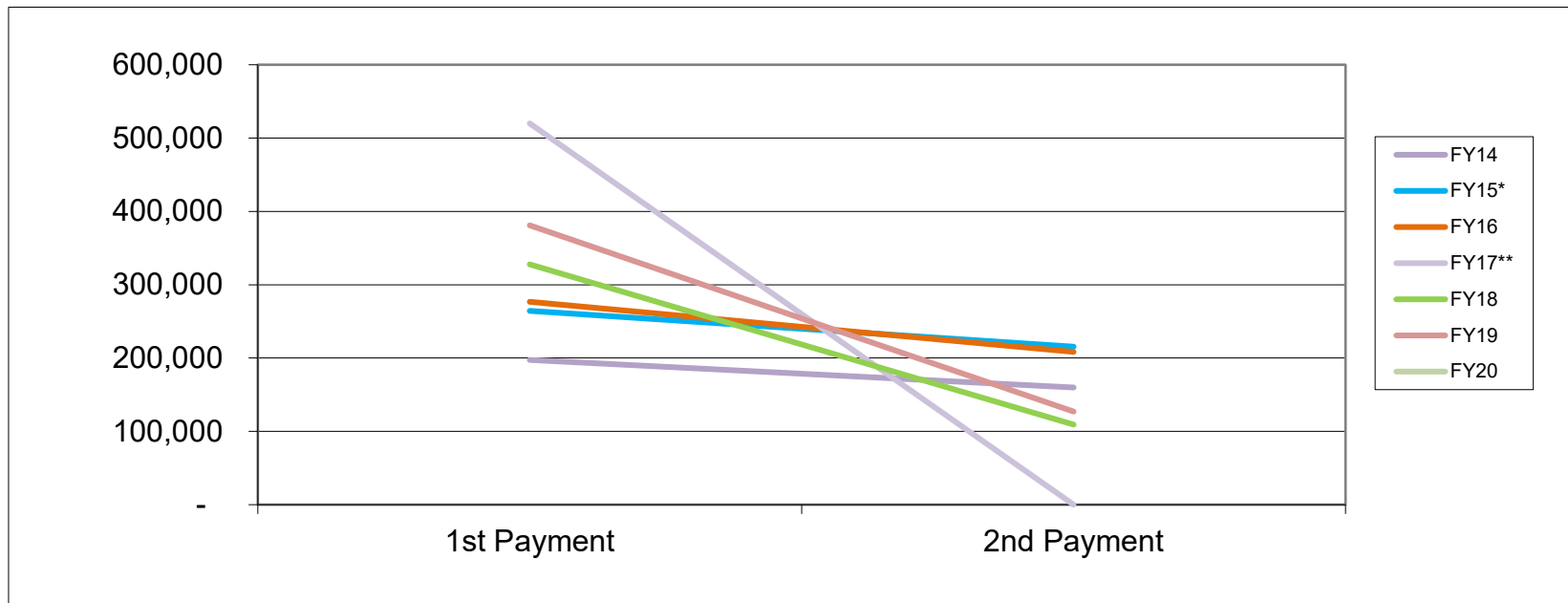
13.6% Incr from FY13	3.0% Incr from FY14	1.7% Incr from FY15	3.5% Incr from FY16	3.2% Incr from FY17	7.7% Incr from FY18	6.2% Incr from FY19
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City of Isle of Palms Revenue From Charleston County Accommodations Tax Pass-Through

1st Payment
2nd Payment
Total Fiscal Yr

FY14	FY15*	FY16	FY17**	FY18	FY19	FY20
197,400	264,335	276,704	520,000	327,750	381,000	370,500
159,791	215,479	208,390	-	109,250	127,000	
357,191	479,813	485,093	520,000	437,000	508,000	370,500
9%	34%	1%	7%	-16%	16%	-3%
Incr from FY13	Incr from FY14	Incr from FY15	Incr from FY16	Incr from FY17	Incr from FY18	Incr from FY19

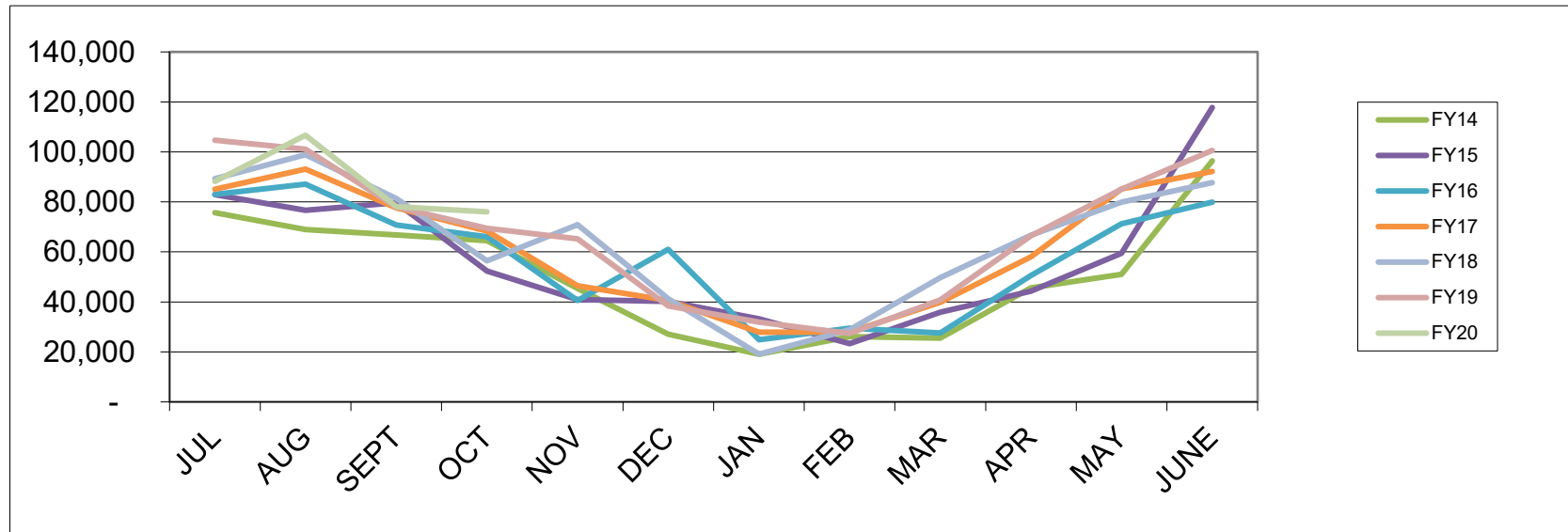


* Beginning in FY15, Charleston County increased its pass-through % from 20% to 25% of County Atax collected on the Isle of Palms.

** Only one payment received for all of FY17. County personnel indicate there will be a smaller 2nd payment in FY18.

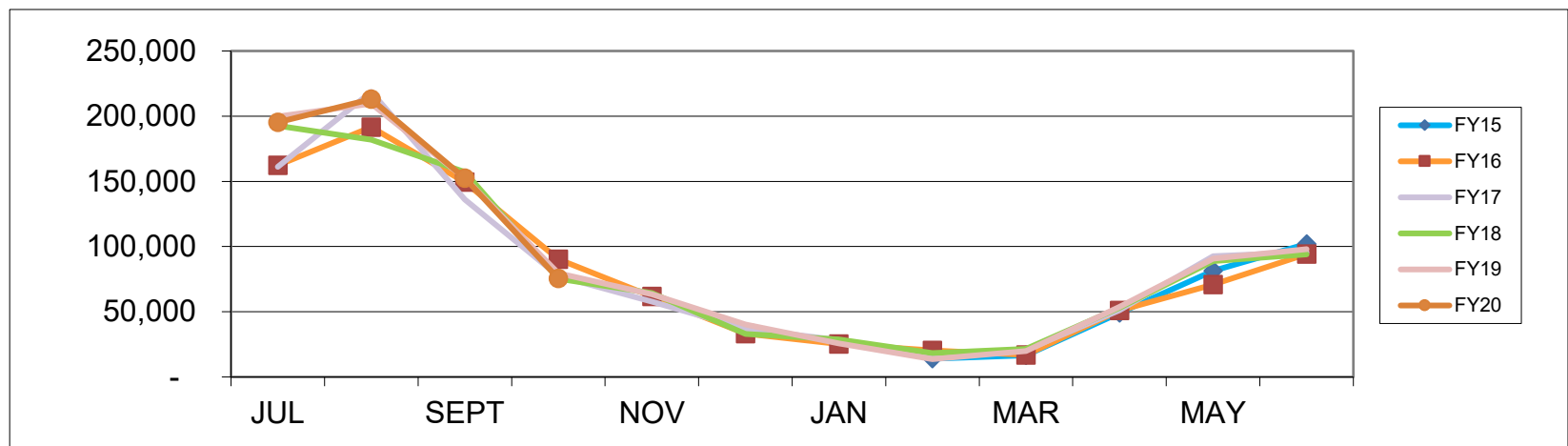
City of Isle of Palms Hospitality Tax Collections

	FY14	FY15	FY16	FY17	FY18	FY19	FY20
JUL	75,718	82,898	83,038	85,051	89,309	104,681	88,238
AUG	68,958	76,606	87,110	93,123	98,883	101,031	106,673
SEPT	66,779	79,619	70,725	77,619	81,373	78,014	78,129
OCT	64,513	52,308	66,113	68,348	56,439	69,394	76,033
NOV	45,325	40,949	40,576	46,488	70,905	65,210	
DEC	27,092	40,157	61,052	40,557	41,260	38,440	
JAN	19,057	33,166	24,864	27,883	19,085	31,905	
FEB	26,164	23,297	29,443	27,947	28,826	27,373	
MAR	25,564	35,894	27,586	39,785	49,744	40,741	
APR	45,637	44,335	50,531	57,961	66,633	66,425	
MAY	50,987	59,407	71,297	85,246	79,870	85,134	
JUNE	96,425	117,761	79,858	92,137	87,753	100,621	
Deduct last July	(75,718)	(82,898)	(83,038)	(85,051)	(89,309)	(104,681)	(88,238)
Add next July	82,898	83,038	85,051	89,309	104,681	88,238	-
Total Fiscal Year	619,399	686,537	694,206	746,402	785,452	792,527	260,835
	Incr fr FY14 11%	Incr fr FY15 1%	Incr fr FY16 8%	Incr fr FY17 5%	Incr fr FY18 1%	Incr fr FY19 -1%	



City of Isle of Palms Beach Preservation Fee

	FY15	FY16	FY17	FY18	FY19	FY20
JUL		162,228	161,068	192,666	199,724	195,287
AUG		191,610	218,620	181,842	209,600	213,067
SEPT		149,350	136,141	157,274	152,535	152,561
OCT		90,398	77,500	75,353	79,534	75,506
NOV		61,647	57,777	64,256	63,444	
DEC		33,233	36,937	32,877	40,182	
JAN		25,309	28,217	28,859	25,836	
FEB	13,997	20,313	15,332	18,317	13,666	
MAR	16,526	16,918	20,485	21,562	19,983	
APR	49,060	51,082	51,166	53,213	53,685	
MAY	81,384	70,954	92,529	88,875	90,800	
JUNE	102,031	94,270	95,768	94,112	97,999	
Deduct last July	-	(162,228)	(161,068)	(139,501)	(199,724)	(195,287)
Add next July	162,228	161,068	139,501	199,724	195,287	
Total Fiscal Year	425,226	966,152	969,974	1,069,429	1,042,551	441,134
			Incr from FY16 0%	Incr from FY17 10%	Incr from FY18 -3%	Incr from FY19 -1%



City of Isle of Palms
Drainage Phase 3

Contracts and Change Orders Received:

Thomas & Hutton	Surveying, Engineering & Design
Thomas & Hutton	Change Order #1 for Project Admin & Meetings
Thomas & Hutton	Tabby Lane project engineering & design
Thomas & Hutton	Change Order #2 Eng. for high impact projects in basin

Project Expenditures:

Invoice Date	Invoice #	Payee	Description of Work
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3/1/2019	146411	Thomas & Hutton Engineering	engineering services
5/1/2019	177576	Thomas & Hutton Engineering	engineering services
5/9/2019	178378	Thomas & Hutton Engineering	engineering services
5/21/2019	179304	Thomas & Hutton Engineering	engineering services - Outfall Study
5/31/2019	179305	Thomas & Hutton Engineering	engineering services - Tabby Lane Outfall improvement
6/30/2019	180267	Thomas & Hutton Engineering	engineering services - Outfall Study
6/30/2019	180269	Thomas & Hutton Engineering	engineering services - Tabby Lane Outfall improvement
6/30/2019	180268	Thomas & Hutton Engineering	outfall improvements - Internal Drainage Improvements
7/31/2019	181262	Thomas & Hutton Engineering	engineering services - Outfall Study
7/31/2019	181261	Thomas & Hutton Engineering	outfall improvements - Internal Drainage Improvements
8/31/2019		Thomas & Hutton Engineering	outfall improvements, CO#1, CO#2

Total paid

Remaining on contracts

FY19 Budget for design & engineering	400,000
Less Unspent FY19 Budget	(332,493)
FY20 Budget for remainder of design, engineering & permitting	200,000
Contracts/Change Orders	(144,600)
Budget Funds Remaining	122,907

Engineering & Design	Project Admin	Construction	Legal & Misc	Total
100,800				100,800
	13,000		-	13,000
7,500				7,500
23,300			-	23,300
131,600	13,000	-	-	144,600

2,174	1,680			3,854
27,588	1,120			28,708
24,845				24,845
11,060	1,120			12,180
4,351				4,351
18,100	1,695			19,795
871				871
5,750				5,750
8,295	2,858			11,153
11,500				11,500
8255.18	1,728			9,983
				-
				-
122,789	10,200	-	-	132,989
8,811	2,800	-	-	11,611

City of Isle of Palms

Public Safety Building Repair

FY19 Spending (Phase I)	95,267
FY20 Capital Project Fund Budget	2,300,000
FY20 Muni Atax Fund Budget	1,000,000
FY20 State Atax Fund Budget	1,000,000
FY21 Forecast Spending	1,900,000
Total Project Cost Estimate	6,295,267
Contracts/Change Orders	(490,914)
Estimated Contingency/Relocation	(943,222)
Budget Funds Remaining	4,861,131

Contracts and Change Orders Received:

Trident Construction Phase I	Investigative work & scope development
Trident Construction Phase II	Design and Engineering
Trident Construction Phase III	Construction estimate is \$4,861,000
City Contingency (15%), Relocation and Owners Representative	

Project Expenditures:

Invoice Date	Payee	Description of Work
5/8/19	Trident Construction	Phase I - Pay App #1
6/30/19	Trident Construction	Phase I - Pay App #2
10/30/19	Trident Construction	Phase II - Pay App #1
FY19	Williams Scotsman	rent on construction trailer
FY20	Williams Scotsman	rent on construction trailer
		Total paid
		Remaining on contracts

Investigation & Design	Construction Admin	Construction	City's Conting + Relocation + Owners Rep	Total
95,267				95,267
395,647				395,647
				-
			943,222	943,222
490,914	-	-	943,222	1,434,136
				86,420
				8,847
				131,049
			9,825	9,825
			2,612	2,612
				-
				-
				-
226,316	-	-	12,437	238,753
264,598	-	-	930,785	1,195,383

State Accommodations Tax Advisory Committee
Isle of Palms, South Carolina

Application for State Accommodations Tax Funds

Date Received: _____	Total Project Cost: _____
Total Accommodations Tax Funds Requested: _____	
Action Taken By Accom. Tax Advisory Committee:	Date Approved _____ Denied _____
Action Taken By Ways & Means Committee:	Date Approved _____ Denied _____
Action Taken By City Council:	Date Approved _____ Denied _____
Documentation required for payment: ___line item budget, ___invoices, ___Financial Report	

For Office Use Only

A. Project Name: IOP Turtle Hatchling Scavenger Hunt _____

B. Applicant Organization: City of Isle of Palms, IOP Exchange Club, Turtle Team

1. Mailing Address: _____

Telephone: _____ Fax: _____

2. Project Director: Kitty Riley/Mary Pringle

Telephone: _____ Fax _____

3. Description of Organization, Its Goals and Objectives: (see attached pages)

C. Description and Location of Project/Event: (see attached pages)

☐ Single Event?

☒ Ongoing Event/Annual Need?

1. Date(s): of Event: ___ or Project Start: **March 2020** Completion: **Ongoing**

2. Impact on Tourism: What percentage of persons benefitting from this project are tourists (50 _____ %) vs. Isle of Palms residents (50 _____ %).

*Source of tourist data: Website hits, completed pamphlets returned
(website hits, surveys, ticket sale information, etc.)

3. If this application is for an ongoing event, what is the percentage increase/decrease in tourist attendance versus the past year's event?

*Source of tourist data _____
(website hits, surveys, ticket sale information, etc.)

D. Funding: Sources of Income for This Event or Project

1. Sponsorships or Fundraising: Amount \$ _____ From _____

2. Entry Fees : Amount \$ _____ From _____

3. Donations: Amount \$ _____ From _____

4. Accommodations Tax Funds Request: Amount \$ 6,000 _____

Date(s) Required: January 2020 Lump Sum: _____ Installments _____

5. Other:

6. Total Budget: \$6,000 first yr est

E. Financial Analysis

Please Provide Line Item Budget for Event or Project

Date for Submission to Isle Of Palms Treasurer of Financial Report for Event or Project: January 15th, 2020 _____

If awarded, funds are requested as follows:

(1) Lump Sum(s): \$6,000 est _____ on January 31st, 2020 (date),
\$ _____ on _____ (date),
\$ _____ on _____ (date).

(2) Payment of Invoices as submitted to City Staff. Invoices should be submitted two weeks prior to due date.

IOP Turtle Hatchling Scavenger Hunt

Purpose:

Education of children/public by promoting the roles turtles play on our island and ecology. Increase awareness and excitement of the turtle visitors to our shores.

Method:

Establish a scavenger hunt based upon clues to locate the hatchling plaques that contain educational information.

Program:

Establish 6 bronze turtle hatchlings w/plaques placed at front beach with fun turtle educational descriptions (see example included). The scavenger hunt information would be included on brochures, possibly IOP and Exchange Club Websites. The brochures would be available at local businesses, City Hall, etc. Reward could be IOP T-shirt. Estimated cost = \$6,000

Sponsors:

Partnership between the City of Isle of Palms; IOP Exchange Club, Turtle Team

Roles:

City funds, maintains and installs plaques; plaques will be located at 6 locations along Front Beach (Flagpole, Turtle Sculpture, Sidewalk adjacent to County Park, Public Safety Building, VFW, Public Restrooms/Hydration Station/Showers)

Exchange Club writes clues (See following page) & helps facilitate production and installation of plaques

Turtle Team provides educational descriptions that would go on plaques (see following page)

All promote via pamphlets, web site, social media and area businesses.

Timeline:

Install prior to 2020 Beach Season (early Spring)

Vision:

If scavenger becomes popular, there is an opportunity to grow “nests” to other areas on the island, such as Wild Dunes, Recreation Center, and the IOP Marina.

Potential Resources:

City of Isle of Palms, SC Aquarium, Front Beach Businesses & Realtors, Wild Dunes, Rec, Marina, CCPRC, others

Hatchling Hunt Clues (draft)

1. You'll find Mary near the flagpole, she's very patriotic. She's also an egg laying gal.
CLUE: Look for the stars & Stripes
2. Jo is across the street to cool down from the heat she may be resting near a bench or getting water.
CLUE: LOOK BOTH WAYS! You'll see her BIG brother and sister.
3. Babs is hoping to make it to the ocean. She will be near a beach path.
CLUE: Do you know where the County Park is?
4. Linda's very safe and obeys all the rules. She's going to be a survivor.
CLUE: Public Safety building would be a safe place to hide.
5. Jammer is getting a little warm and wants to head out to sea.
CLUE: Think two Scopes by two guys.
6. Ruth is following Jammer back to the beach with a stop.
CLUE: LOOK BOTH WAYS! She supports our Veterans.

Hatchling Hunt Educational Descriptions (draft)

1. **EGGS LAID** by mother loggerhead and buried, average 120 eggs, each turtle does this 4-6 times a season every 2 weeks.
2. **INCUBATE** under the sand which averages 48-60 days with heat from the sun required to hatch.
3. **HATCH & DIG OUT OF THE NEST** and run to the ocean trying to quickly avoid predators such as ghost crabs on the beach or fish in the ocean.
4. **SWIM** as fast as possible out to the Gulf Stream to hide in the floating Sargassum seaweed. Only one in one thousand will survive adulthood.
5. **DRIFT** with the ocean current all the way across the Atlantic Ocean and then return when about 15 years old to the South Carolina Coast.
6. **GROW UP** and begin to lay eggs in South Carolina. After laying hundreds of eggs in the summer, adults migrate south to spend the winter since they are cold-blooded reptiles and need warm water.



Isle of Palms Police Department

RESERVE OFFICER PROGRAM

Kevin Cornett, Chief of Police

30 jc Long Blvd
Isle of Palms, SC 29451

843-886-6522
kcornett@iop.net

IOPPD Reserve Officer Program Proposal

Purpose

There has been a request to initiate a reserve officer program within the police department. The request came after a certified class 1 police officer, FTO C. Sanders, resigned for personal reasons that led him to pursue a career path outside of law enforcement. That employee still has the desire to serve the citizens, businesses and visitors of Isle of Palms, SC. For the purpose of this white paper information was obtained from the South Carolina Reserve Officer Training Program Administrative Guide.

OVERVIEW

Implementing a reserve officer program is a cost effective method to supply additional resources during times when call volume seems to be the highest. By appointing FTO Sanders as a reserve officer the only cost to the City is for bonding and workers compensation, while we maintain a police officer that has been well trained in many areas of law enforcement to include crime scene investigations. FTO Sanders will bring his drive to the new role and would work hard to protect the City of Isle of Palms. He clearly has a dedication to the job of a police officer.

BENEFITS

A reserve police officer must be certified by a law enforcement agency and approved through the SC Criminal Justice Academy. The benefit of starting this program with a currently class 1 certified officer is that there is no need to re-certify that officer to become a reserve officer. His class 1 certification is proof that he has obtained all of the needed training to serve as a reserve officer.

Reserve officers are required maintain 20 hours a month (60 hours a quarter) of service time in order to maintain his certification as a reserve officer. This means that for no additional cost, we will have at least 20 hours of police coverage from a certified reserve officer each month. This increases the visibility of law enforcement personnel during those times.

There is little additional funding associated with starting this program and appointing FTO Sanders as the reserve officer. Reserve officers cannot be paid and must serve as a volunteer. We have already purchased uniforms and a vest that have been specifically fitted for FTO Sanders. Therefore, the City will not need to purchase uniforms and we will not have to destroy the uniforms previously purchased by the City of Isle of Palms.

STARTING THE PROGRAM

In order to be an authorized agency the police department will complete an application to be submitted to the SC Criminal Justice Academy. Once the department is approved the agency head will complete the application every July, when an agency head changes, when a reserve officer is removed, or when a reserve officer is added. Per SC Code of Law 23-28-20, a department may not decrease the number of full-time police officers because of the institution or expansion of a reserve officer program.

After becoming an approved reserve officer agency, the proper Personnel Change in Status form must be completed hiring FTO Sanders as a reserve officer. Once approved through the SC Criminal Justice Academy, FTO Sanders will be able to work as long as there is a Class 1 certified police officer working.

COSTS

The only cost to the City of Isle of Palms is to ensure that the reserve officer is bonded for an amount of the City's choosing which may not be less than \$1,500. This cost can be anywhere from 1% to 15% of the bond. The other costs associated with the reserve officer program is in the area of providing worker's compensation benefits as the agency does for other full-time officers.

SCHEDULE

Upon approval from City Administrator the application to be an authorized reserve officer agency will be completed and submitted to the SC Criminal Justice Academy. There is typically a seven to fourteen day wait period before approval is completed. Once approved FTO Sanders will schedule a date to return in the capacity of a reserve officer (he is currently scheduled to be out of town for training with his new job for about a month). Prior to FTO Sanders returning as a reserve officer, a PCS will be submitted to the SC Criminal Justice Academy showing that FTO Sanders is transferring from class 1 to reserve officer. It is anticipated that this would all be complete within two to three months at the latest.



Charleston County Greenbelt Program

City of Isle of Palms, South Carolina

What can the funds be used for?

- Greenbelt funds can be used to acquire interest in land for conservation, wetlands protection, historic and cultural preservation, parks, greenways and trails, and waterway access.
- Beach municipalities may use greenbelt funds for minor improvements that provide public access to land the City currently owns.
 - Boardwalks
 - Foot bridges
 - Unpaved Trails
 - Unpaved roadways
 - Unpaved small parking areas

Isle of Palms Funding Allocation

Population (US 2010 Census)	Percent of Population	Balance from 1 st Allocation	FY19 Allocation	FY20 Allocation	Obligated	Balance Available
4,133	1.30%	-----	\$103,613	\$45,978	-----	\$149,592



Proposed
Project:
ADA Compliant
Beach Walkover
& Observation
Deck at 42nd
Avenue

- The combination of a high primary dune, OCRM's requirement that boardwalks be 24" above the dune and that boardwalks not extend beyond the seaward toe of the primary dune, and ADA's requirements that a ramp not exceed a slope of descending 30" over a 35' distance (12:1 slope, 30' maximum length, 5' resting area) creates a design challenge to construct ADA compliant boardwalks on many of the City's beach paths.
- The beach access at 42nd Avenue is unique and may be one of the City's only opportunities to construct a relatively flat boardwalk that would provide ADA compliant access for people with physical challenges.

Beach Boardwalk Design Challenges

Benefits

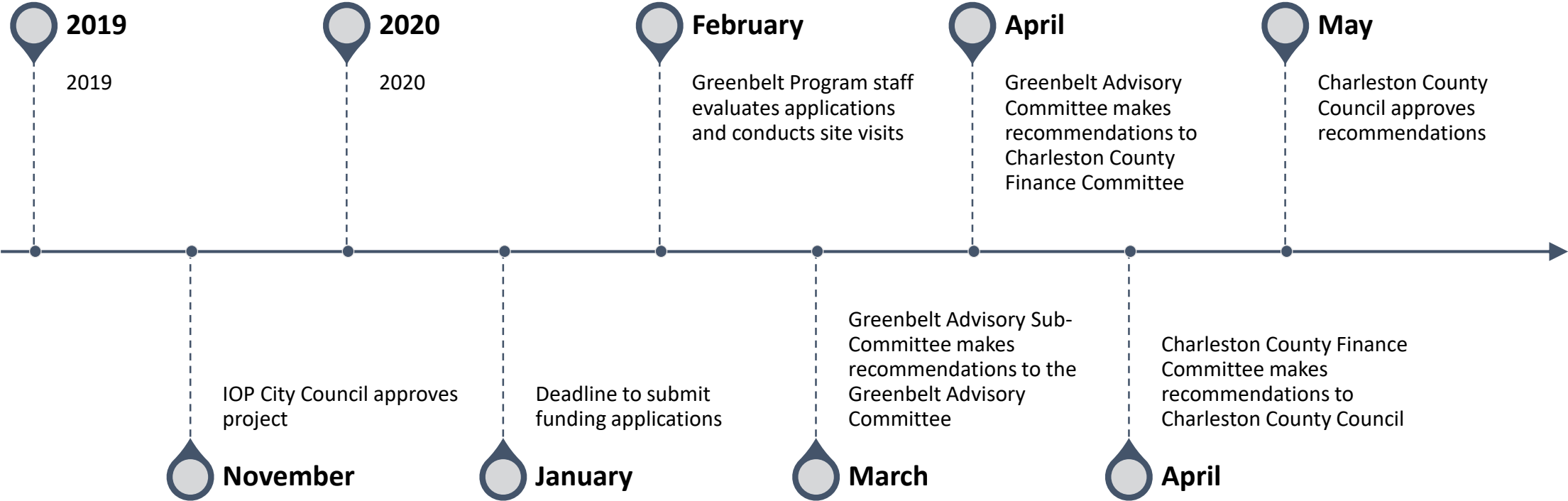
- Enhance public beach access to the beach and the Atlantic Ocean for a variety of recreational activities
- Provide ADA accessibility to the beach for people with physical challenges
- ≈ 300' long, flat beach access path & 60' right-of-way
- Existing 10 residential parking spaces
- Designated handicap parking space (There is an opportunity to work with SCDOT to increase number of handicap spaces)
- Beach path is wide enough to accommodate a new boardwalk and observation deck while maintaining an emergency vehicle access path



Estimated Costs

- Design & Permitting: ≈\$10 - \$15K
 - Design and permitting is not eligible through the Greenbelt program; however, City may cover these costs with Beach Preservation Funds.
- Construction:
 - Ipe wood: ≈ \$600 - \$700 per linear foot
 - 300' boardwalk: ≈ \$180,000 - \$210,000
 - Treated wood: ≈ \$250-\$300 per linear foot
 - 300' boardwalk = ≈ \$75,000 - \$90,000
- Ongoing Maintenance

Timeline



CITY OF ISLE OF PALMS

South Carolina



DEPARTMENT OF BUILDING, PLANNING AND LICENSING

MEMORANDUM

TO: Desirée Fragoso, City Administrator

FROM: Douglas Kerr, Director of Building and Planning *Douglas Kerr*

RE: RFP 2019.05- owner's representative for the rehabilitation of the Public Safety Building

DATE: November 14, 2019

In accordance with the City's Procurement Code, proposals were solicited for construction management services to help the City ensure the successful rehabilitation of the Public Safety Building. The chosen firm would be expected to review plans, inspect work as it progresses, report deficiencies and provide guidance to the City (see attached request for proposals). There were four proposals submitted and all submittals complied with the requirements of the City's request (see the attached bid tabulation).

Because this project involves opening walls with water and air intrusion issues, there is a high potential for unforeseen conditions to be exposed. This uncertainty creates challenges for firms proposing a cost for their services. To align the workload expectations, the City worked with the contractor and architect to develop a scope that included a set number of work hours of 244 hours for the base proposal amount. This number of hours assumes that the chosen representative would work five hours per week during construction. If unforeseen problems are uncovered, additional cost will be based on a predetermined hourly rate through the change order process.

After receiving the proposals, members of the City staff met with each of the respondents to discuss the challenges of the project and determine which firm would be the most likely to ensure a successful rehabilitation. Based on the responses and interviews of each firm, the staff recommends that the City enter into an agreement with the **Insight Group, LLC for a base amount of \$26,840**. Not only was Insight's base amount the lowest of the proposals, but they have a great track record of success with renovations and a history of working with Trident in a successful team approach.

Request for Proposals (RFP) 2019 – 05
Owner's Representative/Construction Project Management Services
for the Rehabilitation of the Public Safety Building
City of Isle of Palms, South Carolina

In compliance with the City's Procurement Ordinance, the City of Isle of Palms is requesting proposals from qualified firms to act as the City's representative for an upcoming construction project at the Public Safety Building, located at 30 J.C. Long Boulevard.

The City does not have a professional construction manager on staff and is therefore seeking proposals from qualified firms to provide guidance, expertise and review plans, specifications and work on behalf of the City to ensure a successful construction project and an improved Public Safety Building. A separate agreement will be sought for Chapter 17 Special Inspections.

Numerous deficiencies have been identified at the Public Safety Building including water intrusion, indoor air quality and general workmanship issues. The rehabilitation project is expected to include the removal and recladding of the entire exterior cladding/roofing of the building (not including windows), limited plumbing work, limited fire sprinkler work, the installation of conditioned outdoor air handlers and associated ductwork, replacement of the existing variable refrigerant flow (VRF) air conditioning system, replacement of various air handling units and condensing units, replacement of existing light fixtures and lighting controls, replacement of the fire alarm system, replacement of the existing emergency generator, miscellaneous maintenance items and miscellaneous replacement of interior finishes (as necessary for the completion of other work).

Trident Construction and Coast Architects, the City's contracted design-build team, is currently working to develop final construction documents that should be available by January 2020. Construction is expected to begin in March 2020 and the budget for the entire construction project is \$5,256,779 which includes contingency funds.

I. Scope of Work

A. Prior to work starting on the building, the chosen firm will be expected to review drawings, specifications, and submittals in order to become knowledgeable with the project.

B. Prior to work starting on the building, the chosen firm will be expected to attend preconstruction/project kick off meeting – assume four (4) hours.

C. During the construction phase, the chosen firm will be expected to conduct weekly inspections and provide deficiency reports that track any conformance issues until items are resolved/corrected by Contractor. Reports are to be issued and delivered to the City Administrator within twenty-four (24) hours of the site visit. Weekly visits should be assumed to be limited to four (4) hours per each visit for a total of one hundred ninety-two (192) hours.

D. Inspections will entail reviewing the work that has been put in to place.

E. The total project duration is expected to be eleven (11) months or forty-eight (48) weeks.

F. Additional unplanned visits may be necessary. An allowance of forty-eight (48) hours should be included.

G. The hours of work described above will be used to determine the expected cost of the work to be done under this request. If additional hours are required, a change order will be necessary, and the amount of the change shall be based on the additional hours expected to be worked and the billable rates included on the cost proposal form.

H. The chosen firm shall provide a final written report documenting all inspections that have been completed and that all non-conformance issues have been addressed and documented as being resolved.

II. Payments

All payments made pursuant to this RFP will be paid on an hourly basis utilizing pre-approved billable rates for time worked and adequately documented regardless of the assumptions of time provided for each task. The agreement that will be entered into pursuant to this request will include a not to exceed amount. It is expected that the chosen firm will manage the hours worked to complete all work in the scope of services and not exceed total agreed upon price, regardless of the assumptions of time provided for each task. If additional work becomes necessary because of a change in scope or an issue that could not have been anticipated and the work cannot be completed within the not to exceed amount, the chosen firm should alert the City to this issue prior to conducting the work and a change order should be considered. The amount paid for any additional work will be paid utilizing the preapproved billable rates.

III. Proposal Process

Proposals should be submitted to the following:

Desirée Fragoso
City Administrator
City of Isle of Palms, 1207 Palm Boulevard
Post Office Box 508
Isle of Palms, South Carolina 29451

Deadline for Submissions: The deadline for submission is 10:00 a.m., Friday, October 25, 2019. Proposals will be received at 1207 Palm Boulevard, Isle of Palms, South Carolina 29451 in a sealed envelope. Sealed envelopes must be clearly marked “(RFP) 2019 – 05 Owner’s Representative/ Construction Project Management Services for the Rehabilitation of the Public Safety Building” and include one (1) hard copy and one (1) electronic copy saved to a USB flash drive.

It will be the responsibility of the proposers to verify receipt by the City. Proposals may be delivered by hand or by mail, but no proposal shall be considered which is not actually received by the City at the place, date and time appointed by the City and the City shall not be responsible for any failure, misdirection, delay or error resulting from the selection by any proposer of any means of delivery. All proposals submitted shall include a current e-mail address.

Proprietary and/or Confidential Information: Your proposal is a public document under the South Carolina Freedom of Information Act (FOIA), except as to information that may be treated as confidential as an exception to disclosure under the FOIA. If you cannot agree to this standard, please do not submit your proposal. All information that is to be treated as confidential and/or proprietary must be CLEARLY identified, and each page containing confidential and/or proprietary information, in whole or in part, must be stamped and/or denoted as CONFIDENTIAL, in bold, in a font of at least 12-point type, in the upper right-hand corner of the page. All information not so denoted and identified will be subject to disclosure by the City.

Proposers acknowledge and agree that the City will not be liable for any costs, expenses, losses, damages (including damages for loss of anticipated profit) or liabilities incurred by the respondent or any member of the respondent's organization as a result of, or arising out of, submitting a proposal, negotiating changes, or due to the City's acceptance or non-acceptance of the proposal or the rejection of any and all proposals. Proposers are responsible for submission of accurate, adequate and clear descriptions of the information requests. Neither issuance of the RFP, preparation and submission of a response, nor the subsequent receipt and evaluation of any response by the City of Isle of Palms will commit the City to award a contract to any respondent even if all the requirements in the RFP have been met.

Proposers must have or be able to procure an Isle of Palms Business License.

IV. Submission Requirements

Each proposal shall include the following information as applicable to be considered complete:

- A. Consulting firm's background, office locations, size, capabilities.
- B. Project experience with construction management.
- C. A statement describing why this firm is most qualified to perform this work. Demonstrate the firm's qualifications, competence and capacity.
- D. Detailed cost proposal on the included form. Include a fee schedule including hourly rates for all personnel, subcontractors, and reimbursables. Subcontractors must be explicitly listed.
- E. Oath of Non-Collusion signed by a principal of the firm or an officer authorized to bind the corporation.
- F. Indicate and list any pending legal actions.

IV. Proposal Evaluation Criteria

The primary intent with regards to the procurement of these services is to obtain what the City would consider to be the best package of product and service. This includes overall proposal suitability, price competitiveness, quality and timeliness of previous work performed.

Respondents will further be evaluated on their experience, qualifications, and references. The City of Isle of Palms reserves the right to reject, in whole or in part, any proposal submitted which, in the judgment of the City, would not be in its best interest. The City also reserves the right to waive minor deficiencies or reject all proposals.

City of Isle of Palms, South Carolina
Official Sealed Proposal Opening
RFP 2019-05 Owner's Representative/ Construction Project Management Services
for the Rehabilitation of the Public Safety Building

Present: Desirée Fragoso, City Administrator
 Douglas Kerr, Director of Building, Planning and Zoning

Administrator Fragoso announced the sealed proposal opening of the RFP 2019-05 Owner's Representative/ Construction Project Management Services for the Rehabilitation of the Public Safety Building. She stated that the Request for Proposals was advertised in accordance with the Procurement Code.

Proposals:	Total Lump Sum:
1. Brownstone 4055 Faber Place Drive Suite 202 North Charleston, SC	\$36,600
2. Insight Group, LLC 3359 Meeting Street North Charleston, SC	\$26, 840
3. Cumming Management Group, Inc. 3820 Faber Place Drive Suite 600 Charleston, SC	\$30,500
4. Terracon Consultants, Inc. 1450 Fifth Street West North Charleston, SC	\$32,940

Proposals will be reviewed for accuracy and compliance with the specifications as defined in the RFP. Staff will make a recommendation for approval to the Real Property Committee at their scheduled meeting on November 6, 2019.

October 25, 2019



City of Isle of Palms
1207 Palm Boulevard
PO Box 508
Isle of Palms, SC, 29451

Attn: Ms. Desiree Fragoso
City Administrator

Re: Proposal for Owner's Representative/Construction Project
Management Services
Rehabilitation of the Public Safety Building
City of Isle of Palms, South Carolina
Insight Group Number: 19-0281

Dear Ms. Fragoso:

Insight Group (IG) looks forward to our partnership with the City of Isle of Palms for the upcoming rehabilitation of the Public Safety Building. Our engineers, inspectors and professional staff have worked on similar projects across the lowcountry and would like to assist the City of Isle of Palms with this rehabilitation. We would assign one of our most experienced staff members, Mr. James Frink, who has a long history of providing Owners Representative & Construction Management Services. We are a local Small Business Entity and are focused on providing the highest level of service to the City of Isle of Palms.

The following submittal has been organized based on the published evaluation criteria and contains information responding to the requirements in the RFQ. We appreciate the opportunity to provide this proposal and look forward to working with you.

Sincerely,
INSIGHT GROUP, LLC

A handwritten signature in black ink, appearing to read 'Matt Silveston'.

Matt Silveston, P.E.
Partner

A handwritten signature in black ink, appearing to read 'William Reg Christopher'.

William. Reg Christopher, P.E.
Partner



Proposal for City of Isle of Palms, SC

Owner's Representative/Construction Project Management Services
Public Safety Building

General Information and Firm Profile

Insight Group, LLC was established in September 2018 by Reg Christopher, P.E. After 10+ years of serving within the corporate structure of a national engineering firm, he formed the company to provide more personal service to local clients.

The appeal of this simple concept spurred the firm to quickly grow with key engineering, construction management and inspection staff that had worked together for 15 to 20 years. Our individual experience in the lowcountry area dates back to the early 1990's and our staff has been involved with many of the marquee projects around Charleston such as the Ravenel Bridge or the current construction at the Hugh Leatherman Terminal.

Our staff has rapidly grown from 1 to 40 employees in a year and we continue to expand. We have one

office which is located at 3359 Meeting Street, Suite 101, North Charleston, SC. From this office, we provide Construction Management, Construction Inspections, Chapter 1&17 Inspections, Material Testing, Geotechnical Engineering and Environmental Engineering Services. Insight Group, LLC, does not have any pending legal actions.

The City of the Isle of Palms will benefit from the experienced staff Insight Group has to offer. The bulk of our experience has been on complex larger projects with the South Carolina Ports Authority, Charleston County School District and local developers. We also regularly work on smaller renovations such as the Public Safety Building at the Isle of Palms.



Project Experience

The engineers and key staff at Insight Group have been working on a wide variety of projects around the lowcountry for over 20 years. Several projects are featured below.

01 DRUM ISLAND Environmental Restoration CHARLESTON, SC

Construction Project Management, Contract Amount: \$99,000

Mark Messersmith 843-991-2242

SCPA

200 Ports Authority Drive, Mt Pleasant, SC 29464

The Port has used Drum Island for dredge disposal for decades. As part of the Port's mitigation plan, 22 acres of tidal marsh along the southern tip of Drum Island was recently restored and a tidal creek channel has been cut. Insight Group assisted the Port by providing Construction Project Management of this restoration project. Working with the Port's Project Manager, Insight Group oversaw the construction activities and challenges. Our duties consist of running the weekly progress meetings, documenting progress, reviewing pay applications and change orders as well as other tasks on behalf of the Port.

02 INLAND PORT, DILLON, SC

Site Supervision, Contract Amount: \$749,000

Butch Weber 843-290-7538, SCPA

200 Ports Authority Drive, Mt Pleasant, SC 29464

Once the Inland Port project was awarded to the contractor Ragnar Benson, the South Carolina Ports Authority requested that Insight Group mobilize to Dillon on a full time basis to be the Owners Representative. These duties consisted of providing Site Supervision and Quality Assurance. This included weekly progress meetings, submittal review, document management, pay applications, material testing, site monitoring and other tasks. Insight Group worked closely with the Port staff to communicate the progress on site and discuss issues as they arose.

03

**COLUMBUS STREET
RESURFACING
CHARLESTON, SC**

Site Supervision, Approximate

Contract Amount: \$80,000

Bob Mitchell 843-296-8635

SCPA, 200 Ports Authority Drive

Mt Pleasant, SC 29464

Site Supervision 100% Complete

While working for Terracon, David Ray provided site supervision services for the re-surfacing of approximately 40 acres at the Columbus Street Terminal. The project not only re-surfaced, but also raised the terminal elevation and installed drainage improvements and was conducted while the terminal was fully operational. During this project, David scheduled material testing and inspections of the earthwork, concrete and asphalt paving. He reviewed the pay applications submitted and material submittals by Banks Construction. He ran the weekly progress meetings and maintained the ProjectSolve database. The project began in 2016 and concluded in October 2017. David Ray will be assigned to the Ports On-Call contract.

Qualifications

Insight Group, LLC has a total staff of 40 at the time of this submission. We are still in the process of increasing staffing levels and project to have a local staff of 60 by the end of 2020. Your project will be managed by Mr. James Frink and he will be supported by Mr. David Ray, E.I.T. and Insight Group's local engineers and inspectors.



James Frink | Owners Representative

Insight Group, LLC
21 years of experience

The City of Isle of Palms will benefit from Mr. Frink's organizational and management skills. Mr. Frink is accustomed to being the Owner's Representative and providing project management services on construction projects. He has served as the Plan Reviewer and Building Inspector for the Town of Mt Pleasant from 1998 to 2005 and a similar role for the City of Hanahan from 2009 to 2011. While at Insight Group, Mr. Frink has been the owners representative and

Chapter 1&17 Inspector on several school renovation projects and new construction. These projects have ranged from \$5M at Frierson Elementary renovations to \$22.5M at the District 4 Stadium. He was the owners representative and Lead Special Inspector on behalf of the South Carolina State Ports Authority for their new headquarters building.



David Ray, EIT | Partner 5

Insight Group, LLC
10 total years of experience

David has over 10 years of experience in the Site Supervision and Quality Assurance fields. He has worked on SCPA projects since the Columbus Street Terminal re-surfacing with Banks Construction. On that project, he provided Site Supervision on an 18-month project. During this time he scheduled inspections and testing of the soils, concrete and asphalt paving. He reviewed the submittals, pay applications and ran the weekly progress meetings. He interacted directly with Bob Mitchell during the project to keep the Port informed of progress.

He later worked on the Hugh Leatherman Terminal on the Site Preparation package since 2014. For this project, he scheduled testing and inspections of the stone fill place-

ment. He has provided geotechnical and construction materials inspection reports, specifically in field and laboratory evaluation of soils, concrete and asphalt. His specialized geotechnical and construction engineering experience includes the planning, coordination and implementation of

geotechnical instrumentation and specialized designs. His specialized materials testing experience includes modification of subgrade soils via chemical or cement modification; planning, coordination and implementation of soil and material Quality Control (QC) or Quality Assurance (QA) programs for structures, bridges and roadway projects.

Mr. Ray is a certified Chapter 1 & 17 special inspector with the

International Code Council for structural masonry, reinforced concrete, soils, seismic resistance and commercial building inspection. His project experience includes roadways, ports, schools and commercial buildings. Additionally, he has served as a Foundation Preparation Inspector, RCC Inspector, Site Engineer, and Quality Assurance Manager on Projects including anchoring projects, RCC dams and large earthwork projects. Additionally, he has provided construction inspection oversight, technical support, rock anchor installation oversight, and assisted in preparing proposals and design for various construction projects.



Statement of Litigation

Insight Group, LLC does not have any pending litigation. Insight Group or its officers have never been involved with any legal issues with the South Carolina Ports Authority.

Cost of Services

The cost of our services will be based on the unit rates provided in the Appendix.



Appendix

Fee Schedule

Oath of Non-Collusion

COST PROPOSAL FORM

PROPOSAL OF: Insight Group, LLC
(Contractor)

PROPOSAL TO: City of Isle of Palms, SC
(Owner)

PROJECT NAME: Rehabilitation of the Public Safety Building

PROJECT NUMBER: 2019-05 PROPOSAL DATE: October 25, 2019

BASE PROPOSAL AGREEMENT

The undersigned, having examined all the Bidding Documents, including
RFP 2019-05 and
acknowledging all Addendum(a) as follows:

shall execute the entire Work in the Bidding Documents described as in the Scope of Work for the following amount:

Preconstruction meeting: 4 hours at \$ 110 / per hour = \$ 440

Weekly inspections: 192 hours at \$ 110 / per hour = \$ 21,120

Additional visits: 48 hours at \$ 110 / per hour = \$ 5,280

TOTAL AMOUNT OF PROPOSAL = \$ 26,840

Dollars

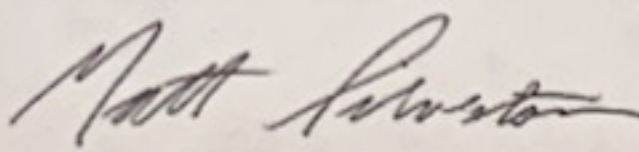
which sum is hereafter called the PROPOSED COST TO NOT BE EXCEEDED.

The undersigned acknowledges the receipt of the following addenda and confirms that the PROPOSAL as submitted reflects appropriate price responses:

AUTHORIZATION

Insight Group, LLC
(Type or Print Name of Contractor)

3359 Meeting Street, Suite 101, North Charleston, SC 29405
(Type or Print Address)


(Signature of Authorized Agent)



Insight Group Unit Rates 25-Oct-19

Constuction Materials Testing and Inspection Service

	Unit	Rate
Inspector	per hour	\$48.00
Senior Inspector	per hour	\$60.00
Structural Steel IBC Chapter 17 Special Inspector	per hour	\$80.00
IBC Chapter 1 Inspector	per hour	\$85.00
CEPSCI Erosion Control Inspections	per visit	\$125.00

Engineering and Project Management Services

Construction Professional	per hour	\$85.00
Senior Construction Consultant	per hour	\$110.00
Geotechnical / Environmental Professional	per hour	\$95.00
Senior Geotechnical / Environmental Consultant	per hour	\$140.00

Soil

Consolidated, Undrained Triaxial Shear w/ PP, 3 Points	per test	\$950.00
Consolidated, Undrained Triaxial Shear w/ PP, Single Point	per test	\$500.00
Unconsolidated, Undrained Triaxial Shear, Single Point	per test	\$350.00
Direct Shear	per test	\$375.00
One Dimensional Consolidation, 12 loads	per test	\$600.00
One Dimensional Consolidation, additional loads	per test	\$50.00
Unconfined Compression	per test	\$135.00
Soil Specific Gravity	per test	\$95.00
Permeability, Cohesive, Undisturbed	per test	\$250.00
Permeability, Cohesive, Remolded	per test	\$275.00
Permeability, Granular	per test	\$175.00
Standard Proctor Moisture-Density Relationship	per test	\$100.00
Modified Proctor Moisture-Density Relationship	per test	\$120.00
Modified Proctor Moisture-Density Relationship, Base Course	per test	\$140.00
CBR, 3 points	per test	\$275.00
Atterberg Limits	per test	\$80.00
#200 Wash	per test	\$48.00
Grainsize Analysis with #200 Wash	per test	\$75.00
Grainsize Analysis with #200 Wash and Hydrometer	per test	\$95.00
Moisture Content	per test	\$12.00
Organic Content	per test	\$50.00
Soil Resistivity	per test	\$35.00
pH	per test	\$35.00
Soil-Cement Mix Design	per test	\$550.00
Reclamation Mix Design	per test	\$1,400.00

Insight Group Unit Rates 21-May-19

Concrete

	Unit	Rate
Compressive Strength, Concrete Cylinder	per test	\$13.00
Flexural Strength, Concrete Beam	per test	\$32.00
Splitting Tensile Strength, Concrete Cylinder	per test	\$24.00
Compressive Strength, Concrete Core	per test	\$30.00
Compressive Strength, Grout Prism	per test	\$18.00
Compressive Strength, Mortar Cube	per test	\$30.00

Aggregate

Coarse Aggregate Gradation	per test	\$85.00
Fine Aggregate Gradation	per test	\$75.00
Base Course Gradation	per test	\$110.00
LA Abrasion	per test	\$275.00
Sulfate Soundness	per test	\$325.00
ASR, Coarse Aggregate	per test	\$675.00
ASR, Fine Aggregate	per test	\$600.00
Lightweight Pieces	per test	\$195.00
Fractured Faces	per test	\$65.00
Flat and Elongated Particles	per test	\$75.00
Fine Aggregate Angularity	per test	\$75.00
Sand Equivalent	per test	\$95.00
Coarse Aggregate Specific Gravity	per test	\$85.00
Fine Aggregate Specific Gravity	per test	\$125.00
Unit Weight	per test	\$40.00
Organic Impurities	per test	\$45.00
Cement Treated Base Mix Design	per test	\$1,250.00

Geotechnical Drilling

Mobilization of Track Diedrich D-50 Drill Rig	lump sum	\$500.00
Difficult Moving/Standby	per hour	\$215.00
Barge	per day	\$2,000.00
Pavement Coring	per hole	\$85.00
Auger Probes	per foot	\$11.00
Soil Test Borings	per foot	\$18.25
Soil Test Borings over Water	per foot	\$30.00
CPTu Soundings	per foot	\$15.25
CPTu Soundings with Seismic Testing	per test	\$35.00
CPTu Pore Pressure Dissipation Test	per hour	\$215.00
Test Pits	per hour	\$220.00



Insight Group
Unit Rates
21-May-19

Geotechnical Drilling *continued*

Dilatometer Testing	per foot	\$18.50
Disturbed (Bulk) Soil Samples	per sample	\$65.00
Shelby Tube Sample	per attempted sample	\$120.00
Casing 4" PVC	per foot	\$6.00
Casing 4" Steel	per foot	\$7.50
Grout Seal of Test Holes	per foot	\$7.50
Installation and Monitoring of Geotechnical Instrumentation	negotiated	

NON-COLLUSION AFFIDAVIT

The undersigned bidder or agent, being duly sworn on oath, says that he/she has not, nor has any other member, representative, or agent of the firm, company, corporation or partnership represented by him, entered into any combination, collusion or agreement with any person relative to the price to be bid by anyone at such letting nor to prevent any person from bidding nor to include anyone to refrain from bidding, and that this bid is made without reference to any other bid and without any agreement, understanding or combination with any other person in reference to such bidding.

He/She further says that no person or persons, firms, or corporation has, have or will receive directly or indirectly, any rebate, fee gift, commission or thing of value on account of such sale.

OATH AND AFFIRMATION

I HEREBY AFFIRM UNDER THE PENALTIES FOR PERJURY THAT THE FACTS AND INFORMATION CONTAINED IN THE FOREGOING BID FOR PUBLIC WORKS ARE TRUE AND CORRECT.

Dated this 25th day of October, 2019

Insight Group, LLC
(Name of Organization)

Construction Consultant
(Title of Person Signing)

[Signature]
(Signature)

ACKNOWLEDGEMENT

STATE OF South Carolina
COUNTY OF Charleston) ss

Before me, a Notary Public, personally appeared the above named and swore that the statements contained in the foregoing document are true and correct.

Subscribed and sworn to me this 25 day of October, 2019.

Cathy A. Bowers
Notary Public Signature

My Commission Expires: 08/12/25

