

Mayor Steven J. Carrington
Deputy Mayor Pamela Melin
Council Member Carolina Anzilotti
Council Member John Alcantra
Council Member Richard W. Best
Council Member Thomas Ojala IV
Council Member Joshua Tudor

City Manager John Moosey
City Clerk Shelly M. Acteson, CMC
City Attorney Sarah Heath, Esq.

City of Palmer, Alaska
Regular City Council Meeting
October 25, 2022, at 6:00 PM
City Council Chambers
231 W. Evergreen Avenue, Palmer
www.palmerak.org

AGENDA

A. CALL TO ORDER

B. ROLL CALL

C. PLEDGE OF ALLEGIANCE

D. APPROVAL OF AGENDA

1. Approval of Consent Agenda
2. Approval of Minutes of Previous Meetings
 - a) October 11, 2022, Regular Meeting

E. COMMUNICATIONS AND APPEARANCE REQUESTS

1. **Proclamation** Recognizing Veterans Day
2. **Proclamation** Declaring November 1 as Extra Mile Day
3. Palmer Museum of History and Art Annual Report, Sam Dinges, Executive Director

F. REPORTS

1. City Manager's Report
 - Budget Documentation Presentation and Manager Overview
 - **Information Memorandum No. 22-007**: Discussion of Planning and Zoning's Resolution Recommending City Council Provide for an Update to the 2006 Comprehensive Plan
2. Mayor's Report
3. City Clerk's Report
4. City Attorney's Report

G. AUDIENCE PARTICIPATION

H. PUBLIC HEARINGS

1. **Resolution No. 22-032**: A Resolution of the City of Palmer Supporting the Don Young Recognition Act, naming the Palmer Job Corps Center as the Don Young Job Corps Center
2. **Resolution No. 23-001**: Adopting the 2023 City of Palmer Employee Pay Plan (1st Public Hearing)
3. **Resolution No. 23-002**: Adopting the 2023 Fee Schedule for the City of Palmer for the Fiscal Year Beginning January 1, 2023, and Ending December 31, 2023 (1st Public Hearing)
4. **Resolution No. 23-003**: Adopting the 2023 Fine Schedule for the City of Palmer for the Fiscal Year Beginning January 1, 2023, and Ending December 31, 2023 (1st Public Hearing)
5. **Resolution No. 23-004**: Adopting the Five-Year Capital Improvement Program for the Fiscal Year Beginning January 1, 2023, and Ending December 31, 2023 (1st Public Hearing)
6. **Resolution No. 23-005**: Adopting a Budget for the City of Palmer, Alaska for the Fiscal Year Beginning January 1, 2023, and Ending December 31, 2023, and Appropriating Monies (1st Public Hearing)

I. ACTION MEMORANDA

1. **Action Memorandum No. 22-060:** Authorizing the City Manager to Select and Execute a Purchasing Option for a New Fire Engine for Palmer Fire and Rescue
2. **Action Memorandum No. 22-061:** Authorizing the City Manager to Negotiate and Execute a Contract with USI Services, Not to Exceed \$48,000 for Health Care Brokerage Services
3. **Action Memorandum No. 22-062:** Authorizing the City Manager to Execute a Contract with White Knight Services in the Amount of not to exceed \$ 2,004.00 per complete call out for snow removal City facilities.

J. UNFINISHED BUSINESS

K. NEW BUSINESS

L. RECORD OF ITEMS PLACED ON THE TABLE

M. AUDIENCE PARTICIPATION

N. EXECUTIVE SESSION

O. COMMITTEE OF WHOLE: Discussion of "Next Steps" relating to the Acute Vagrancy Forum – (Note: Action May be taken by the Council following Committee of the whole)

P. COUNCIL MEMBER COMMENTS

Q. ADJOURNMENT

Tentative Future Palmer City Council Meetings

Meeting Date	Meeting Type	Time	Notes
November 1	Special	6 pm	Budget Meeting
November 8	Regular	6 pm	
November 15	Special	6 pm	Budget Meeting
November 22	Regular	6 pm	
December 13	Regular	6 pm	

A. CALL TO ORDER

A regular meeting of the Palmer City Council was held on October 11, 2022, at 6:00 p.m. in the Council Chambers, Palmer, Alaska. Mayor Carrington called the meeting to order at 6:00 p.m.

B. ROLL CALL

Comprising a quorum of the Council, the following were present:

Steve Carrington, Mayor
Carolina Anzilotti
Richard W. Best
Joshua Tudor

Pamela Melin, Deputy Mayor
John Alcantra
Thomas Ojala IV

Staff in attendance were the following:

John Moosey, City Manager
Shelly M. Acteson, CMC, City Clerk

Sarah Heath, City Attorney
Holly Dubose, Deputy City Clerk

C. PLEDGE OF ALLEGIANCE

The Pledge of Allegiance was performed.

D. ELECTION CERTIFICATION

1. **Resolution No. 22-030:** A Resolution of the Palmer City Council Accepting the Certificate of Canvass Board Results and Certifying the October 4, 2022, Regular City Election

Main Motion: To Approve the Agenda, Consent Agenda, and Minutes, as amended

Moved by:	Melin
Seconded by:	Anzilotti
Vote:	Adopted
Action:	Motion Carried

E. ADMINISTRATION OF OATH OF OFFICE FOR ELECTED COUNCIL MEMBERS AND MAYOR

City Clerk Acteson administered the Oath of Office to newly Elected Council Members and the Mayor.

F. ORGANIZATION OF COUNCIL

1. Election of Deputy Mayor

Mayor Carrington opened the floor for nominations.

Council Member Ojala nominated Council Member Melin as Deputy Mayor. The voice vote was unanimous.

2. Election of Alternate Deputy Mayor

Mayor Carrington opened the floor for nominations.

Council Member Alcantra nominated Council Member Anzilotti as Alternate Deputy Mayor. The voice vote was unanimous.

G. APPROVAL OF AGENDA

1. Approval of Consent Agenda
2. Approval of Minutes of Previous Meetings
 - a) September 13, 2022, Regular Meeting

Main Motion: To Approve the Agenda, Consent Agenda, and Minutes, as amended

Moved by:	Tudor
Seconded by:	Melin
Vote:	Approved
Action:	Motion Carried

Mayor Carrington noted that the name Megan should have been Maggie, located on page 2 and 3 of the minutes. The name change was corrected.

Council pulled Action Memoranda 22-054 until more information is available.

H. COMMUNICATIONS AND APPEARANCE REQUESTS

I. REPORTS

1. City Manager's Report:
 - Update on upcoming fire truck legislation.
 - Presentation of Capital Requests.
 - Presentation and Approval of Project Funding Requests.
2. Mayor's Report:
 - Upcoming meetings: 10/14 Acute Vagrancy at Matsu School District Administration Building at 6pm.
 - AML upcoming conference for newly elected Council Members.
3. City Clerk's Report:
 - No report.
4. City Attorney's Report:
 - No report.
 - Will not be present October 25, 2022, Council Meeting.

J. AUDIENCE PARTICIPATION

Wesley Artz:

- Commented on vagrancy in Palmer.
- Congratulated newly elected Council Members.

Eric Anderson:

- Congratulated newly elected Council Members.
- Agreed with Council Member Ojala's comment on pedestrian sidewalk from Cedar Hills Subdivision.

Jack Lua:

- Requested a follow up on his request from Public Works Staff concerning the proposed bike path.

Maggie Lua:

- Commented on adding additional Police Officers.
- Commented in opposition to a bike path on Evergreen.

Jackie Goforth:

- Congratulated newly elected Council Members.
- Commented positively on poll watcher experience.
- Commented on the Museum’s recent posting.

Mike Chmielewski:

- Commented in favor of public telephonic testimony.

K. PUBLIC HEARINGS

1. **Ordinance No. 22-008:** Adopting a New Official Zoning Districts Map Superseding the Prior Map Adopted on December 12, 2017, in Accordance with the PMC 17.16.010 Map - Replacement

Manager Moosey provided a staff report.

Mayor Carrington opened the public hearing.

Seeing no one come forward, Mayor Carrington closed the Public Hearing.

Council Members engaged in discussion regarding Ordinance 22-008.

Main Motion: To Adopt Ordinance No. 22-008

Moved by:	Best
Seconded by:	Tudor
Vote:	Approved
Action:	Motion Carried

2. **Resolution No. 22-031:** A Resolution of the Palmer City Council Identifying the City of Palmer’s Capital Project Priorities for State and Federal Funding

Manager Moosey provided a staff report.

Mayor Carrington opened the public hearing.

Eric Anderson:

- Noted that the projects should reside within City limits.

Mike Chmielewski

- Commented on priority of capital projects.

Wes Artz:

- Commented on details of capital projects.

Mayor Carrington closed the Public Hearing.

Council Members engaged in discussion regarding Resolution 22-031.

Main Motion: To Adopt Resolution No. 22-031

Moved by:	Melin
Seconded by:	Alcantra
Vote:	Approved
Action:	Motion Carried

Primary #1: To amend the order of items in Resolution No. 22-031 by reprioritizing items 4, 6, and 7 to items 2, 3, 4

Moved by:	Alcantra
Seconded by:	Melin
Vote:	Approved
Action:	Motion Carried

Primary #2: To Add Three Additional capital priorities to Resolution No. 22-031; Pedestrian bridge over Glenn Highway, Hidden Ranch Pump Track, and Walking Path from Cedar Park into town

Moved by:	Alcantra
Seconded by:	Melin
Vote:	Approved
Action:	Motion Carried

L. ACTION MEMORANDA

- 1. Action Memorandum No. 22-058:** Authorize the City Manager to Negotiate and Execute a Professional Services Agreement with HDL Engineering Consultants Construct Taxiway N, Improve Airport Drainage, & Construct Apron E project, and to update the Airport Layout Plan (ALP) and Obstacle Action Plan (OAP) following construction in the amount not to Exceed: \$886,605.00

Manager Moosey gave a staff report.

Council engaged in discussion regarding Action Memorandum No. 22-058.

Main Motion: To Approve Action Memorandum No. 22-058

Moved by:	Best
Seconded by:	Melin
Vote:	Unanimous
Action:	Motion Carried

- 2. Action Memorandum No. 22-059:** Authorizing the City Manager to Purchase Two New Patrol Vehicle and Equipment in the Amount of \$75,146.00 and to Purchase the Vehicle Under the Governmental and Proprietary Procurements Section of Palmer Municipal Code 3.21.230 by Attaching to the State of Alaska Contract

Manager Moosey gave a staff report.

Main Motion: To Approve Action Memorandum No. 22-059

Moved by:	Ojala
Seconded by:	Melin
Vote:	Unanimous
Action:	Motion Carried

3. Action Memorandum No. 22-054: Authorizing Utility Connection for Quantum Laundry Lounge, Located at 2151 South Woodworth Loop, Palmer, Alaska (Postponed from the 9/13/2022 and 9/28/22 meetings)

Manager Moosey gave a staff report.

Council engaged in discussion regarding Action Memorandum No. 22-054.

Main Motion: To Approve Action Memorandum No. 22-054

Moved by:	N/A
Seconded by:	N/A
Vote:	N/A
Action:	Postponed until more information is available

M. UNIFINISHED BUSINESS

N. NEW BUSINESS

O. RECORD OF ITEMS PLACED ON THE TABLE

Documents from Jackie Goforth, Memo from Richard Best, documents from Jackie Goforth

P. AUDIENCE PARTICIPATION

Jackie Goforth:

- Commented regarding the pride flag.

Wes Artz:

- Commented regarding the fire station.
- Commented regarding large crack on sidewalk and roadway downtown.

Eric Anderson:

- Commented regarding Action Memorandum 22-058.

Q. EXECUTIVE SESSION

R. COUNCIL MEMBER COMMENTS

Mayor Carrington:

- Asked Attorney to research processes and procedures for citizens to participate in audience participation.

Council Member Tudor:

- City Manager to research City Water Tower purchase price.
- Noted appreciation to the citizens of Palmer for voting for him.

Council Member Anzilotti:

- Thanked everyone for electing her to office.
- Asked for a way to publicize public events.
- Would like to establish a call-in line for citizens to call into meetings.

Deputy Mayor Melin:

- Commented regarding sidewalk improvement and maintenance.
- Encouraged the citizens to come and talk about the homeless issue in Palmer.
- Noted Council Member Anzilotti was selected to participate in the Alaska Policy Forum, Leadership Academy

Council Member Ojala:

- Congratulated everyone on the Council on the election.
- Noted the waste management and recycling efforts in Palmer.

Council Member Tudor:

- Thanked everyone for their vote during the election.
- Commented on the homeless issue and the quick response by the City police department.
- Directed City Manager, with Council support, to work with Public Works regarding waste management of septic in Palmer.

Council Member Best:

- Commented on a recent surgical procedure.
- Commented on a recent traffic offense.

S. ADJOURNMENT

With no further business before the Council, the meeting adjourned at 8:10 p.m.

Approved this 11th day of October, 2022.

Shelly M. Acteson, CMC, City Clerk

Steve Carrington, Mayor



PROCLAMATION

RECOGNIZING VETERANS DAY

WHEREAS, Veterans Day has its origins in the November 11th, 1918, armistice which brought World War I to a conclusion; and

WHEREAS, Alaska is home to approximately 75,000 military veterans who have served our nation honorably and selflessly, both at home and abroad, protecting the liberty of our nation and liberating the oppressed from tyranny and terror; and

WHEREAS, Veterans Day is a time to honor America's veterans for their patriotism, love of country, and willingness to uphold the nation's founding principles of liberty, opportunity, and justice for all; and

WHEREAS, By honoring these proud Soldiers, Sailors, Airmen, Marines and Coast Guardsmen throughout our country's history, we renew our commitment to upholding the democratic ideals they fought to preserve; and

WHEREAS, The citizens of Palmer must never take for granted our privileges and freedom or forget to give thanks and honor to those who risk their lives so that we may enjoy our many blessings.

NOW, THEREFORE, IT IS PROCLAIMED by the Mayor and City Council of the City of Palmer, Alaska, November 11, 2022, to be Veterans Day in the City of Palmer. I call upon all citizens and civic organizations to join me in this special observance and recognizing the great sacrifice of our veterans and active military members.

IN WITNESS WHEREOF, I have hereunto set my hand and cause the seal of the City of Palmer to be affixed on this 25th day of October, 2022.

Steve Carrington, Mayor

Shelly M. Acteson, CMC, City Clerk



PROCLAMATION

A PROCLAMATION DECLARING NOVEMBER 1 AS EXTRA MILE DAY

WHEREAS, Palmer, Alaska is a community which acknowledges that its individual citizens collectively “go the extra mile” in personal effort, volunteering, and service; and

AS, Palmer is a community which encourages its citizens to maximize their personal contribution to the community by giving of themselves wholeheartedly and with total effort, commitment, and conviction to their individual ambitions, family, friends, and community; and

WHERE, Palmer is a community which chooses to shine a light on and celebrate individuals and organizations within its community who “go the extra mile” in order to make a difference and lift up fellow members of their community; and

NOW, THEREFORE, IT IS PROCLAIMED by the Mayor of the City of Palmer, Alaska, November 1 to be Extra Mile Day. I urge each individual in the community to take time on this day to not only “go the extra mile” in his or her own life, but to also acknowledge all those who are inspirational in their efforts and commitment to make their organizations, families, and community a better place.

IN WITNESS, I have set my hand and cause the seal of the City of Palmer to be affixed on this xxxxx.

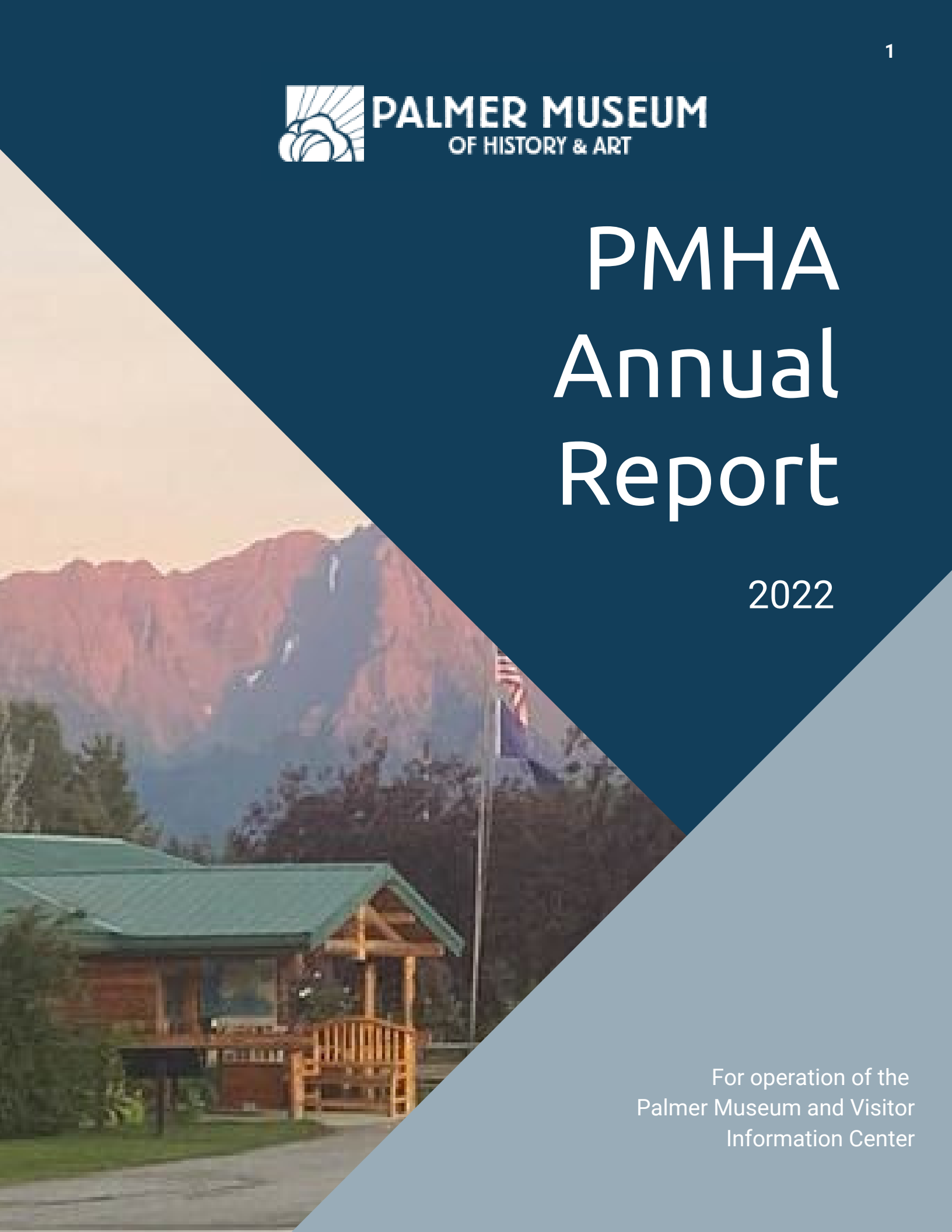
Steven J Carrington, Mayor

Shelly Aceteson, MMC, City Clerk



PMHA Annual Report

2022



For operation of the
Palmer Museum and Visitor
Information Center

Overview

The Palmer Museum of History and Art is a 501(c)3 nonprofit contracting with the City of Palmer to provide museum and visitor center services for the greater Palmer area. On average, we serve approximately 30,000 visitors each year. The building and much of the collection are owned by the City of Palmer, and PMHA manages the facility.

The organization was founded in 2005, originally providing only museum services. PMHA acquired the visitor center contract in 2012. We create exhibits, plan programming, and provide frontline concierge and destination marketing services for the Palmer region. About 45% of our annual budget (Totalled at \$302,715 for 2022) comes from our contracts with the City of Palmer.

In the summer (May 1 through September 15), we are open seven days a week from 9a to 6p. In the winter, (September 16 to April 31), we are open Tuesday through Friday from 10a to 4p.

“OUR WORK INSPIRES, ENRICHES, AND CULTIVATES OUR COMMUNITY’S CONNECTION TO THE UNIQUE HISTORY, CULTURE, AND ART OF THE GREATER PALMER AREA.”



From our online photo project



Our bicycle rentals in action

Board and Staff

BOARD OF DIRECTORS

President - Mari Jo Parks
 Vice President - Amber Lindstrom
 Secretary - Erin Saunders
 Treasurer - Margaret Adsit
 Director - Dean Phipps
 Director - Pat Chesbro
 Director - Felicia Desimini
 Director - Penny McClain
 Director - Becky Oviatt

STAFF

Executive Director - Sam Dinges (FT)
 Visitor Outreach Coordinator - Matthew Akers (FT)
 Collections Manager - Richard Estelle (PT)
 Collections Specialist - Dylainie Nathlich (PT)



Collections Specialist with a new photo collection

WE HAVE A NINE MEMBER BOARD AND A PERMANENT STAFF OF TWO FULL TIME AND TWO PART TIME EMPLOYEES. WE ADD THREE TO FOUR TEMPORARY PART TIME EMPLOYEES IN THE SUMMER.



Palmer Museum of History & Art-Plitt Collection

From our online photo project

Visitor Statistics

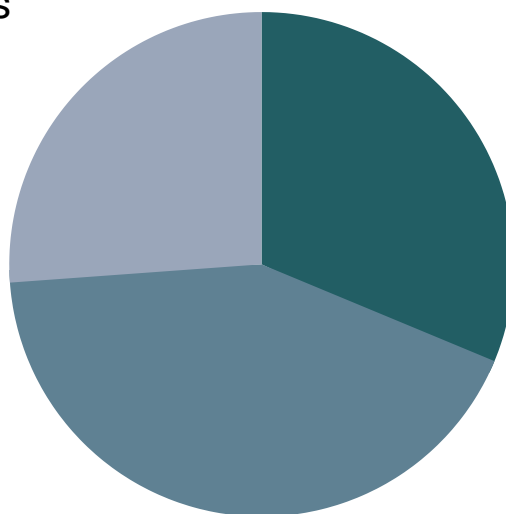
In a good year, we expect about 30,000 visitors to come to the Palmer Museum and Visitor Center. **As of September 25, 2022, our total is 26,500**, putting us well on track to exceed 30,000 by the end of the year. Last year, many buses (namely Princess) were still not running, and many of those prospective bus travelers became independent travelers instead.

Independent Travelers are traveling on their own, without a tour guide. They typically have more schedule flexibility and are marketed to by visitor guides, web/social media ads, and word of mouth recommendations.

Bus Travelers are part of a tour group, such as Princess, Premier, or Salmonberry. They typically have less schedule flexibility, but more money to spend. We market directly to tour companies for this group to try and bring them to Palmer.

IN 2019, TOURISM WAS THE TENTH LARGEST EMPLOYER IN ALASKA, AND WAS A \$4.5 BILLION INDUSTRY.

Bus Travelers
6,931



Independent (In State)
8,286

Independent (Out of State)
11,283

Action / Accomplish

2022

- **Art Around Palmer** - We received an \$8,400 grant from MEA to install art displays at ten different businesses around Palmer. This will safely feature art from our museum collection in prominent locations around Palmer for visitors and our community to see.
- **Artist of the Week** - For the fourth year running, we continued our Artist of the Week summer display series, featuring different Palmer area artists each week, debuting with the Friday Fling.
- **Beyond the Classroom** - Every year, we do a high school art exhibit during Colony Christmas, inviting MSBSD art classrooms to submit art. Thirty students from six schools get juried feedback, and we gave out two scholarships and donations to six art departments.
- **Bicycle Rentals** - Thanks to a donation from Backcountry Bike and Ski, we now have six bicycles for rent in the summer. Nearly 150 visitors toured Palmer by bike this season.
- **Bright Lights Book Project** - We partnered with the BLBP to give out free Alaskana and children's books to community members and visitors during each Friday Fling.
- **Cultural Guides** - Each year, we host cultural guides from Chickaloon every Friday who demonstrate traditional storytelling, beadwork, and Ahtna language.
- **Cyanotype Photo Workshops** - To highlight our photo project, we offered a series of free Cyanotype photo printing classes for 40+ adults using our historic photo collection.

THIS WAS A BIG YEAR FOR THE MUSEUM AND VISITOR CENTER, BOTH IN TRAFFIC AND PROGRAMMING. WE BROUGHT IN NEARLY \$35,000 BY END OF AUGUST IN GRANT FUNDING FOR NEW PROGRAMS, COLLECTION SUPPLIES, AND EXHIBITS.

Action / Accomplish

2022

- **Free Art Classes** - We piloted a free art class program for youth this summer, offering six classes to 80 children, with the help of local art teachers.
- **High Resolution Scanner** - We received a \$13,500 grant from Museums Alaska to purchase a high resolution scanner. This is allowing us to rapidly digitize Palmer collection of historic newspapers, as well as letters, journals, and other documents. We hope in 2023 to make many of these resources available online and searchable like the photo project.
- **Historic Walking Tours** - We took over 1,000 visitors, students, and community members on our historic walking tour, showing the story of the Matanuska Colony Project and more using Palmer's downtown historic district.
- **Matanuska Valley Historic Photo Project** - Palmer's online, searchable photo collection continues to grow. We have over 900 images of historic Palmer with descriptions, dates, and more available to view online at www.mvhphotoproject.org.
- **New Exhibits** - From savings and community donations, we developed and installed a topographic map of the Palmer area, featuring place names in English, Ahtna, and Dena'ina. We have continued remodeling the gallery to feature more pieces from the historic collection.
- **Palmer Visitor Guide** - We printed and distributed the 2022 Palmer Visitor Guide, putting 30,000 copies in the hands of visitors around the state. Over 50 Palmer businesses are listed, and we added new maps, interpretive info, and pages to the guide to accommodate growth.
- **Traveling Display Case** - We have received \$5,000 from the Palmer Lions Club, as \$4,000 in private donations to create a traveling display case to go to school libraries around Palmer teaching about our town's history. The case was manufactured locally, and the first display will tell the story of dairy farming and the Matanuska Maid.

Looking Ahead

2023

- **Arctic Winter Games** - PMHA is finalizing negotiations with the Arctic Winter Games Cultural Committee to develop the traveling exhibit for the games, including working with other museums / cultural institutions all around the Mat-Su Borough.
- **Colony Display Update** - With an influx of new Colony photographs, artifacts, and stories, we are redesigning our main gallery display for the Matanuska Colony Project and the founding of Palmer.
- **Free Art Classes (Youth)** - We are pursuing funding through the Alaska State Council on the Arts to increase our free summer art class offering to 10 free classes, serving 200 youth K-12
- **Free Art Classes (Adult)** - By popular demand, we are looking to offer a pilot program of free art courses for adults to compliment our youth art class offerings in summer 2023.
- **Historic Mapping Project** - Our collections team are developing a Google Maps interactive page, featuring map markers with accompanying text and images for the many landmarks, buildings, and places around Palmer.
- **History Storytime** - Complementing our free summer programming for youth, we plan to offer free live book readings for youth of books about Palmer and Alaska by volunteers.
- **New Tour Partnerships** - We are finalizing partnerships with Salmonberry Tours, Premier Alaska Tours, and Princess Tours to bring more buses to Palmer.
- **Online Collections** - This winter, we are upgrading our collections management software from PastPerfect to CatalogIt. Among other improvements, this will allow us to make the entire historic collection searchable and viewable online for our community.
- **Visit Palmer** - In late 2022, we are pursuing funding to take the visitpalmer.com digital destination marketing resource we have been working on from a demo site to a usable resource.

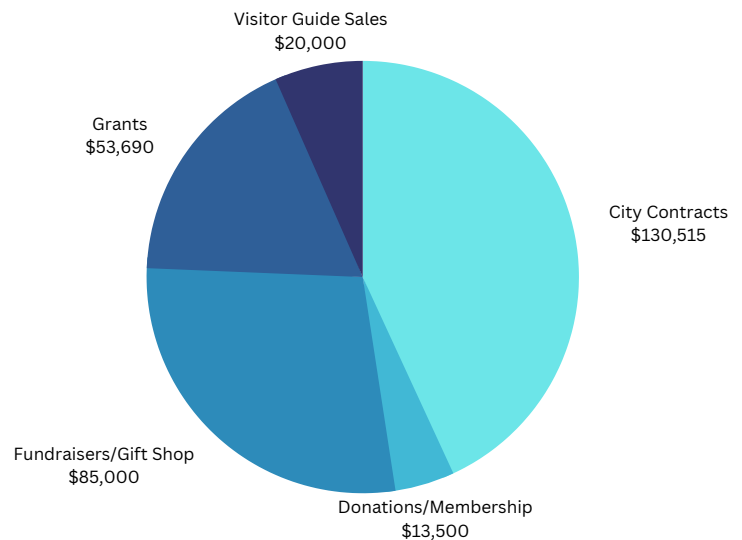
Budget and Funding

For 2022, the amounts of PMHA's two contracts with the City of Palmer were **\$75,115** for the VIC Contract and **\$55,400** for the MUS Contract (total **\$130,515**). For every **\$1.00** the city invests, PMHA brings in **\$1.32** grants, fundraising, and community support.

All MUS and VIC contract funds for 2022 have been spent or are allocated to payroll expenses, with priority to programmatic staff expenses.

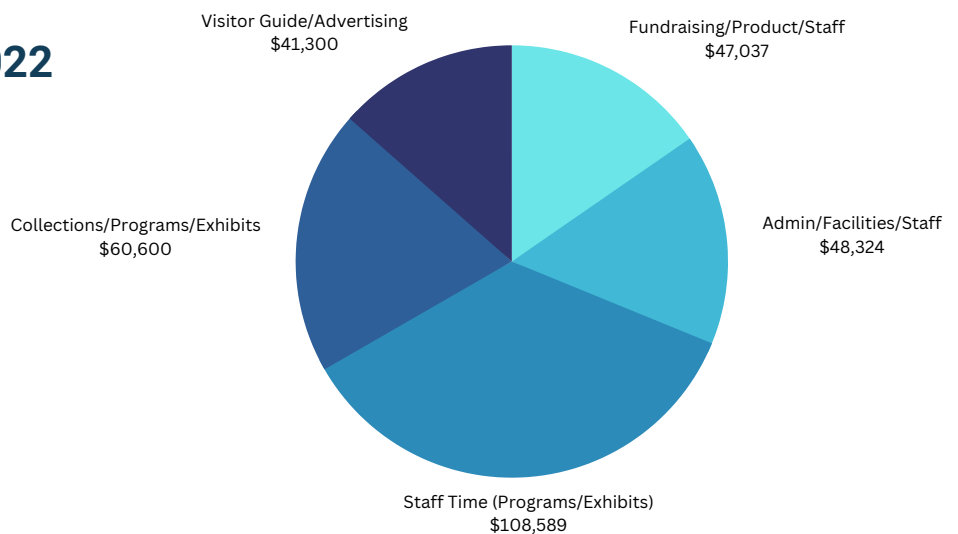
Budgeted Revenue - 2022

\$302,705



Budgeted Expense - 2022

\$305,850



As of 8/31/2022, we are on track to meet revenue and expenses within 5% of budget.

Growth / Needs

The biggest need for the City's Historic Collection is more space for storage and for display.

One of our volunteer guides on tour!



Visitor Guide Funding - The Palmer Visitor Guide remains our most effective tool for bringing visitors to town. Paper and shipping costs have increased up to 50%.

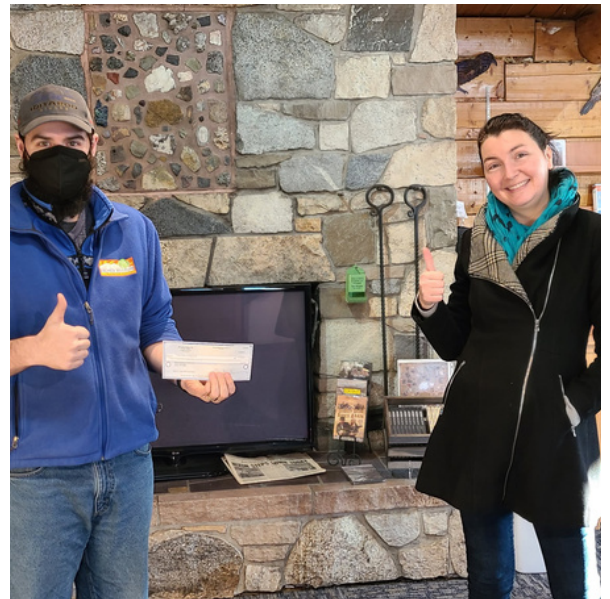
Display Space - We have a little 700 square foot display space in the building, and Palmer has a BIG story.

Controlled Storage - A lot of the collection requires environmentally controlled space to store properly.

THE CITY'S HISTORIC COLLECTION INCLUDES OVER 2,500 ARTIFACTS AND NEARLY 15,000 PHOTOS.



Ahtna cultural guides during Friday Fling



Receiving a grant from Museums Alaska

**City of Palmer
Information Memorandum No. 22-007**

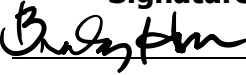
Subject: Discussion of Planning and Zoning's Resolution Recommending City Council Provide Funding for an Update to the 2006 Comprehensive Plan

Agenda of: October 25, 2022

Originator Information:

Originator: Brad Hanson, Director Community Development

Department Review:

Route to:	Department Director:	Signature:	Date:
_____	Community Development		_____
_____	Finance	_____	_____
_____	Fire	_____	_____
_____	Police	_____	_____
_____	Public Works	_____	_____

Certification of Funds:

Total amount of funds listed in this legislation: \$ _____

This legislation (√):

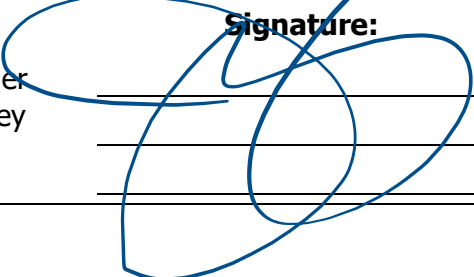
- Creates revenue in the amount of: \$ _____
- Creates expenditure in the amount of: \$ _____
- Creates a saving in the amount of: \$ _____
- Has no fiscal impact

Funds are (√):

- Budgeted Line item(s): _____
- Not budgeted

Director of Finance Signature: 

Approved for Presentation By:

Signature:	Remarks:
	_____
City Attorney	_____
City Clerk	_____

Attachment(s):

1. Planning and Zoning Resolution 22-005

Summary Statement/Background:

At the September 15, 2022, the Palmer Planning and Zoning Unanimously passed resolution 22-005 recommending the Palmer City Council appropriate funding to conduct an update to the 2006 Comprehensive Plan. The commission recommends only an update to the 2006 Comprehensive Plan.

The 2006 plan was prepared by Agnew::Beck with extensive public involvement, including a series of meeting with an advisory planning team, interviews with residents and businesses, and two well attended community meetings in May and October of 2005. The commission believes that the format and broad goals to achieve Community Vision are still applicable to the city and should be used to establish updated objectives to achieve the goals. Many of the strategic goals and initiatives from the 2006 plan have been achieved. An update will serve as a catalyst to guide community development.

The Planning and Zoning Commission is duly charged to periodically develop, alter or revise a comprehensive plan for the physical development of the city, subject to approval and amendment by the City Council. The commission believes that after 16 years the city should conduct a public process to confirm the relevance to the Comprehensive Plan and further develop a vision for Palmer into the future.

The goal of an update is to produce a statement of policies, goals, and standards to and assist the city with long-range planning for public services, facilities and infrastructure, transportation, land use, economic vitality and parks, recreational and culture.



Palmer Mayor's Report

October 25, 2022 Council Meeting

This last week I attended a Teams Planning meeting on Mat-Su School District: *Celebrate Life. Live Drug Free. They will be doing Red Ribbon Week events at local schools which I plan to participate with Sherrod Elementary and possibly Butte Elementary.*

Mat-Su Red Ribbon Events

Iditarod Elementary, Oct. 24 @ 1:30 p.m.

Sherrod Elementary, Oct. 25 @ 9:45 a.m.

Snowshoe Elementary, Oct. 26 @ 10:15 a.m.

Butte Elementary, Oct. 27 @ 1:30 p.m.

Oct. 14, 2022 Public Forum on Acute Vagrancy with a focus on actionable solutions driven by the citizenry of Palmer!

This last weekend I was attending a out of town conference, but Palmer's own Deputy Mayor Pam Melin hosted and most of the council attended this public forum Friday, Oct. 14. Although I didn't attend this meeting I have watched and listened to 2 different recordings of the session.

I found some notes from the meetings as follows:

Homeless/Vagrancy Issues:

- Trespassing
- Employees Not Safe
- Health Issues
- Needles
- Yelling/ Cursing
- Threats



Palmer Mayor's Report

Homeless/Vagrancy Solution Ideas:

- Interact
- Support each other
- Help them to get help
- Improve access to services
- Non-Profit support
- Affordable Housing
- Place to go during the day
- Better Transportation
- Better Information on Resources
- Flyer we can pass out with information on resources
- Job Opportunities
- Bring together service organizations
- Cut off drug supply
- Mobile Resource Center
- Mental Health Support
- Crisis Now Project
- Discourage Habitual Vagrancy
- United Way Pamphlet
- HealthyMatSu.org

Homelessness and Vagrancy are big issues for our small town. On our Oct. 25, 2022 agenda we have Committee of a Whole to talk about this meeting and where do we go from here.

From this meeting, two currently compiled resources identified are:

- the United Way Pamphlet (2 pages): <https://unitedwaymatsu.org/wp-content/uploads/2022/08/Matsu-United-Way-Pocket-Resource-Guide.pdf>
- the United Way Mat-Su Valley Resource Guide (57 pages): <https://unitedwaymatsu.org/wp-content/uploads/2022/08/March-2022-United-Way-Resource-Guide.pdf>



Palmer Mayor's Report

Upcoming Events:

PUBLIC OPEN HOUSE

City of Palmer

WHY?

The City of Palmer Board of Economic Development requested the Palmer City Council fund a public discussion regarding the railroad corridor's importance to downtown Palmer. This open house is an opportunity to discuss:

- Community Event Space (North of Depot)
- Parking Enhancements on Colony and Valley Way
- Motorized and Non-motorized Connectivity
- Park & Playground improvements
- Branding & Signage Recognizing Palmer's History
- Active Train Track implications

WHEN AND WHERE?

Palmer Community Center (Depot)
Wednesday, October 26, 2022
5:30 - 7:30 PM
610 S. Valley Way, Palmer, AK

Open House Conducted By

City of Palmer and Stantec Consulting Inc.

Representatives from the City of Palmer, Alaska Railroad and Stantec will be on hand to answer your questions and discuss your concerns.

Written comments about this project should be mailed to Brad Hanson; Community Development Director; 231 W. Evergreen Avenue Palmer, AK 99645

Attached to this report are some comments that have come in about homelessness and vagrancy.

Mayor Steve Carrington



Palmer Mayor's Report

From: Jacqueline Fries

Sent: Sunday, October 16, 2022 1:01 PM

To: Pamela Melin <pmelin@palmerak.org>

Subject: Another Letter to Safeway

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Good day –

I sent another letter to Safeway – this time to District Manager. Copy attached.

When I returned from the P.O., drove around Safeway. There is a new actor in the mix. I kid you not, he looks exactly like Freddy Kruger and is skinny as a rail and wiry. Actually, frightening.

If Safeway doesn't do some simple things – post property and monitor, thin and care for property, I'm leaving. Next door neighbors are leaving and two other residents are talking about it.

If the community chooses a street population over residents, so be it.

Take care – Keep fighting the good fight.

Jacqueline

10/14/20

Homeless in Palmer

Thoughts on the subject and possible solutions by Joseph Hawkins, Chiropractic Physician and Business owner. Not for a moment, even after years of reflection and study, do I feel I have a solution, but I do have

Assertions:

The number of homeless in Palmer is increasing. The increase in homeless is widely considered a "Problem" – I say this, because many of the homeless are homeless because of choice- which from their perspective, is not a problem. There are numerous factors that contribute to homelessness, among these and not necessarily in order of significance (because each individual homeless individual or family's situation is different)

Mental health, - Multiple causes for the onset of the mental health problem such as: trauma- TBI, stressors- abuse, sexual physical emotional abuse often as a youth, FAS, biological / physical dynamics- drugs

Drug abuse- with opioids right at the top and which by far most often start with legal prescriptions which then rapidly turn into addiction. – multiple prescriptions and OTC drugs in all their flavors and substances such as inhalants such as gas, paint, markers, tobacco to the newly socially acceptable pot. To accidental or intentional introduction to addictive drugs such and Fentanyl introduce as a lacing agent- often resulting in death if not addiction.

Financial – hardship- loss of income- often associated with job loss, medical bills, divorce, gambling and other addictions, fleeing abusive settings and many many other causes of financial hardship.

Human trafficking – Individuals who for all practical discussion are not in a home, even though they may have a roof over their head, they most certainly are homeless through drug addiction. (They have been introduced to drugs and are soon addicted and will comply to requests for sex work to get their drugs- to support the habit they were forced into.) Or physical threats and confinement to force the sexual labor or physical work from these individuals.

There are at least two general aspects of this problem that need to be addressed-

That is to say- Those who **ARE homeless** and we see in the woods with their tarps and on the curbs panhandling and those who are unseen in the wings **soon to be homeless**- at risk for receiving an opioid prescription without assuring it is appropriate in dose, time frame of use etc. and will be introduced to opioid addiction through well-meaning professionals, Pharm parties where these pharmaceuticals "pills" are dropped into a bowl and young kids are introduced through the thrill of random selection out of the bowl, introductory drugs even OTC medications or other substances taken in appropriately though injection or inhaling , stresses at home, or work, or society which can escalate to financial, food, mental health crisis. If there are not effective deterrents and community relations in place to prevent the

mental health illness, drug addiction, financial distress, and human trafficking that lead to homelessness- they soon will be in the pool of the actively homeless if no interventions are made.

if BOTH are not addressed, it is my opinion the efforts will in large part will fall short and the outcomes will be limited and or a waist of personal and community resources.

Example:

Stiff penalties for drug use is not helpful for those addicted, BUT it is effective for those who have not yet started drugs to prevent it is the first place. Just as long harsh prison terms are not helpful to “fix” the drug addicted individual, legalizing drugs, light sentences, etc. reduces the effectiveness of preventing addiction by making this behavior the “new normal”.

You are absolutely free to blow off any of the following interventions I present, but please, for every possible intervention I present, see that YOU offer a better intervention for the community “problem” we call homelessness. (I use “quotes”, because, as noted- there are some that are homeless, because they fully choose this life and it may not be our calling in life to remove this choice from them.)

Possible Interventions:

Just as we have legal areas in our community for a strip bar or a porn shop- something that many individuals (myself included) see as harmful to the individual and the community- but these activities and businesses have been determined as legal- so also, has panhandling and sleeping and living in public areas is determined as legal- However, if implemented properly and within limits, Areas can be zoned through legal public notice and approval.

Make legal panhandling “Zones” in Palmer where panhandling is legal- (Therefore we can in force and stop panhandling in the other areas that are not zoned for panhandling.) Along with the panhandling zones, just as bars are limited in their areas operation, so also we limit the panhandling to times when the local food bank, job placement service, and shelters are open to provide food and work opportunities for these individuals.

A “Public Citation” can be then issued – via a “photo cop” to individuals who give money or food, or resources to those “panhandling” in panhandling zones in restricted times, or in those areas where panhandling is not legally zoned.---- A “public citation ticket” might read something like this:

“On behalf of the Palmer City Council, we want to applaud and acknowledge your personal awareness of the need for food, housing, mental health support in our community. We thank you for your willingness to reach out to and help those in needs.

As a community we are working hard to address the needs of all residents and those just passing through. We have determined that the very safest and most effective way to help all or those in needs is through support of our free established community services. We have a Food bank (give address and map, phone number, and link to donate) job employment center (give address, map, phone number and link to donate) and churches (give address, map, phone number web site etc and link to donate)

If there is a second "violation" that is- the community member is "caught" on photo cop giving money or substance to a panhandler outside the authorized times and locations. They will receive the prior information, and also more non- profit entities in our community which are set up to help better address the problem of homelessness and encourage them to volunteer to these groups where their desire to help the community address the needs of your needy. Also education facts as to how giving directly to the panhandler in multiple levels is dangerous to the community and panhandler.

**City of Palmer
Resolution No. 22-032**

Subject: A Resolution of the City of Palmer Supporting the Don Young Recognition Act, naming the Palmer Job Corps Center as the Don Young Job Corps Center.

Agenda of: October 25, 2022

Council Action: **Approved** **Amended:** _____
 Defeated

Originator Information:

Originator: John Moosey, City Manager

Department Review:

Route to:	Department Director:	Signature:	Date:
_____	Community Development	_____	_____
_____	Finance	_____	_____
_____	Fire	_____	_____
_____	Police	_____	_____
_____	Public Works	_____	_____

Certification of Funds:

Total amount of funds listed in this legislation: \$ _____

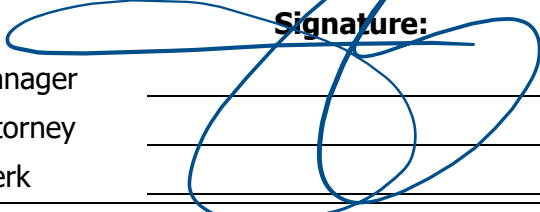
- This legislation (√):
- Creates revenue in the amount of: \$ _____
 - Creates expenditure in the amount of: \$ _____
 - Creates a saving in the amount of: \$ _____
 - Has no fiscal impact

Funds are (√):

- Budgeted Line item(s): _____
- Not budgeted _____

Director of Finance Signature: 

Approved for Presentation By:

Signature:	Remarks:
<u></u>	_____
City Manager	_____
City Attorney	_____
City Clerk	_____

Attachment(s):

1. Resolution No. 22-032

Summary Statement/Background:

The Don Young Recognition Act, naming the Palmer Job Corps Center as the Don Young Job Corps Center has been introduced by Senators Dan Sullivan and Lisa Murkowski. The attached resolution supports and encourages the Federal approval of this act.

Administration's Recommendation:

Approve Resolution No. 22-032 supporting the Don Young Recognition Act, which will rename the Palmer Job Corps Center as the Don Young Job Corps Center.

LEGISLATIVE HISTORY

Introduced by: Manager Moosey

Date: 10/25/2022

Action:

Vote:

Yes:

No:

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CITY OF PALMER, ALASKA

Resolution No. 22-032

A Resolution of the Palmer City of Palmer supporting the Federal Don Young Recognition Act, naming the Palmer Job Corps Center as the Don Young Job Corps Center.

WHEREAS, Don Young was first elected to the Alaska State House of Representatives in 1967; and

WHEREAS, Don Young was elected to the Alaska State Senate in 1970, and

WHEREAS, in 1973 Don Young was elected to the House of Representatives and served in that capacity until his death in 2022, and

WHEREAS, Don Young faithfully and fiercely defended Alaska and Alaskans and the United States of America, and

WHEREAS, Don Young was paramount in actions that advanced the Great State of Alaska such as authoring the construction of the Trans-Alaska pipeline, amendments to the Alaska Natives Claims Settlement Act, Magnuson-Stevens Fishery Conservation Act, and the National Wildlife Refuge System at of 1997, and

WHEREAS, Don Young was the longest-serving Republican in the history of Congress, and

WHEREAS, Representative Don Young served the Great State of Alaska faithfully and distinction for 49 years and 13 days,

NOW BE IT RESOLVED, that the City Council for the City of Palmer Alaska fully supports the approval of the Federal Don Young Recognition Act, and

BE IT FURTHER RESOLVED, that the City Council for the City of Palmer Alaska is very proud to support the renaming of the Job Corps Center to the Don Young Jobs Corps Center.

Approved by the Palmer City Council this ____ day of _____, 2022.

Steve Carrington, Mayor

Shelly Acteson, MMC, City Clerk

LEGISLATIVE HISTORY

Introduced by: City Manager Moosey
Date: October 25, 2022
Public Hearing: October 25, 2022
Action:
Vote:
Yes: No:

CITY OF PALMER, ALASKA

Resolution No. 23-001

A Resolution of the Palmer City Council Adopting the City of Palmer Employee Pay Plan

WHEREAS, the City of Palmer wishes to approve the attached pay plan for the compensation of employees;

NOW, THEREFORE, BE IT RESOLVED by the Palmer City Council hereby amends its employee compensation pay plan by adopting the attached "City of Palmer Pay Plan-January 1, 2023" with effective date of the pay plan to be January 1, 2023.

Approved by the Palmer City Council this 22nd day of November, 2022.

Steve Carrington, Mayor

Shelly M. Acteson, CMC, City Clerk

CITY OF PALMER PAY PLAN -- January 1, 2023
3% COLA

Implement: 01/09/2023

Council Approved:

LEVEL	Level Classification by Job Title		Steps									Longevity Steps*					
			1	2	3	4	5	6	7	8	9	A	B	C	D	E	F
1		Hourly	13.63	14.08	14.53	15.01	15.52	16.03	16.56	17.12	17.71	18.22	18.77	19.33	19.93	20.54	21.17
		Bi-weekly	1090.40	1126.40	1162.40	1200.80	1241.60	1282.40	1324.80	1369.60	1416.80	1457.60	1501.60	1546.40	1594.40	1643.20	1693.60
		Annual	28,350	29,286	30,222	31,221	32,282	33,342	34,445	35,610	36,837	37,898	39,042	40,206	41,454	42,723	44,034
2	Seasonal Arena Attendant Janitor/ Light Maintenance Library Technician Seasonal Groundskeepers / LT Maintenance	Hourly	15.22	15.72	16.25	16.79	17.37	17.94	18.56	19.21	19.87	20.48	21.09	21.74	22.40	23.10	23.82
		Bi-weekly	1217.60	1257.60	1300.00	1343.20	1389.60	1435.20	1484.80	1536.80	1589.60	1638.40	1687.20	1739.20	1792.00	1848.00	1905.60
		Annual	31,658	32,698	33,800	34,923	36,130	37,315	38,605	39,957	41,330	42,598	43,867	45,219	46,592	48,048	49,546
3	Library Specialist Receptionist & Cashier (PT)	Hourly	16.79	17.37	17.94	18.56	19.21	19.87	20.56	21.28	22.02	22.70	23.40	24.13	24.88	25.67	26.48
		Bi-weekly	1343.20	1389.60	1435.20	1484.80	1536.80	1589.60	1644.80	1702.40	1761.60	1816.00	1872.00	1930.40	1990.40	2053.60	2118.40
		Annual	34,923	36,130	37,315	38,605	39,957	41,330	42,765	44,262	45,802	47,216	48,672	50,190	51,750	53,394	55,078
4	Admin Assistant: Election Worker	Hourly	18.33	18.96	19.62	20.30	21.01	21.74	22.51	23.31	24.13	24.88	25.66	26.48	27.32	28.18	29.08
		Bi-weekly	1466.40	1516.80	1569.60	1624.00	1680.80	1739.20	1800.80	1864.80	1930.38	1990.40	2052.80	2118.40	2185.60	2254.40	2326.40
		Annual	38,126	39,437	40,810	42,224	43,701	45,219	46,821	48,485	50,190	51,750	53,373	55,078	56,826	58,614	60,486
5	Admin Asst - Public Safety (2), Public Works, Community Development, Library Mayor/Council/Clerk, City Manager Receptionist & Cashier Community Development Specialist Maintenance Worker, Seasonal Arena Specialist Arena & Facility Operations Assistance Groundskeeper Foreman, Library Assistant	Hourly	19.94	20.64	21.36	22.11	22.90	23.71	24.54	25.43	26.34	27.18	28.04	28.93	29.85	30.81	31.80
		Bi-weekly	1595.20	1651.20	1708.80	1768.80	1832.00	1896.80	1963.20	2034.40	2107.20	2174.40	2243.20	2314.40	2388.00	2464.80	2544.00
		Annual	41,475	42,931	44,429	45,989	47,632	49,317	51,043	52,894	54,787	56,534	58,323	60,174	62,088	64,085	66,144
6	Accounting Technician I, Dispatcher I Evidence & Records Custodian Lib Srvs Coordinator, W/WW Operator I Solid Waste Collector, Mechanic I	Hourly	21.54	22.29	23.07	23.90	24.75	25.63	26.55	27.51	28.50	29.42	30.35	31.32	32.33	33.37	34.45
		Bi-weekly	1723.20	1783.20	1845.60	1912.00	1980.00	2050.40	2124.00	2200.80	2280.00	2353.60	2428.00	2505.60	2586.40	2669.60	2756.00
		Annual	44,803	46,363	47,986	49,712	51,480	53,310	55,224	57,221	59,280	61,194	63,128	65,146	67,246	69,410	71,656
7	Building Inspector, Dispatcher II Equipment Operator, Mechanic Police Officer I, Support Services Specialist Utility Meter Reader & Laborer W/WW Operator II	Hourly	23.11	23.94	24.79	25.67	26.60	27.57	28.55	29.59	30.67	31.66	32.68	33.73	34.82	35.96	37.12
		Bi-weekly	1848.80	1915.20	1983.20	2053.60	2128.00	2205.60	2284.00	2367.20	2453.60	2532.80	2614.40	2698.40	2785.60	2876.80	2969.60
		Annual	48,069	49,795	51,563	53,394	55,328	57,346	59,384	61,547	63,794	65,853	67,974	70,158	72,426	74,797	77,210
8	Accounting Technician II Deputy City Clerk	Hourly	24.69	25.56	26.49	27.44	28.44	29.48	30.55	31.66	32.83	33.89	34.98	36.11	37.28	38.49	39.75
		Bi-weekly	1975.20	2044.80	2119.20	2195.20	2275.20	2358.40	2444.00	2532.80	2626.40	2711.20	2798.40	2888.80	2982.40	3079.20	3180.00
		Annual	51,355	53,165	55,099	57,075	59,155	61,318	63,544	65,853	68,286	70,491	72,758	75,109	77,542	80,059	82,680
9	Dispatch Supervisor, Fire Prevention Officer Fire Training Coordinator Parks & Facility Manager Police Officer II, Utilities Foreman	Hourly	26.28	27.23	28.20	29.23	30.30	31.43	32.58	33.78	35.03	36.16	37.34	38.56	39.81	41.12	42.47
		Bi-weekly	2102.40	2178.40	2256.00	2338.40	2424.00	2514.40	2606.40	2702.40	2802.40	2892.80	2987.20	3084.80	3184.80	3289.60	3397.60
		Annual	54,662	56,638	58,656	60,798	63,024	65,374	67,766	70,262	72,862	75,213	77,667	80,205	82,805	85,530	88,338
10	Library Director Police Detective Sergeant Police Sergeant	Hourly	27.84	28.86	29.91	31.00	32.15	33.32	34.56	35.83	37.17	38.38	39.64	40.93	42.28	43.67	45.11
		Bi-weekly	2227.20	2308.80	2392.80	2480.00	2572.00	2665.60	2764.80	2866.40	2973.60	3070.40	3171.20	3274.40	3382.40	3493.60	3608.80
		Annual	57,907	60,029	62,213	64,480	66,872	69,306	71,885	74,526	77,314	79,830	82,451	85,134	87,942	90,834	93,829
11	Airport Superintendent Commander, Controller Human Resource Manager Maintenance Superintendent	Hourly	29.43	30.81	31.61	32.76	33.98	35.24	36.54	37.90	39.32	40.60	41.93	43.31	44.73	46.21	47.73
		Bi-weekly	2354.40	2464.80	2528.80	2620.80	2718.40	2819.20	2923.20	3032.00	3145.60	3248.00	3354.40	3464.80	3578.40	3696.80	3818.40
		Annual	61,214	64,085	65,749	68,141	70,678	73,299	76,003	78,832	81,786	84,448	87,214	90,085	93,038	96,117	99,278
12	Directors: Community Development Finance, Public Works Fire Chief, Police Chief	Hourly	36.48	37.84	39.25	40.72	42.24	43.83	45.47	47.19	48.97	50.59	52.28	54.01	55.83	57.69	59.62
		Bi-weekly	2918.40	3027.20	3140.00	3257.60	3379.20	3506.40	3637.60	3775.20	3917.60	4047.20	4182.40	4320.80	4466.40	4615.20	4769.60
		Annual	75,878	78,707	81,640	84,698	87,859	91,166	94,578	98,155	101,858	105,227	108,742	112,341	116,126	119,995	124,010

***Pay Increments for Longevity**

Step A	When an employee reaches step A, B or C of their assigned pay level, the employee shall remain at step A, B or C for two (or more) years. When the employee completes two (or more) years at step A, B, or C the employee moves to step B, C or D of the Pay
Step B	Plan and is eligible for the increase indicated in step B, C or D; provided the employee received an overall rating of "satisfactory" or higher on his or her performance evaluation and worked continuously as a regular fulltime or part-time employee.
Step C	

Step D	When an employee reaches step D or E of their assigned pay level, the employee shall remain at step D or E for three (or more) years. When the employee completes three (or more) years at step D or E, the employee moves to step E or F of the Pay Plan
Step E	and is eligible for the increase indicated in step E or F; provided the employee received an overall rating of "satisfactory" or higher on his or her performance evaluation and worked continuously as a regular fulltime or part-time employee.
Step F	When an employee reaches the end of the pay scale (step F), the employee is no longer entitled to a step increase.

Note: Employees in longevity are prohibited from skipping steps and must remain at each step as indicated.

LEGISLATIVE HISTORY

Introduced by: City Manager Moosey

Date: October 25, 2022

Public Hearing: October 25, 2022

Action:

Vote:

Yes:

No:

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CITY OF PALMER, ALASKA

Resolution No. 23-002

A Resolution of the Palmer City Council Adopting the 2023 Fee Schedule for the City of Palmer for the Fiscal Year Beginning January 1, 2023 and Ending December 31, 2023,

WHEREAS, portions of the Palmer Municipal Code refer to fees "established in the current, adopted budget"; and

WHEREAS, the Fee Schedule establishes the fees for 2023 and becomes a part of the current, adopted budget.

NOW, THEREFORE, BE IT RESOLVED by the Palmer City Council hereby, through the budget process, adopts the attached fee schedule for a period of one (1) year, that being from January 1, 2023, through December 31, 2023.

Approved by the Palmer City Council this 22nd day of November, 2022.

Steve Carrington, Mayor

Shelly Acteson, CMC, City Clerk



City of Palmer

2023 Fee Schedule

(Adopted by Resolution No. 23-002)

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Airport Fees	
Aircraft Tie Down Space Apron A (1-27, T1-T9) 33'x44' Transient (per day)	\$ 5
Aircraft Tie Down Space Apron A (1-27, T1-T9) 33'x44' Monthly Apron C (6-33, 39-45) 33'x44' Monthly	\$ 32 30
Aircraft Tie Down Space Apron A (1-27, T1-T9) 33'x44' Quarterly Apron C (6-33, 39-45) 33'x44' Quarterly	\$ 91 85
Aircraft Tie Down Space Apron A (1-27, T1-T9) 33'x44' Annual Apron C (6-33, 39-45) 33'x44' Annual	\$ 334 310
Aircraft Tie Down Space Apron B (1-39)	\$ 32 30
Aircraft Tie Down Space Apron B (1-39)	\$ 91 85
Aircraft Tie Down Space Apron B (1-39)	\$ 334 310
Aircraft Tie Down Space Apron C (1-5, 34-38) 60'X61' Monthly	\$ 53 50
Aircraft Tie Down Space Apron C (1-5, 34-38) 60'X61' Quarterly	\$ 154 145
Aircraft Tie Down Space Apron C (1-5, 34-38) 60'X61' Annual	\$ 586 550
Aircraft Tie Down Space Large Aircraft Apron(1-2,T10) 75'x75' Transient (per day)	\$ 53 50
Aircraft Tie Down Space Large Aircraft Apron(1-2,T10) 75'x75' Quarterly	\$ 292 275
Aircraft Tie Down Space Large Aircraft Apron(1-2,T10) 75'x75' Annual	\$1,118 \$ 1,050
Aircraft Tie Down Space Large Aircraft Apron(3-6,T11)100'x100' Transient (per day)	\$ 90 85
Aircraft Tie Down Space Large Aircraft Apron(3-6,T11)100'x100' Quarterly	\$ 530 500
Aircraft Tie Down Space Large Aircraft Apron(3-6,T11)100'x100' Annual	\$2,070 \$ 1,950
Aircraft Tie Down Space Large Aircraft Apron (7, T12)100'x120' Transient (per day)	\$ 106 100
Aircraft Tie Down Space Large Aircraft Apron (7, T12)100'x120' Quarterly	\$ 636 600
Aircraft Tie Down Space Large Aircraft Apron (7, T12)100'x120' Annual	\$2,494 \$ 2,350
Rotary Aircraft Tie Down Space Helipad (1-3) 60' Circle Transient (per day)	\$ 27 25
Rotary Aircraft Tie Down Space Helipad (1-3) 60' Circle Transient Monthly	\$ 117 110
Rotary Aircraft Tie Down Space Helipad (1-3) 60' Circle Transient Quarterly	\$ 336 315
Rotary Aircraft Tie Down Space Helipad (1-3) 60' Circle Transient Annual	\$1,294 \$ 1,210
Aircraft Impoundment Fee	\$ 400
Storage fee for impounded aircraft (per month)	\$ 200
Airport Lease Application Fee	\$ 500
Fuel Flowage Fee (per gallon delivered)	\$.05
*All Tie Down Spaces add 3% sales tax (sales tax included in transient rate) Transient rate is for stay greater than 4 hours per day on airport grounds. Rates are not pro-rated.	

Animal Control Fees	
Animal license – dog/cat (three-year license – expires three years from date of issue)	\$ 10
Lost tag – animal license (expires three years from original issue date)	\$ 2.50
Animal impound (per animal)	\$ 30
Dangerous/vicious animal registration (one-time fee)	\$ 25

Appeals

Appeal to hearing officer regarding a decision of the Planning and Zoning Commission:	
Nonrefundable application filing fee	\$ 3,000
Deposit for preparation of the appeal record	\$ 500

Application Filing Fees (Filing fees are nonrefundable)

Mobile home park	\$ 500
Large Retail Establishment	\$ 500
Conditional Use Permit	\$ 500
Variance Request	\$ 500
Planned Unit Development (PUD)	\$ 500
Zone Change/Palmer Municipal Code Text Amendment	\$ 500
Accessory Dwelling Unit	\$ 100
Short Term Rental and Annual Renewal	\$ 75

Building Permit Fees Based on Total Valuation

Total Valuation:	Fee:	Additional Fee
\$1 to \$500	\$ 26	
\$501 to \$2000	\$ 26	for the first \$500 plus \$3.40 for each additional \$100, or fraction thereof, to and including \$2000
\$2001 to \$25,000	\$ 77	for the first \$2000 plus \$15.59 for each additional \$1,000, or fraction thereof, to and including \$25,000
\$25,001 to \$50,000	\$ 435.50	for the first \$25,000 plus \$11.25 for each additional \$1,000, or fraction thereof, to and including \$50,000
\$50,001 to \$100,000	\$ 716.75	for the first \$50,000 plus \$7.80 for each additional \$1,000, or fraction thereof, to and including \$100,000
\$100,001 to \$500,000	\$ 1,106.75	For the first \$100,000 plus \$6.24 for each additional \$1,000, or fraction thereof, to and including \$500,000
\$500,001 to \$1,000,000	\$ 3,602.75	For the first \$500,000 plus \$5.28 for each additional \$1,000, or fraction thereof, to and including \$1,000,000
\$1,000,001 and up	\$ 6,242.75	for the first \$1,000,000 plus \$4.06 for each additional \$1,000, or fraction thereof

Building Inspector Inspection Services and Fees

Plan Review Fee (4-plex or more residential units and all other non-residential projects) 65% of building permit fee	65%
Inspections outside normal business hours (per hour)*	\$ 125
Re-inspection fees assessed under provisions of Section 305.8 of the 97 UAC (per hour)*	\$ 100
Inspection for which no fee is specifically indicated (per hour)*	\$ 100
For use of outside consultants for plan check and inspections, – actual costs**	\$

* Or the total hourly cost to the jurisdiction, whichever is the greatest. There is a two hour minimum and this cost shall include supervision, overhead, equipment, hourly wages and fringe benefits of the employees involved.

** Actual costs include administrative and overhead costs.

Business Licenses	
Business License:	
Annual license	\$ 25
Biennial license	\$ 50
State Fair License (duration of Fair – not transferable to annual license)	\$ 25
Special Event License (duration of the special event up to three days (not transferable to annual license)	\$ 10
Door to Door Solicitors License (non-refundable annual fee)	\$ 50
Business License – failure to apply before business opens:	\$ 25
Business License – late filing fee:	
Through February 1	\$ 25
Additional fee on March 1 (not to exceed \$50)	\$ 25
State Fair vendors failure to apply for a business license by the first day of the Fair.	\$ 25
State Fair vendors additional fee on September 7	\$ 25
Special Event License	\$ 10
Business License – failure to display business license:	\$ 25
Door to Door Solicitors License Reprint – full application process	\$ 50
Copy of Business License list	\$ 25

Community Center (Railroad Depot) Rental		
Rental Period ----- 8 am to Midnight	Rental Rate	Security Deposit
Daily: Monday through Thursday	\$ 255 \$270 per day	\$ 150
Daily weekend: Friday through Sunday	\$ 305 \$325 per day	\$ 150
Recurring Use * (for Category 1, 2 & 3 Only**)	Rental Rate	Security Deposit
<u>Minimum rental of 15 calendar days per year:</u>		
Monday through Thursday	\$ 195 \$205 per day	\$ 150
Friday through Sunday	\$ 220 \$235 per day	\$ 150

* If use drops below number required for rate assessed due to cancellations, rental fee will be assessed from applicable rental period stated above.

**Recurring Use does not apply to Category 4 & Category 5 as defined in the City of Palmer Community Center (Depot) Rental Policy

CANCELLATION POLICY	
If 45 or more days notice	Full Refund rental rate and deposit
If less than 45 days notice	City keeps deposit and one day rental
If rental 3 consecutive days or more	Cancel 60 days in advance – Full refund
If rental 3 consecutive days or more	Cancel less than 60 days in advance – City keeps deposit and one day rental

Community Center (Railroad Depot) Rental Miscellaneous Fees	
Security Deposit	\$ 150
Re-hanging of ceiling noise baffles (per hour basis)	\$ 55
Lost key fee	\$ 150
Cleaning (if more than two hours is required – per hour basis)	\$ 75

Note: there is a two-hour minimum overtime fee for any City employee called out after work hours for any problems.

Election Fees	
Recount ballot application (per precinct)	\$ 200

Equipment Rental

Equipment rental and dry equipment rates when City must repair damages to City property. Labor costs are in addition to these rates.

Compactor	\$	35
Compressor	\$	60
Generator	\$	80
Push Mower	\$	25
Backhoe & Attachment	\$125	95
Bucket Truck	\$125	95
Cement Mixer	\$	45
Chainsaw	\$	30
Cut Off Saw	\$	25
Drain Cleaner	\$	50
Dredge	\$300	200
Dump/Flat Bed	\$	65
Dump Trucks (8 yard)	\$165	105
Garbage Truck	\$200	100
Graders	\$250	122
Hot Patcher	\$	75
Jumping Jack	\$	35
Front End Loader	\$125	98
Riding Mower	\$	55
Paver	\$	65
Pickup Truck	\$95	40
Plow/Sand Truck (large)	\$165	105
Pressure Washer	\$	25
Road Striper Power Liner	\$	45
Rototiller	\$	35
Snow Blower	\$325	210
Spreader	\$	25
Steam Truck	\$125	95
Street Sweeper	\$130	98
Trac Star Fusion Machine (per hour, 4 hour min) monthly price = \$19,000, monthly fee can be pro-rated	\$200	115
Trailer	\$	55
Trash Pump	\$50	25
Vactor	\$125	95
Water/Sewer/Maintenance Utility Trucks	\$95	40
Weed Blower	\$	25
Weed Whacker	\$	25

False Alarms	
False Burglar Alarm Fees (Within a 12 month period):	
First false alarm	\$ 0
Second false alarm	\$ 0
Third false alarm	\$ 75
Fourth false alarm	\$ 100
Fifth false alarm	\$ 125
Sixth false alarm	\$ 150
Seventh false alarm	\$ 175
Eighth false alarm	\$ 200
Ninth false alarm	\$ 225
Tenth false alarm	\$ 250
Each false alarm in excess of ten	\$ 300
False Fire Alarm Fees (Within a 12 month period):	
First false alarm	\$ 0
Second false alarm	\$ 300
Third false alarm	\$ 350
Fourth false alarm	\$ 400
Each false alarm in excess of four	\$ 400

Fire Equipment Items	
Fire/Rescue Apparatus, each (Includes STD Tools on Vehicle) ** (per day)	\$ 500
Portable Fire Pumps ** (per hour)	\$ 50
Portable Tank (per day)	\$ 50
Fire Hose, each section (all sizes) (per day)	\$ 20
Self-contained Breathing Apparatus (SCBA) ** (per day)	\$ 100
SCBA Spare Cylinder (includes refilling) (per day)	\$ 25
Additional fees will be charged for replacement of consumable items used (i.e. fuel for fires, wood supplies, etc.)	

** Additional fees will be charged for an Operator/Supply Officer of these items at the rate of \$18 per hour.

Fire Training Center Rental Fees	
Classroom, each (per day, includes A/V and restrooms)	\$ 150
Copy machine (per copy)	\$.25
CPR Mannequins, each (per day)	\$ 20
First-aid Training Kit (per day)	\$ 10
Airway Training Kit (per day)	\$ 20
Firefighting Small Classroom Props (per day)	\$ 10
Fire Behavior Carmody Kit (per day)	\$ 20
Hydrant Cutaway Large Prop (per day)	\$ 20
Pump Cutaway Large Prop (per day)	\$ 20
Training ground (per day, includes hydrant usage and field)	\$ 100

Fire Training Ground Items	
Smoke house (per hour)	\$ 50
Smoke Generator Machine ** (per day)	\$ 50
Tower Building and Burn Room (per hour)	\$ 50
Vehicle Extrication Training Grounds (per day – approximately)	\$ 100
Roof Simulator ** (per hour)	\$ 30
Hazmat Props (per hour)	\$ 20
Live Fire Class A Exterior Props ** (per hour)	\$ 20
Live Fire Class B Exterior Props ** (per hour)	\$ 50
Portable Fire Extinguishers 2.5 LB (per day)	\$ 10
Portable Fire Extinguishers 20 LB (per day)	\$ 10
Portable Fire Extinguishers 10 LB (per day)	\$ 15

Miscellaneous	
Notary fee (per act)	\$ 10
NFS Check Fee	\$ 30
Administrative fees on credit card charges of \$5,000 or higher (in person or phone transactions only)	3%

MTA Events Center	
Events Center Rental (ice covered) per day	\$ 2,500
Events Center Rental (dry floor) per hour, minimum 3 hours – up to 8 hours	\$ 100
Events Center Rental (dry floor) per day	\$ 1,000
Prime Ice Hour	\$ 230
Non-Prime Ice Hour	\$ 180
Paid Gate (Ice) Event Per Hour	\$ 255
Curling per hour	\$ 180
Curling Stone Rental Monthly	\$ 100
Public Skate Youth (4 & under) Helmet Mandatory	\$ Free
Public Skate	\$ 5
Public Skate Senior Ages 60+	\$ 4
Public Skate Family Pass (up to 4 people, each additional is \$4)	\$ 15
Public Skate Senior 10 punch card (60+)	\$ 35
Public Skate 10 punch card	\$ 45
Freestyle all ages	\$ 5
Freestyle 5 punch card	\$ 25
Skate Rental	\$ 3
Skate Rental 10 punch card	\$ 25
Skate Sharpen	\$ 7
Skate Sharpen 10 punch card	\$ 60
Shinny Hockey (by age group, full gear required)	\$ 7
Shinny Hockey 10 punch card (by age group, full gear required)	\$ 60
Stick Time (Helmets & gloves required)	\$ 5
Stick Time 10 punch card (Helmets & gloves required)	\$ 45
Broomball (Helmets & gloves required)	\$ 5
Birthday Party (up to 15 skaters, \$5 per additional skater)	\$ 100
Gym (daily)	\$ 5
Gym (monthly)	\$ 25

Neighborhood Park Development Fee Schedule

Dwelling Type:	
Single Family (per dwelling unit)	\$ 200
Multi-family (per dwelling unit)	\$ 150
Mobile home (per dwelling unit)	\$ 150

Palmer Public Library Fees

Overdue items (per day, maximum \$5 per item)	\$.25
Library community room rental (per hour with two hour minimum)	\$ 25
Library community room rental (nonprofit – annually, entitles renter one use per month)	\$ 100
Copying fee (per page)	\$.25
Replacement library cards	\$ 3
Temporary card (4 months)	\$ 10

Damaged Books

TBD = To Be Determined	
Chewed edge corner (per corner)	\$ 2
Defaced pages (per page or replacement cost)	\$ 2
Torn pages in book that cannot be repaired (replacement cost)	\$ TBD
Torn pages in book that can be repaired (per page)	\$ 2
Repeated dog eared pages (per book)	\$ 2
Chewed spine (top or bottom)	\$ 2
Rebinding (replacement cost of item plus administrative fee)	\$ TBD
Water/fluid damage (replacement cost plus administrative fee)	\$ TBD
Mildew (replacement cost plus administrative fee)	\$ TBD
Missing barcodes and spine labels on any library item (per item)	\$ 1
Missing or damaged any library item jacket or case	\$ 2
Lost or Damaged book Bag (replacement cost)	\$ TBD
Items returned to wrong book drop	\$ 1
Administrative reprocessing fee for lost or damaged books, DVD, audios, E-Readers	\$ 5

Damaged Videos/DVDs/CDs:

Damaged video, DVD, or CD (actual cost of repair plus administrative fee)	\$ TBD
Taping over a library video (replacement cost plus administrative fee)	\$ TBD
Broken or lost case	\$ 5

Damaged Audio Tapes:

Replacement (actual replacement cost)	\$ TBD
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Equipment:

E-Readers (actual replacement cost)	\$ TBD
Equipment loaned out (per day) plus \$100 refundable deposit	\$ 5
Damages to equipment (actual repair cost plus administrative fee)	\$ TBD

Permits

Itinerant Vendor permit	\$ 50
Fence permits	\$ 26
Shed Permit (up to 320 square feet)	\$ 26
Non-electrical sign permit (base fee plus \$1.50 per sq. ft of sign area)	\$ 25
Electrical sign permit (base fee plus \$3 per sq. ft of sign area)	\$ 50
Loud equipment permit (valid for eight hours)	\$ 25

Noise permit	\$	25
Water/Sewer Permits:		
Connection fee – water (new construction)	\$	400
Connection fee – sewer (new construction)	\$	400
Disconnect/abandonment fee – water (back to main)	\$	500
Disconnect/abandonment fee – sewer (back to main)	\$	500
Encroachment Permit (before construction)	\$	150
Encroachment Permit (after construction)	\$	250

Public Information Requests		
Copies (per page)	\$.25
Copies of drawings, plans, books, etc. – actual cost	\$	
Audio recording (per meeting)	\$	15
Public Safety audio recordings (per individual incident)	\$	20
Police Video Recording (per individual incident)	\$	20
Fire Report Copy	\$	20
Charge for staff time above five hours for research/copying costs – actual personnel cost	\$	
Collision Report (Per report, exceeds 10 pages, additional fee of \$0.35 per page)	\$	10
Officer Report (Per report, exceeds 10 pages, additional fee of \$0.35 per page)	\$	10
Dispatch Log (Per log, exceeds 10 pages, additional fee of \$0.35 per page)	\$	5
CD/DVD (Per CD/DVD)	\$	20
Public Safety Audio Recording - \$20.00 per individual incident plus \$0.54 a minute for review and \$5.40 a minute for redaction		
Public Safety Video Recording - \$50.00 per individual incident plus \$0.54 a minute for review and \$5.40 a minute for redaction		

Sales Tax		
Sales Tax Rate (\$1,000 cap per item/service)		3%
Sales Tax – late filing fee	\$	25
Sales Tax – delinquency tax interest rate – per year		15%
Sales Tax – late payment penalty		
a penalty of 5% of the tax for each month late or fraction there of after the due date, until total penalty of 20% has been accrued.	\$	
Sales Tax – collection upon sale – failure to collect	\$	150
Sales Tax – lien for tax, interest, and administration costs for penalties violation	\$	150
Sales Tax – PMC 3.16.260 – violation	\$	150
Online Sales Tax Credit Card Convenience Fee		3%
Contractor Certification of Exemption (for sales tax/per calendar year)	\$	250
Owner/Builder Exemption (for sales tax/per calendar year)	\$	30

Special Assessments	
Special Assessment District billing fee	\$ 3
Special Assessment Interest Rate	3%
Special Assessment Penalty Rate	3%

Utilities	
Deposit – water and sewer (new active customers)	\$ 100
Utility late fees (percentage of balance owed)	10%
Service call fee	\$ 50 25
Connection/Disconnect fee	\$ 25
Door tag fee for non-payment of prior months' utility bill	\$ 20 15
Transfer Tenant Utilities to Landlord for non-payment	\$ 15
Miscellaneous Repair Work hourly labor rate, contact the Department of Public Works for material costs	\$ 50
After Hours/Holiday/Weekend Inspection Fee (hourly)	\$ 125
Online Utility Payments Convenience Fee (transaction limit - \$5,000)	\$ 2.25
Monthly Water Rates:	
0 to 5,000 gallons (plus meter charge plus sales tax)	\$ 20.95 19.95
Over 5,000 gallons (plus meter charge and \$0.419 \$0.399 per 100 gallons plus sales tax)	\$ 20.95 19.95
Monthly Wastewater Rates:	
0 to 5,000 gallons (plus sales tax)	\$ 45.75 43.60
Over 5,000 gallons (plus \$0.915 \$0.872 per 100 gallons plus sales tax)	\$ 45.75 43.60
Dump Station Fee (per month)	\$ 180
Monthly Meter Charges:	
5/8" meter (plus sales tax)	\$ 16.15 15.40
3/4" meter (plus sales tax)	\$ 23.30 22.20
1" meter (plus sales tax)	\$ 41.20 39.25
1 1/2" meter (plus sales tax)	\$ 93.10 88.65
2" meter (plus sales tax)	\$164.95 \$ 157.10
3" meter (plus sales tax)	\$370.30 \$ 352.65
4" meter (plus sales tax)	\$659.80 \$ 628.40
6" meter (plus sales tax)	\$1,484.60 \$ 1,413.90
8" meter (plus sales tax)	\$2,639.15 \$ 2,513.50
Hydrant Meter Connection (3" Bulk) (per month plus \$.01 per gallon) (plus sales tax)	\$315.00 300.00
Monthly Unmetered Wastewater Service Rates:	
Unmetered wastewater service flat rate, 4 inch service line (plus sales tax)	\$ 52.50 50.00
Unmetered wastewater service flat rate, 6 inch service line (plus sales tax)	\$ 76.65 73.00
Service Fee for Utilities Outside City Limits:	
Monthly Service Fee for Outside City Limits	3%

Summer Sewer Rates:

Residential Rates:

Because summer month water consumption for residential customers increases due to lawn and garden irrigation without a related increase in the use of sewer service, residential customers shall be charged for water actually used for each month of the year, but their sewer service charges for each of the billing cycles to include the months of May, June, July and August shall be set to the flat rate fee equivalent to 0 - 5000 gallons of waste water usage plus sales tax as outlined in the current fee schedule.

Commercial Rates:

Commercial users may install separate water meters to meter water used exclusively for irrigation purposes during the months of May, June, July and August, provided that the commercial customer pays for the purchase and installation of a separate water meter for that purpose, and such installation is approved by the utility. The customer shall pay fees for all water used, but the amount of water used for irrigation through an irrigation system water meter will be deducted from the commercial account's total metered water consumption for the purpose of calculating monthly charges for sewer service.

Treatment Rates:	
0 - 5000 gallons (plus sales tax)	\$ 56.80
Over 5001 gallons (plus \$1.10 per 100 gallons) (plus sales tax)	\$ 56.80
Solid Waste Collection:	
Weekly refuse collection service (per month plus sales tax) 96 gallon can	\$ 29 28
Weekly refuse collection service (per month plus sales tax) 64 gallon can	\$ 23 22
Each additional container/bag 30 lb or less (per item)	\$ 5
64 and 96 gallon Residential Container Replacement cost	\$ 100
Oversize/special Item Collection/Disposal Fee	\$ 30
Freon Removal Fee	\$ 25
On-Call Dumpster (Residential Only) Monthly Fee	\$ 50
On-Call Commercial Dumpster (other Dumpster Service Required) – Monthly Fee	\$ 50
Disconnected Utility Container Removal Fee	\$ 10
Container Loss Recovery Fee	\$ 35 25
Container Delivery/Removal fee	\$ 25 10
Unscheduled Service Fee (different collection vehicle required)	\$ 50 40
Three Cubic Yard Container - Residential - each dump (plus sales tax)	\$ 31.50 30
Four Cubic Yard Container - Residential - each dump (plus sales tax)	\$ 40 38
Eight Cubic Yard Container - Residential - each dump (plus sales tax)	\$ 78 74
Three Cubic Yard Container – Commercial – Monthly fee (for one dump per week) (plus sales tax)	\$ 126 120
Three Cubic Yard Container – Commercial – Monthly fee (for two dumps per week) (plus sales tax)	\$ 252 240
Three Cubic Yard Container – Commercial – Monthly fee (for three dumps per week) (plus sales tax)	\$ 378 360
Four Cubic Yard Container – Commercial – Monthly fee (for one dump per week) (plus sales tax)	\$ 160 152
Four Cubic Yard Container – Commercial – Monthly fee (for two dumps per week) (plus sales tax)	\$ 320 304
Four Cubic Yard Container – Commercial – Monthly fee (for three dumps per week) (plus sales tax)	\$ 480 456
Eight Cubic Yard Container – Commercial – Monthly fee (for one dump per week) (plus sales tax)	\$ 312 296
Eight Cubic Yard Container – Commercial – Monthly fee (for two dumps per week) (plus sales tax)	\$ 624 592
Eight Cubic Yard Container – Commercial – Monthly fee (for three dumps per week) (plus sales tax)	\$ 936 888
Locking Dumpster (three or four yard includes delivery and pickup)	\$ 175

LEGISLATIVE HISTORY

Introduced by: City Manager Moosey
Date: October 25, 2022
Public Hearing: October 25, 2022
Action:
Vote:

Yes:	No:

CITY OF PALMER, ALASKA

Resolution No. 23-003

A Resolution of the Palmer City Council Adopting the 2023 Fine Schedule for the City of Palmer for the Fiscal Year Beginning January 1, 2023, and Ending December 31, 2023

WHEREAS, portions of the Palmer Municipal Code refer to fines “established in the current adopted budget”; and

WHEREAS, the Fine Schedule establishes the fines for 2023 and becomes a part of the current, adopted budget.

NOW, THEREFORE, BE IT RESOLVED by the Palmer City Council hereby, through the budget process, adopts the attached fine schedule for a period of one (1) year, that being from January 1, 2023, through December 31, 2023.

Approved by the Palmer City Council this 22nd day of November, 2022.

Steve Carrington, Mayor

Shelly Acteson, CMC, City Clerk



City of Palmer

2023 Fine Schedule

(Adopted by Resolution No. 23-003)

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As provided by the Palmer Municipal Code, the following fine schedule applies to all offenses in the Palmer Municipal Code unless a different penalty is specified. Citations for these offenses may be disposed of as provided in AS 12.25.195-230, without a court appearance, upon payment of the amounts listed plus the state surcharge required by AS 12.55.039 and AS 29.25.074. If a person charged with one of these offenses appears in court and is found guilty, the penalty imposed for the offense may not exceed the amount listed for that offense in this schedule.

Palmer Municipal Code (PMC) Title 1 General Provisions
Chapter 1.08 General Penalty
Section 1.08.011 General Fine Penalties
<p>If no other penalty is specifically or by adoption prescribed by a particular ordinance or in this document, the general penalty for violation of the ordinance is:</p> <ul style="list-style-type: none"> • \$75 for the first offense. • \$150 for the second offense of the same ordinance within 365 days of the first offense. • \$300 for the third offense of the same ordinance within 365 days of the second offense. <p>In accordance with AS 12.25.195 through 12.25.230, for a violation that cannot result in incarceration or the loss of a valuable license, a person may dispose of the citation without a court appearance by submitting to the clerk of court all of the following:</p> <ol style="list-style-type: none"> 1. Payment of the fine amount and the applicable surcharge listed in AS 12.55.039 and AS 29.25.074; and 2. A copy of the citation signed by the person indicating the person’s waiver of court appearance, entry of plea of no contest, and forfeiture of the fine. <p>When the fine is forfeited, a judgment of conviction shall be entered. The fine and applicable surcharge paid is complete satisfaction for the offense.</p>
Section 1.08.013 Other Remedies
<ol style="list-style-type: none"> A. The city may institute a civil action against a person, including a minor as provided in AS 29.25.072, who violates an ordinance. B. A person who violates a provision of this code may be subject to injunctive relief, compensatory relief, and a civil penalty not to exceed \$1,000 for each violation. C. An action to enjoin a violation may be brought notwithstanding the availability of any other remedy. D. On application for injunctive relief and a finding of a violation or threatened violation, the superior court shall grant the injunction. E. Each day that a violation of a provision of this code continues constitutes a separate violation. F. This section does not bar other civil remedies.
Section 1.08.020 Penalty Surcharge
<ol style="list-style-type: none"> A. In addition to any fine or other penalty prescribed by law, a person who pleads guilty or nolo contendere to, forfeits bail for, or is convicted of: <ol style="list-style-type: none"> 1. A violation of this code comparable to a misdemeanor offense under AS 28.33.030, 28.33.031, 28.35.030, or 28.35.032 and adopted under AS 28.01.010 shall be assessed the maximum surcharge pursuant to AS 12.55.039 and 29.25.074; 2. A misdemeanor or other violation of this code if a sentence of incarceration may be imposed for the misdemeanor or ordinance violation, other than a provision identified in subsection

(A)(1) of this section, shall be assessed the maximum surcharge allowable to Alaska Statutes 12.55.039 and 29.25.074; and

3. A misdemeanor or a violation of this code if a sentence of incarceration may not be imposed for the misdemeanor or ordinance violation shall be assessed the maximum surcharge allowable pursuant to Alaska Statutes 12.55.039 and 29.25.074 if the fine or bail forfeiture amount for the offense is \$30.00 or more.

B. The surcharge shall be deposited into the general fund of the state in accordance with AS 29.25.072.

Palmer Municipal Code (PMC) Chapter 1.10 City Seal

Palmer Municipal Code (PMC) Chapter 1.10 City Seal			
Chapter 1.10 City Seal			
Section Title:	Section Citation:	Fine:	Fine Citation:
Use of Seal without Permission Prohibited	1.10.020	\$ 300	1.10.020 B

Palmer Municipal Code (PMC) Title 5 Business Licenses

Palmer Municipal Code (PMC) Title 5 Business Licenses			
Chapter 5.04 Business Licenses; Chapter 5.13 Door-to-Door Solicitors			
Section Title:	Section Citation:	Fine:	Fine Citation:
License Failure-Unlawful Acts	5.04.110	Applicable to all of PMC Chapter 5.13:	5.04.110
License Fee and Failure to Apply	5.13.040		5.13.040
Carrying of License Required	5.13.100		5.13.100
Prohibitions	5.13.110		5.13.110
			First offense: \$ 75
		Second offense: \$ 150	
		Third offense: \$ 300	

Palmer Municipal Code (PMC) Title 6 Animals

Palmer Municipal Code (PMC) Title 6 Animals			
Chapter 6.08 Animal Regulations			
Section Title:	Section Citation:	Fine:	Fine Citation:
Cruelty to Animals	6.08.010	Applicable to all of PMC Chapter 6.08:	6.28.010
Animal Restrictions	6.08.020		6.28.010
Depositing Poison	6.08.030		6.28.010
Diseased Animals	6.08.040	First offense: \$ 75	6.28.010
Animal Noise	6.08.050	Second offense: \$ 150	6.28.010
Animal Odor	6.08.060	Third offense: \$ 300	6.28.010
Animals at Large	6.08.065		6.28.010
Animal Annoyance	6.08.067		6.28.010
Unattended Secure Animal	6.08.070		6.28.010
Disposal of Dead Animal	6.08.080		6.28.010
Confinement Requirements	6.08.090		6.28.010
Carrying Dogs Outside of Vehicle	6.08.100		6.28.010

Chapter 6.12 Licensing			
Section Title:	Section Citation:	Fine:	Fine Citation:
Registration – Dogs and cats	6.12.005	Applicable to all of PMC Chapter 6.12:	6.28.010
Application	6.12.010		6.28.010
Immunization	6.12.012		6.28.010
License Transfer	6.12.018	First offense: \$ 25	6.28.010
Fees	6.12.020	Second offense: \$ 50	6.28.010
Tag and Collar	6.12.030	Third offense: \$ 75	6.28.010

Chapter 6.14 Domestic Animal Bite and Attack Incidents			
Section Title:	Section Citation:	Fine:	Fine Citation:
Owner Compliance	6.14.060	First offense: \$ 100	6.28.010
		Second offense: \$ 200	
		Third offense: \$ 300	

Chapter 6.24 Hindering officers prohibited			
Section Title:	Section Citation:	Fine:	Fine Citation:
Hindering Officer Prohibited	6.24.010	First offense: \$ 75	6.28.010
		Second offense: \$ 150	
		Third offense: \$ 300	

Palmer Municipal Code (PMC) Title 8 Health & Safety

Chapter 8.09 Prohibiting the Distribution of Single-Use Disposable Plastic Shopping Bags			
Section Title:	Section Citation:	Fine:	Fine Citation:
Single-Use Disposable Plastic Shopping Bags Prohibited	8.09.030	First Offense: Warning Second Offense: \$ 100 Third Offense: \$ 300	8.09.050

Chapter 8.10 Prohibiting Smoking in Places of Employment and Public Places			
Section Title:	Section Citation:	Fine:	Fine Citation:
Smoking Prohibited	8.10.020	Applicable to all of PMC Chapter 8.10:	8.10.070
Reasonable Distance	8.10.030		8.10.070
Areas Where Smoking Not Prohibited	8.10.040		8.10.070
Sign Posting and Other Requirements	8.10.050	First offense: \$ 100 Plus required surcharges	8.10.070
No Retaliation nor Waiver of Rights	8.10.060	Second offense: \$ 150 Plus required surcharges, for a second violation with 24 month period	8.10.070
Violations and Penalties	8.10.070	Third offense: \$ 300 Plus required surcharges, for a third or additional violation within a 24 month period Civil penalties may not exceed \$300 per violation	8.10.070

Enforcement	8.10.080		8.10.070
Other Applicable Laws	8.10.090		8.10.070
Chapter 8.11 Marijuana Use and Prohibitions			
Section Title:	Section Citation:	Fine:	Fine Citation:
Consuming in a public place	8.11.030	\$ 100	8.11.030
Marijuana oil, flammable extraction	8.11.050	\$ 100	8.11.050
Chapter 8.12 Fluoridation			
Section Title:	Section Citation:	Fine:	Fine Citation:
Public Water System	8.12.010	\$ 300	1.08.011
Chapter 8.16 Sewage Disposal			
Section Title:	Section Citation:	Fine:	Fine Citation:
Waste Disposal Systems Required	8.16.010	\$ 300	1.08.011
Chapter 8.20 Garbage Collection and Disposal			
Section Title:	Section Citation:	Fine:	Fine Citation:
Garbage Disposal System Use Required	8.20.010	Applicable to all of PMC Chapter 8.20:	8.20.130
Adequate Receptacles Required, Time Limit	8.20.050		8.20.130
Depositing Restrictions	8.20.060	First offense: \$ 75	8.20.130
Unauthorized Dumpster and Container Usage	8.20.070	Second offense: \$ 150 Third offense: \$ 300	8.20.130
Clean Premises Required	8.20.080		8.20.130
Unauthorized Dumping Prohibited	8.20.090	First offense: \$ 150	8.20.130
Occupant Duties – Containers	8.20.100	Second offense: \$ 300	8.20.130
Vehicles	8.20.110	Third offense: \$ 600	8.20.130
Refuse Accumulation Prohibited	8.20.120		8.20.130
Chapter 8.36 Nuisances			
Section Title:	Section Citation:	Fine:	Fine Citation:
Designated – Prohibited	8.36.010	Applicable to all of PMC Chapter 8.36:	8.36.130
Specific Acts Designated	8.36.020		8.36.130
Acts Requiring Permit	8.36.025	First offense: \$ 150	8.36.130
Snow and Ice Removal	8.36.050	Second offense: \$ 300	8.36.130
Dumping Debris/Blocking Ditch	8.36.060	First offense: \$ 250	8.36.130
Pump Locations	8.36.080	Second offense: \$ 450	8.36.130

Chapter 8.37 Junk Vehicles			
Section Title:	Section Citation:	Fine:	Fine Citation:
Junk Vehicles Unlawful	8.37.020	First offense: \$ 75	8.37.090
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 8.38 Nuisance – Junk, Litter and Unsightly Premises			
Section Title:	Section Citation:	Fine:	Fine Citation:
Final Notice to Abate Violation	8.38.060	Actual Recovery Cost to the City	1.08.011 or 1.08.013
Remedies	8.38.075	Actual Recover Cost to the City	1.08.011 or 1.08.013
Chapter 8.42 Fireworks			
Section Title:	Section Citation:	Fine:	Fine Citation:
Sales Prohibited	8.42.020	Applicable to all of PMC Chapter 8.42:	8.42.070
Authorized Uses	8.42.040		8.42.070
Permit Required	8.42.050		8.42.070
Permissible Uses	8.42.060	First offense: \$ 75	8.40.040
		Second offense: \$ 150	
		Third offense: \$ 300	

Palmer Municipal Code (PMC) Title 9 Public Peace, Morals & Welfare			
Chapter 9.02 Tampering with Public Notices			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited When	9.02.010	First offense: \$ 75	9.02.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.04 Impersonating an Officer			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited When	9.04.010	First offense: \$ 100	9.04.020
		Second offense: \$ 200	
		Third offense: \$ 300	
Chapter 9.06 Interference with Public Justice			
Section Title:	Section Citation:	Fine:	Fine Citation:
Interfering with Officer Prohibited	9.06.010	First offense: \$ 75	9.06.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.12 Assault and Battery			
Section Title:	Section Citation:	Fine:	Fine Citation:

Prohibited When – Definitions	9.12.010	First offense: \$ 75	9.12.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.20 Alcoholic Beverages			
Section Title:	Section Citation:	Fine:	Fine Citation:
Licensed Premises Closing Hours	9.20.010	Applicable to all of PMC Chapter 9.20:	9.20.050
Prohibited Acts Designated	9.20.020		9.20.050
Personal Liability	9.20.030		9.20.050
Election Day Sales Permitted	9.20.040	First offense: \$ 75	9.20.050
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.22 Gambling			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited When	9.22.010	First offense: \$ 75	9.22.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.24 Indecent Exposure			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited When	9.22.010	First offense: \$ 75	9.22.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.28 Obscenity			
Section Title:	Section Citation:	Fine:	Fine Citation:
Obscene Language Prohibited	9.28.010	Applicable to all of PMC Chapter 9.28:	9.28.050
Selling Obscene Materials Prohibited	9.28.020		9.28.050
Obscene Exhibitions Prohibited	9.28.030		9.28.050
Obscene Public Writing and Drawing Prohibited	9.28.040	First offense: \$ 75	9.28.050
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.30 Prostitution			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited – Procuring Prohibited	9.30.020	Applicable to all of PMC Chapter 9.30:	9.30.090
House of Ill Fame	9.30.030		9.30.090
Aiding in Prostitution Prohibited	9.30.040		9.30.090
Receiving Money from Prostitute Prohibited	9.30.50	First offense: \$ 75	9.30.090
		Second offense: \$ 150	
Remaining in House of Prostitution Prohibited	9.30.060	Third offense: \$ 300	9.30.090
Loitering for Prostitution Purposes Prohibited	9.30.070		9.30.090
Reputation Testimony Permitted	9.30.080		9.30.090

Chapter 9.38 Disturbing Public Assemblies			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited Acts Designated	9.38.010	First offense: \$ 75	9.38.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.39 Excessive Police Responses			
Section Title:	Section Citation:	Fine:	Fine Citation:
Excessive Police Responses	9.39.010	First offense: \$ 75	9.39.040
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.40 Trespass – Posting of Property			
Section Title:	Section Citation:	Fine:	Fine Citation:
Trespass – Posting of Property	9.40.010	First offense: \$ 75	9.40.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.48 Petit Larceny			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited When	9.48.010	First offense: \$ 75	9.48.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.50 Injury to Property			
Section Title:	Section Citation:	Fine:	Fine Citation:
Defacing Property– Injuring Animals	9.50.010	Applicable to all of PMC Chapter 9.50:	9.50.040
Injuring Plants or Fences	9.50.020		9.50.040
Injuring Monuments and Markers	9.50.030		9.50.40
		First offense: \$ 75	
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.56 Interference with Utilities			
Section Title:	Section Citation:	Fine:	Fine Citation:
Pollution of Drinking Water	9.56.010	Applicable to all of PMC Chapter 9.56:	9.56.030
Damage to Water or Utility System	9.56.020		9.56.030
		First offense: \$ 300	\$800
		Second offense: \$ 500	\$900
		Third offense: \$ 750	\$1,000
Chapter 9.58 Sale of Poison			
Section Title:	Section Citation:	Fine:	Fine Citation:

Selling Poison Without Label	9.58.10	First offense: \$ 75	9.58.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.60 Sale of Unwholesome Food			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited When	9.60.010	First offense: \$ 75	9.60.020
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.67 Curfew Hour for Minors			
Section Title:	Section Citation:	Fine:	Fine Citation:
Curfew Violations	9.67.020	Applicable to all of PMC Chapter 9.56:	9.67.050
Exceptions	9.67.030		9.67.050
		First offense: \$ 75	
		Second offense: \$ 150	
		Third offense: \$ 300	
Chapter 9.74 Discharge of Firearms			
Section Title:	Section Citation:	Fine:	Fine Citation:
Prohibited When – Exceptions	9.74.010	First offense: \$ 75	9.74.020
		Second offense: \$ 150	
		Third offense: \$ 300	

Palmer Municipal Code (PMC) Title 10 Vehicles & Traffic *

Chapter 10.04 Traffic Code			
Section Title:	Section Citation:	Fine:	Fine Citation:
Parking Prohibitions During Snow Accumulation and/or Drifting Snow Conditions	10.04.050	Applicable to all of PMC Chapter 10.04	10.04.050
Towing	10.04.055		10.04.055
No-Parking Areas – Identification	10.04.060 (B)	First offense: \$ 75 150	10.04.060
Parking Prohibited for Longer than 24 Hours	10.04.080	Second offense: \$ 150 300	10.04.080
		Third offense: \$ 300 500	
Prohibiting Parking that Obstructs Traffic	10.04.090		10.04.090
Prohibiting Parking in Construction Zones	10.04.100		10.04.100
Chapter 10.08 Regulation of Off-Highway Vehicles			
Section Title:	Section Citation:	Fine:	Fine Citation:

Operation Requirements	10.08.020	Applicable to all of PMC Chapter 10.08:	10.08.100
Equipment	10.08.030		10.08.100
Speed and Time Restrictions	10.08.040		10.08.100
Driver's License Required	10.08.050	First offense: \$ 75	10.08.100
Towing	10.08.060	Second offense: \$ 150	10.08.100
Parent, Guardian or Other Person Responsible	10.08.070	Third offense: \$ 300	10.08.100

*

1. The fine amounts are doubled for motor vehicle or traffic offenses committed in a highway work zone or traffic safety corridor, as those terms are defined in AS 28.90.990 and 13 AAC 40.010 (b).
2. An offense may not be disposed of, without court appearance, if the offense is in connection with a motor vehicle accident that results in the death of a person.

Palmer Municipal Code (PMC) Title 12 Streets, Sidewalks & Public Places

Chapter 12.16 Skateboards, Rollerblades and Similar Devices

Section Title:	Section Citation:	Fine:	Fine Citation:
Skateboards, Prohibition and Regulation	12.16.010	First offense: \$ 75	12.16.020
		Second offense: \$ 150	
		Third offense: \$ 300	

Chapter 12.24 Park and Recreational Facility Regulations

Section Title:	Section Citation:	Fine:	Fine Citation:
General Rules	12.24.025	First offense: \$ 75	12.24.050
		Second offense: \$ 150	
		Third offense: \$ 300	

Palmer Municipal Code (PMC) Title 14 Signs

Chapter 14.08 Sign Regulations

Section 14.08.0240 Remedies and Civil Penalties (applicable to entire chapter):

The city or an aggrieved person may institute a civil action against a person who violates a provision of this title or a term, condition or limitation imposed pursuant to this title. In addition to other relief, a civil penalty not to exceed \$300.00 may be imposed for each violation. Each day that a violation or an unlawful act or condition continues constitutes a separate violation. An action to enjoin a violation may be brought notwithstanding the availability of any other remedy. Upon application for injunctive relief and a finding of a violation or threatened violation, the superior court shall grant the injunction.

Palmer Municipal Code (PMC) Title 15 Buildings and Construction

Chapters 15.00 through 15.70

All chapters within Title 15 are subject to the following fines:	First offense: \$ 75	15.60.020
	Second offense: \$ 150	10.08.100
	Third offense: \$ 300	10.08.100

LEGISLATIVE HISTORY

Introduced by: City Manager Moosey
Date: October 25, 2022
Public Hearing: October 25, 2022
Action:
Vote:

Yes:	No:

CITY OF PALMER, ALASKA

Resolution No. 23-004

A Resolution of the Palmer City Council Adopting the Five-Year Capital Improvement Program for the Fiscal Year Beginning January 1, 2023, and Ending December 31, 2023

WHEREAS, Palmer Municipal Code 3.28 defines a "Five-year capital improvement program as an annual update and long-range need projection of the city included as part pf the annual budget".

NOW, THEREFORE, BE IT RESOLVED by the Palmer City Council hereby, through the budget process, adopts the attached five-year capital improvement program for a period of one (1) year, being from January 1, 2023, through December 31, 2023.

Approved by the Palmer City Council this 22nd day of November, 2022.

Steve Carrington, Mayor

Shelly Acteson, CMC, City Clerk

Legislative Priority	Project	Funding Sources	Year of Initiation/ Execution	Cost Estimate	2022 total	2022 Remaining	2023 Addition	2023 Total	2024 Addition	2025 Addition	2026 Addition	2027 Addition
Prior Years Ongoing												
N	MTA Equipment Arena	COP	Annually		\$ 86,154	\$ 71,294	\$ 50,000	\$ 121,294	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000
N	Water Reservoir Repair	COP-W/S	2017	\$ 183,265	\$ 44,034	\$ 44,034	\$ -	\$ 44,034				
N	ADA Sidewalk Match	COP/Grant	2017	\$ 250,000	\$ 70,029	\$ 70,029	\$ -	\$ 70,029				
N	Paving Upgrades/ Street Maintenance	COP	As needed	\$ 500,000	\$ 623,778	\$ 609,233	\$ -	\$ 609,233	\$ 200,000	\$ 200,000	\$ 100,000	\$ 100,000
N	Public Video	COP	2018	\$ 75,000	\$ 30,423	\$ 30,423	\$ -	\$ 30,423				
N	W/S Lift station and well pumps	COP-W/S	Annually	\$ 155,000	\$ 155,000	\$ 134,760	\$ 90,000	\$ 224,760	\$ 90,000	\$ 80,000	\$ 70,000	\$ 70,000
N	Water/Sewer Truck	COP-W/S	2018	\$ 55,000	\$ 10,655	\$ 10,655	\$ -	\$ 10,655		\$ 75,000		\$ 75,000
N	Police Vehicle Annual Replacement	COP	Annually	\$ 65,000	\$ 214,249	\$ -	\$ 42,000	\$ 42,000	\$ 135,000	\$ 135,000	\$ 140,000	\$ 140,000
N	Park Improvements	COP	As needed		\$ 99,104	\$ 99,104	\$ -	\$ 99,104				
N	Public Building Maintenance	COP	As needed	\$ 500,000	\$ 88,965	\$ 80,143	\$ -	\$ 80,143				
N	Airport Safety - Avigation Easement Phase I	COP	2019	\$ 450,000	\$ 16,600	\$ 2,260	\$ -	\$ 2,260				
N	Golf Course-Golf Carts	COP	Annually	\$ 55,000	\$ 55,000	\$ 36,379	\$ 70,000	\$ 106,379	\$ 70,000	\$ 70,000	\$ 70,000	\$ -
N	Golf Course Infrastructure	COP	Annually	\$ 20,000	\$ 15,000	\$ -	\$ -	\$ -	\$ 135,000	\$ 40,000	\$ -	\$ -
N	Depot updates-piping	COP	2019	\$ 15,000	\$ 3,262	\$ 3,262	\$ -	\$ 3,262				
N	Roads-Sander truck with plow blade	COP	2020	\$ 175,000	\$ 175,264	\$ -	\$ -		Prior Year Funded (Carry over) \$11,350,252			
N	Traffic Safety Planning	COP	2020	\$ 135,000	\$ 105,891	\$ 105,891	\$ -	\$ 105,891	2023 Recommended additional funding \$1,560,104			
N	Airport Safety - Avigation Easement Phase II	FAA/COP	2021	\$ 395,482	\$ 310,996	\$ 265,105	\$ -	\$ 265,105				
N	Taxiway November Design Project	FAA/COP	2021	\$ 446,093	\$ 296,320	\$ 32,326	\$ -	\$ 32,326				
N	Garbage Truck	COP	2021	\$ 352,000	\$ 351,927	\$ -	\$ -	\$ -				
2022												
N	City Hall Copier	COP	2022	\$ 20,000	\$ 20,000	\$ 20,000	\$ -	\$ 20,000				
N	City Hall Folding Machine	COP	2022	\$ 20,000	\$ 20,000	\$ 11,573	\$ -	\$ 11,573				
N	Com Dev Vehicles	COP	2021/2022	\$ 60,000	\$ 39,232	\$ 5,897	\$ -	\$ 5,897	\$ 50,000	\$ 50,000		
N	Palmer Tennis Courts	COP	2022	\$ 50,000	\$ 75,000	\$ 5,619	\$ -	\$ 5,619				
N	Fire Support Vehicle	COP	2022	\$ 80,000	\$ 80,000	\$ 43,173	\$ -	\$ 43,173				
N	Fire Command Vehicle & Equipment	COP	2022	\$ 80,000	\$ 80,000	\$ 43,173	\$ -	\$ 43,173				
N	PW Vehicles	COP	2022	\$ 92,000	\$ 92,000	\$ 21,046	\$ 74,000	\$ 95,046		\$ 85,000		\$ 85,000
N	PW-Street Sweeper	COP	2022	\$ 335,000	\$ 335,000	\$ 442	\$ -	\$ 442				
N	PW Bobcat	COP	2022	\$ 91,588	\$ 87,387	\$ 4,201	\$ -	\$ 4,201				
N	Vactor Truck	COP	2022	\$ 227,750	\$ 227,750	\$ -	\$ -					
N	Vactor Truck	W/S	2022	\$ 227,750	\$ 227,750	\$ -	\$ -					
N	Mud Cat Dredge	W/S	2022	\$ 222,605	\$ 222,605							
N	Library Sidewalk	COP	2022	\$ 70,000	\$ 70,000	\$ 70,000	\$ 120,000	\$ 190,000				
N	Road Paving 2022	COP	2022	\$ 400,000	\$ 400,000	\$ 200,000	\$ 300,000	\$ 500,000	\$ 300,000	\$ 300,000	\$ 200,000	\$ 200,000
N	Airport Plow Truck	COP	2022	\$ 48,000	\$ 48,000	\$ 12,523	\$ -	\$ 12,523				
N	Construct Taxiway November, Phase 1	FAA	2022	\$ 6,846,666	\$ 6,846,666	\$ 6,846,666	\$ -	\$ 6,846,666				
N	Apron E Construction	FAA/COP	2022	\$ 2,383,041	\$ 2,383,041	\$ 2,383,041	\$ -	\$ 2,383,041				

Legislative Priority	Project	Funding Sources	Year of Initiation/ Execution	Cost Estimate	2022 total	2022 Remaining	2023 Addition	2023 Total	2024 Addition	2025 Addition	2026 Addition	2027 Addition
N	Engine Bolt Heaters on Apron E	COP	2022	\$ 88,000	\$ 88,000	\$ 88,000	\$ -	\$ 88,000				
2023												
N	City Hall Carpet Replacement & Interior Paint	COP	2023	\$ 115,000			\$ 115,000	\$ 115,000				
N	City Hall Phone System Update/Replacement	COP	2023	\$ 35,000			\$ 35,000	\$ 35,000				\$ 150,000
N	MTA Flooring Replacement - Locker Rooms	COP	2023	\$ 15,000			\$ 15,000	\$ 15,000				
N	Parks & Facility Storage Shed/Maintenance	COP	2023	\$ 150,000			\$ 150,000	\$ 150,000				
N	Depot Building Back Deck Replacement	COP	2023	\$ 10,000			\$ 10,000	\$ 10,000				
N	Library Parking Lot	COP	2023	\$ 25,000			\$ 25,000	\$ 25,000				\$ 100,000
N	Police Evidence Room (Carpet & Flooring)	COP	2023	\$ 20,000			\$ 20,000	\$ 20,000				
N	Fire Engine	COP	2023	\$ 950,000			\$ 950,000	\$ 950,000				
N	Install Drainage Parking Lot Training Ctr/Com Dev	COP	2023	\$ 80,000			\$ 80,000	\$ 80,000				
N	Purchase Fire Hose	COP	2023	\$ 100,000			\$ 100,000	\$ 100,000				
N	City Wide Curb painting	COP	2023	On Going			\$ 46,000	\$ 46,000	\$ 48,000		\$ 51,000	\$ 51,000
N	Water Correlator	W/S	2023	\$ 50,000			\$ 50,000	\$ 50,000				
2024												
N	Railroad ROW Improvements	COP	2024	\$ 500,000					\$ 200,000	\$ 200,000	\$ 100,000	\$ -
N	Community Development Bldg Landing & Stairs	COP	2024	\$ 30,000					\$ 30,000			
N	Library Air Handler	COP	2024	\$ 50,000					\$ 50,000			
N	Parks Improvements Bleachers, Pavilion for Curtis Arcala	COP/Grants	2024	On Going					\$ 50,000	\$ 100,000	\$ 60,000	\$ 60,000
N	Replace Brush Truck	COP	2024	\$ 200,000					\$ 200,000			
N	Replace Support 3-1	COP	2024	\$ 100,000					\$ 100,000			
N	Update Fire classroom building	COP	2024	\$ 150,000						\$ 150,000		
N	Fire Support vehicle (replacement/equip) with lift gate	COP	2024	\$ 80,000						\$ 80,000		
N	Training Center EOC Addition	COP	2024	\$ 1,000,000					\$ 1,000,000			
N	Purchase Air Packs	COP	2024	\$ 80,000					\$ 80,000			
N	Depot Updates- Windows	COP	2024	\$ 60,000					\$ 60,000			
N	Storm Drain Design	COP	2024	\$ 500,000					\$ 500,000			
N	PW Bucket Truck	COP	2024	\$ 230,000					\$ 230,000			
N	Construct PW Sand Storage Building	COP	2024	\$ 91,000					\$ 91,000			
2025												

Legislative Priority	Project	Funding Sources	Year of Initiation/ Execution	Cost Estimate	2022 total	2022 Remaining	2023 Addition	2023 Total	2024 Addition	2025 Addition	2026 Addition	2027 Addition
N	Public Safety Bldg Updates	COP/Grant	2025	\$ 185,000						\$ 185,000	\$ 260,000	
N	Remodel Station 3-1	COP/Grant	2025	\$ 1,000,000						\$ 1,000,000		
N	Pave Vehicle Area Fire Training Ctr/Com Dev	COP	2025	\$ 120,000						\$ 120,000		
N	PW Loader	COP	2025	\$ 350,000						\$ 350,000		
N	Airport Sand Storage/AARF Truck	COP	2025	\$ 750,000						\$ 750,000		
N	Acquire Avigation Easement, Construct Mitigation & Relocate RW16 Threshold	FAA/COP	2025	\$ 2,218,900						\$ 2,218,900		
2026												
N	City Hall Exterior Painting	COP	2026	\$ 100,000							\$ 100,000	
N	Replace Rescue 3-1	COP	2026	\$ 500,000							\$ 500,000	
2027												
N	Purchase Turnouts	COP	2027	\$ 120,000								\$ 120,000
N	Aviation Campground	FAA/COP	Undetermined	\$ 1,001,100								
N	Acquire Buffer Lands	FAA/COP	Undetermined	\$ 3,033,500								
N	Emergency Generator City Hall	Grant	Undetermined	\$ 400,000								
N	Generator for Fire St36 (training center)	COP	Undetermined	\$ 50,000								
N	Roof over Fire conexas	COP	Undetermined	\$ 55,000								
N	Design new Library buiding	COP	Undetermined	\$ 100,000								
N	Public Library Extension Ph II	Bond	Undetermined	\$ 5,000,000								
N	Design Museum phase 2	COP	Undetermined	\$ 250,000								
Y	Historic Palmer Water Tower Purchase		Undetermined	\$ 100,000								
Y	Park Project Walk to the Fair		Undetermined	\$ 300,000								
Totals	Totals			\$ 35,824,879	\$ 14,150,082	\$ 11,350,252	\$ 2,342,000	\$ 13,692,252	\$ 3,669,000	\$ 6,238,900	\$ 1,701,000	\$ 1,201,000

2023 Funding Breakdown		\$ 2,272,000	additional
General Fund	\$ 2,132,000	\$571,896 from annual contribution	\$1,560,104 from General Fund unassigned balance
Airport Fund	\$ -	Enterprise Fund	
Solid Waste Fund	\$ -	Enterprise Fund	
W/S	\$ 140,000	Enterprise Fund	

Legislative Priority	Project	Funding Sources	Year of Initiation/ Execution	Cost Estimate	2022 total	2022 Remaining	2023 Addition	2023 Total	2024 Addition	2025 Addition	2026 Addition	2027 Addition
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2024 Funding Breakdown \$ 3,669,000 additional

General Fund	\$ 3,579,000	\$500,000 from annual contribution	\$3,079,000 from General Fund unassigned balance
W/S	\$ 90,000	from enterprise funds	
Airport Fund	\$ -	Enterprise Fund	

2025 Funding Breakdown \$ 6,238,900 additional

General Fund	\$ 3,115,000	\$450,000 from annual contribution	\$2,665,000 from General Fund unassigned balance
W/S	\$ 155,000	from enterprise funds	
Airport Fund	\$ 2,968,900	Enterprise Fund	

2026 Funding Breakdown \$ 1,701,000 additional

General Fund	\$ 1,631,000	\$400,000 from annual contribution	\$1,231,000 from General Fund unassigned balance
W/S	\$ 70,000	from enterprise funds	
Airport Fund		Enterprise Fund	

LEGISLATIVE HISTORY

Introduced by: City Manager Moosey
Date: October 25, 2022
Public Hearing: October 25, 2022
Action:
Vote:

Yes:	No:

CITY OF PALMER, ALASKA

Resolution No. 23-005

A Resolution of the Palmer City Council Adopting a Budget for the City of Palmer, Alaska for the Fiscal Year Beginning January 1, 2023, and Ending December 31, 2023, and Appropriating Monies

WHEREAS, as required in Chapter VI of the City of Palmer Municipal Charter, a public hearing regarding the City of Palmer Fiscal Year 2023 Budget was held on Tuesday, October 25, 2022, and continued on Tuesday, November 22, 2022; and

WHEREAS, the Palmer City Council has reviewed the budget presented by the City Manager for the 2023 fiscal year.

NOW, THEREFORE, BE IT RESOLVED by the Palmer City Council:

Section 1. That the budget presented to the Council by the City Manager for the fiscal year 2021 has been reviewed by the City Council.

Section 2. That money shall be appropriated from all City funds as follows:

	Revenues
General Fund (01)	\$ 13,637,920
Enterprise Funds	
Water/Sewer (02)	\$ 3,706,500
Airport (03)	\$ 549,274
Solid Waste (05)	\$ 853,000
Golf Course (15)	\$ 697,155
Capital	
General CIP Projects (08)	\$ -
General CIP Equipment (09)	\$ -
Road Fund (10)	\$ -
Water & Sewer Projects (24)	\$ 140,000
Airport CIP Projects (30)	\$ -
Special Revenue Funds	
Police Grants (52)	\$ 125,000
Narcotics Grant (53)	\$ 133,780
Total Revenues	\$ 19,842,629

	Expenditures
General Fund (01)	\$ 13,599,758
Enterprise Funds	
Water/Sewer (02)	\$ 2,935,652
Airport (03)	\$ 446,393
Solid Waste (05)	\$ 852,765
Golf Course (15)	\$ 697,155
Capital Improvements	
General CIP Projects (08)	\$ -
General CIP Equipment (09)	\$ -
Road Fund (10)	\$ -
Water & Sewer Projects (24)	\$ 140,000
Airport CIP Projects (30)	\$ -
Special Revenue Funds	
Police Grants (52)	\$ 125,000
Narcotics Grant (53)	\$ 133,780
Total Expenditures/Expenses	\$ 18,930,503

Section 3. That the rate of the tax levy for the City of Palmer, Alaska for the fiscal year 2023 shall be fixed at 3.00 mills upon each dollar of assessed taxable real and personal property. The revenue from this tax levy is to be used for city purposes.

Section 4. That the 2023 budget is hereby approved for all funds in the amounts and for the purposes as stated above. The supporting line item budget detail as presented by the administration and reviewed by council is incorporated as part of this budget resolution.

Section 5. That the City of Palmer Fiscal Year 2023 operating budget is adopted for a period of one (1) year, that being from January 1, 2023, through December 31, 2023.

Approved by the Palmer City Council this 22nd day of November, 2022.

Steve Carrington, Mayor

Shelly Acteson, CMC, City Clerk

City of Palmer
Action Memorandum No. 22-060

Subject: Authorize City Manager to select and execute a purchasing option for a new fire engine for Palmer Fire & Rescue.


Agenda of: October 25, 2022

Council Action: **Approved** **Amended:** _____
 Defeated

Originator Information:

Originator: Chad Cameron, Fire Chief

Department Review:

Route to:	Department Director:	Signature:	Date:
_____	Community Development	_____	_____
<u>X</u>	Finance		<u>10/13/22</u>
_____	Fire	_____	_____
_____	Police	_____	_____
_____	Public Works	_____	_____

Certification of Funds:

Total amount of funds listed in this legislation: \$ **950,000**

- This legislation (√):
- Creates revenue in the amount of: \$ _____
 - Creates expenditure in the amount of: \$ 950,000
 - Creates a saving in the amount of: \$ _____
 - Has no fiscal impact

Funds are (√):

- Budgeted Line item(s): _____
- Not budgeted _____

Director of Finance Signature: 

Approved for Presentation By:

	Signature:	Remarks:
City Manager	_____	_____
City Attorney	_____	_____
City Clerk	_____	_____

Attachment(s):

1. Rosenbauer Quote dated October 7, 2022.
2. City of Palmer Fire Engine Diagram

Summary Statement/Background:

Palmer Fire & Rescue has been forced to retire their 1987 Grumman Spartan fire engine due to the fire engine unable to pass required annual testing for the past several years and the inability to repair due to the age of the apparatus. The 1987 Grumman has been removed from service due to reduce liability from the inability to pass required testing.

Annual testing is required to ensure the apparatus meet the requirements set forth by the National Fire Protection Agency and the Insurance Services Office. Annual testing results for all apparatus are reported to the Insurance Services Office which is utilized to calculate the fire protection rating for the City of Palmer.

The life expectancy of a fire engine for the City of Palmer is approximately 25 years with a good maintenance plan.

The quote has been received from Rosenbauer for the price of \$867,149.00. This price is valid until November 6, 2022. Pricing of fire apparatus is expected to increase by at least 6% on December 1, 2022.

The quoted price of \$867,149.00 is more than likely to increase for change orders after the pre-construction meeting. Additionally, the price is not reflective of additional equipment necessary to put the apparatus in service such as a mobile radio and miscellaneous appliances. Palmer Fire & Rescue will utilize existing equipment to the best of our ability to minimize the amount necessary.

Agreeing and signing the attached contract locks in the pricing before change orders as quoted. Currently, there are a couple of different purchasing options. First, the City of Palmer can utilize funds to purchase the fire engine at the completion of the construction of the fire apparatus, estimated to be the first quarter of 2024. The second option available is a leasing option with an initial down payment and payment options over a specified time frame. This legislation allows the City Manager to select the best payment option for the City of Palmer with direction from the City Council and sign the requisite agreement(s).

Administration's Recommendation:

Approve Action Memorandum No. 22-060.

City of Palmer
231 West Evergreen
Fire Station
Palmer , Alaska 99645



Date: October 7, 2022

We hereby propose and agree to furnish, after your acceptance of this proposal and the proper execution by the City of Palmer , hereinafter called the Buyer and an officer of Rosenbauer South Dakota, LLC, hereinafter called the Company, the following apparatus and equipment.

Per Sourcewell Contract #: 113021-RSD	
#NAME?	\$867,149.00 each
This Price Shall Be Valid For 30 Days.	
Gross due upon completion and delivery total	TOTAL \$867,149.00
*Note: If chassis amount of \$385,405.00 is paid upon arrival at our plant in South Dakota, deduct \$14,794.00 each	

All of which are to be built in accordance with the specifications, clarifications and exceptions attached, and which are made a part of this agreement and contract.

DELIVERY:

The estimated delivery time for the completed apparatus, is to be made 480 days after receipt of and approval of this contract duly executed, (chassis and (or) major components must arrive within 365 days or delivery may be extended), subject to all causes beyond the Company's control. The quoted delivery time is based upon our receipt of the specified materials required to produce the apparatus in a timely manner. "Delivery" means the date company is prepared to make physical possession of vehicle available to customer.

CONTRACT CHANGES:

After execution and acceptance of this Contract, the Buyer may request that the Company incorporate a change to the Products or the Specifications for the Products by delivering a Change Order to the Company; provided, however, that any such Change Order must be in writing and include a description of the proposed change sufficient to permit the Company to evaluate the feasibility of such Change Order. Within seven (7) working days of receipt of a Change Order, the Company will inform the Buyer in writing of the feasibility of the Change Order, the earliest possible implementation date for the Change Order, of any increase or decrease in the Purchase Price resulting from such Change Order, and of any effect on production scheduling or delivery resulting from such Change Order. The Company shall not be liable to the Buyer for any delay in performance or delivery arising from any such Change Order. Purchase Price may be modified only by mutual written agreement of the Parties because of changes to the Apparatus required or requested by the Buyer during the construction process pursuant to Appendix C, Change Order Policy. Any changes in the Purchase Price resulting from changes to the Apparatus required or requested by the Buyer during the construction process shall be stated in the Change Order signed by both parties. Additional Changes: If various state or federal regulatory agencies (e.g. NFPA, DOT, EPA) require changes to the specification and/or the product that result in a cost increase to comply therewith this cost will be added to the Purchase Price to be paid by the customer.

FORCE MAJEURE:

The Company shall not be responsible nor deemed to be in default on account of delays in performance due to causes which are beyond the Company's control which make the Company's performance impracticable, including but not limited to civil wars, insurrections, strikes, riots, fires, storms, floods, other acts of nature, explosions, earthquakes, accidents, any act of government, delays in transportation, inability to obtain necessary labor supplies or manufacturing facilities, allocation regulations or orders affecting materials, equipment, facilities or completed products, failure to obtain any required license or certificates, acts of God or the public enemy or terrorism, failure of transportation, epidemics, quarantine restrictions, failure of vendors (due to causes similar to those within the scope of this clause) to perform their contracts or labor troubles causing cessation, slowdown, or interruption of work.

www.rosenbaueramerica.com

info@rosenbaueramerica.com

ROSENBAUER SOUTH DAKOTA, LLC.
100 THIRD STREET
P.O. BOX 57
LYONS, SOUTH DAKOTA 57041
P: 605.543.5591

ROSENBAUER MINNESOTA, LLC.
5181 280TH STREET
P.O. BOX 549
WYOMING, MINNESOTA 55092
P: 651.462.1000

ROSENBAUER MOTORS, LLC.
5190 280TH STREET
P.O. BOX 549
WYOMING, MINNESOTA 55092
P: 651.462.1000

ROSENBAUER AERIALS, LLC.
870 SOUTH BROAD STREET
FREMONT, NEBRASKA 68025
P: 402.721.7622



PAYMENT TERMS:

Final payment for the apparatus shall be made at time of delivery or pick up of the completed vehicle. It is the responsibility of the Buyer to have full payment ready when the apparatus is complete and ready to deliver. If payment is delayed or delivery is delayed pending payment, a daily finance and storage fee may apply. Upon delivery of the apparatus or upon pickup of the apparatus by the Buyer, the Buyer agrees to provide all liability and physical damage insurance. It is further agreed that if on delivery and testing, any defects should develop, the Company shall be given reasonable time to correct changes. Guarantee of the chassis is subject to the guarantee of the chassis manufacturer. *NOTE: upon final inspection at the factory for pick-up or delivery, the Buyer will need to supply a Certificate of Insurance and full payment prior to release of the vehicle, unless prior arrangements for vehicle's release have been made.

TITLE:

The Apparatus shall always be the property of the Company until it is delivered to the Buyer pursuant to the terms of this agreement. The Company shall bear the sole responsibility and risk for destruction, loss or damage to the apparatus, or any portion of the Apparatus, through the date and time it is delivered to the Buyer. The Company shall deliver good and merchantable title to the Apparatus at the time it is delivered to the Buyer. The Buyer shall bear the sole responsibility and risk for destruction, loss or damage to the Apparatus upon the date and time it takes delivery of the Apparatus.

PIGGY BACK ORDERS:

The Company, at its sole discretion, will allow the terms of the contract to be extended to both the Buyer, as well as to other Municipal, State, or Federal agencies for similar unit(s). The Company will allow tag on / additional orders for up to three (3) years from the date of contract execution. To facilitate pricing, the Company will quote the original price plus manufacturer's price increases or Producer's Price Index (PPI) whichever is greater as it applies to either Fire Apparatus and/ or commercial heavy truck industries.

MISCELLANEOUS PROVISIONS:

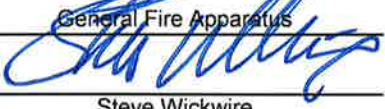
This agreement shall be construed in accordance with the laws of the State of South Dakota. The parties agree that any litigation arising from or in connection with any dispute between the parties under this agreement shall be venue in South Dakota. The parties agree that this agreement bears a rational relationship to the State of South Dakota, and they consent to the personal jurisdiction of such state and further consent and stipulate to venue in the above described court.

The amount in this proposal shall remain firm for a period of 30 days from the date of same.

Respectfully submitted,

Buyer:

We accept the above proposal and enter into contract with signature below.

Dealer: General Fire Apparatus

Sales Rep: Steve Wickwire

Title: _____

Title: _____

Date

After company receipt of this document signed by the Buyer, the document will be reviewed and upon approval, countersigned by the Company thereby putting the document in force.

Rosenbauer South Dakota, LLC

Title: _____
Date

www.rosenbaueramerica.com

info@rosenbaueramerica.com

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**APPENDIX C
CHANGE ORDER POLICY**

This change order policy is intended to reflect the increased cost of changes which result in delayed deliveries, confused paperwork, poor production flow and increased potential of trucks being built to incorrect specifications. With your cooperation, changes can be kept to a minimum which means we will be able to reduce lead times, increase production and maintain costs which will benefit all of us.

Our objective is accurate, high quality and on-time deliveries exceeding our customer expectations.

Changes any time after the order is received may delay the quoted delivery date. Significant design or component changes will have the largest impact on the schedule and quoted delivery date. Changes that occur later in the process will also have the largest impact on the schedule and quoted delivery date.

All time fences are reference to contract execution date if not otherwise stated.

Change Window #1

All changes will be priced at standard pricing and specials will be priced through our normal process. Significant changes made to the vehicle during this time period may result in a delivery extension.

- RBM Chassis 0-60 days
- RBA Aerial 0-60 days
- Rosenbauer Body 0-60 days

Change Window #2

All changes are subject to a 25% mark-up, as well as a \$250.00 change order processing fee. All changes are subject to factory review and may be denied due to engineering or lead time issues.

- RBM Chassis 61-75 days
- RBA Aerial 61-75 days
- Rosenbauer Body 61-120 days

Change Window #3

All changes are subject to a 50% mark-up, and 50% restocking fee on deleted items, as well as a \$250.00 change order processing fee. All changes are subject to factory review and may be denied due to engineering or lead time issues. No major components can be changed at this time; major components are considered engine, transmission, axles, suspension, cab, frame (wheelbase), seats, water pump and water tank.

- RBM Chassis 76-120 days
- RBA Aerial 76-120 days
- Rosenbauer Body 121-180 days

Change Window #4

Changes are not recommended at this time. Any changes requested will be priced on a time and material basis, as well as a \$500.00 change order processing fee. Any changes requested, and that are quoted to the customer, must be approved by the customer within three days or they will not be valid.

- RBM Chassis After 120 days
- RBA Aerial After 120 days
- Rosenbauer Body After 180 days

**Note: Any late change orders that are factory driven will be done at cost and no additional mark up or penalties will apply.*

BUYER INITIALS: _____

www.rosenbaueramerica.com

info@rosenbaueramerica.com

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P: 402.721.7822



PURCHASE ORDER

Purchaser		SUPPLIER	
Purchaser:	City of Palmer	Contract #	Sourcewell Contract #: 113021-RSD
Address 1:	231 West Evergreen	Supplier:	Rosenbauer South Dakota, LLC
Address 2:	Fire Station	Address 1:	100 3rd Street
City, State, Zip:	Palmer , Alaska 99645	Address 2:	
		City, State, Zip:	Lyons, SD 57041

Purchase Order Number:	New Fire Engine	Delivery in Calendar Days:	480
Date:	10/7/2022	Member #	170009

The amount in this proposal shall remain firm for a period of 30 days from the date of same.

Quantity	Description	Price	Price (Extended)
1	#NAME?	\$867,149.00	\$867,149.00
This Price Shall Be Valid For 30 Days.			
*Note: If chassis amount of \$385,405.00 is paid upon arrival at our plant in South Dakota, deduct \$14,794.00 each			
TOTAL			\$867,149.00

NOTES:	
---------------	--

Rosenbauer Dealer :	General Fire Apparatus
Salesperson:	Steve Wickwire
Signature:	

Purchaser:	City of Palmer
Print Name:	
Title:	
Date	
Signature:	

City of Palmer
Action Memorandum No. 22-061

Subject: Authorize the City Manager to Negotiate and Execute a Contract with USI Insurance Services, not to exceed \$48,000.00 for Healthcare Brokerage Services

Agenda of: October 25, 2022

Council Action: **Approved** **Amended:** _____
 Defeated

Originator Information:

Originator: John Moosey

Department Review:

Route to:	Department Director:	Signature:	Date:
_____	Community Development	_____	_____
_____	Finance	_____	_____
_____	Fire	_____	_____
_____	Police	_____	_____
_____	Public Works	_____	_____

Certification of Funds:

Total amount of funds listed in this legislation: \$ 48,000

This legislation (√):

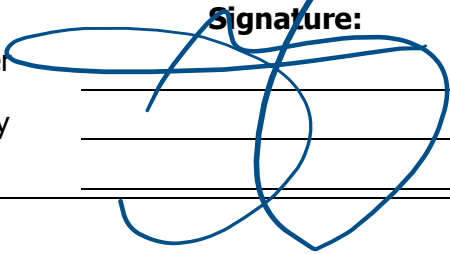
- Creates revenue in the amount of: \$ _____
- Creates expenditure in the amount of: \$ \$48,000.00
- Creates a saving in the amount of: \$ _____
- Has no fiscal impact

Funds are (√):

- Budgeted Line item(s): To be included in the 2023 budget in various accounts
- Not budgeted

Director of Finance Signature: 

Approved for Presentation By:

	Signature:	Remarks:
City Manager		_____
City Attorney	_____	_____
City Clerk	_____	_____

Attachment(s):

1. USI Insurance Services Proposal
2. RFP 22-02HR

Summary Statement/Background:

The City's current Healthcare Insurance Broker, USI Insurance Services, current contract expires January 31, 2023. In August 2022, a Request for Proposal for Healthcare Insurance Brokerage Services was issued for a new Healthcare Insurance Broker service.

Four proposals were received and reviewed with scoring based on criteria listed in the Request for Proposal. USI Insurance Services scored the highest and Wilson Albers was the next qualified proposer.

The City entered into discussions with USI Insurance Services, the most qualified proposer, and those discussions resulted in a fair and reasonable contract. The RFP allows for 3 additional 1-year renewals. Those renewals will not exceed \$48,000.00 for year 2, \$52,000.00 for year 3 and \$54,000.00 for year 4.

Administration's Recommendation:

Approve Action Memorandum No. 22-061.



RFP No. 22-02HR – Employee Health and
Supplemental Insurance Broker Services
Proposal Prepared for
The City of Palmer

September 16, 2022

Submitted by:

Matthew Lewis
Partner | *Vice President &
Lead Employee Benefits Consultant*
Cell: 206.661.2330
Office: 206.676.3310
Email: Matt.Lewis@usi.com

USI Insurance Services
3800 Centerpoint Drive, Suite 540 | Anchorage, AK 99503
601 Union Street, Suite 1000 | Seattle, WA 98101
www.usi.com

THE USI  ONE ADVANTAGE[®]



September 16, 2022

The City of Palmer
Attn: Kimberly Green, Human Resource Manager
231 West Evergreen Avenue
Palmer, AK 99645

Re: RFP No. 22-02HR – Employee Health and Supplemental Insurance Broker Services

Dear Kimberly and esteemed city council members,

Thank you for offering USI the opportunity to respond to the City of Palmer’s (“the City”) Employee Health and Supplemental Insurance Broker Services request for proposal. I fully recognize that my predecessor (who was employed by USI due to an acquisition) was not a great fit and fell short in some key areas. I also hope you have seen a marked turnaround in the service levels and follow through since I took over your account. In addition, my work to assign you a qualified and responsive Senior Account Manager, in Erin McNally, who has been and will continue to be available for in person meetings, helps illustrate our commitment to servicing the City of Palmer.

I believe that the City deserves an advisor that provides proactive consulting, as well as a suite of broad resources and technical expertise. An experienced team of specialists, a network of resources, and a concrete plan for designing, marketing, and enhancing your programs are the cornerstones of our service philosophy. We also bring unparalleled market leverage as one of the largest health and benefits brokers in Alaska and the Pacific Northwest, allowing us to negotiate enhanced policy rates, terms, and conditions for our clients.

USI employs more than 9,000 associates in over 200 offices across the country, delivering services in all 50 states—and beyond. Nationally we service over 800 public sector clients, regionally (PNW) over 100 and locally in Alaska, 24 as of this printing.

As your broker and consultant partner, I will continue to listen to your needs as we work with you to further build upon a strong, collaborative, and strategic plan that incorporates both short and long-term organizational goals and provides measurable results. I also encourage you to reach out to the supplied references to gain more insights into USI’s and my approach, abilities, and integrity.

I appreciate the opportunity to illustrate our services and look forward to addressing any further questions you may have as you review our proposal. Please do not hesitate to contact me directly for further information or clarification.

Sincerely,

A handwritten signature in black ink that reads "Matthew Lewis". The signature is fluid and cursive, with a long horizontal stroke extending from the end of the name.

Matthew Lewis

Partner | *Vice President & Lead Employee Benefits Consultant*

Cell: 206.661.2330

Office: 206.676.3310

Email: Matt.Lewis@usi.com

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• APPENDIX II: USI'S SIGNED FORMS	
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CONFIDENTIAL AND PROPRIETARY: This document and the information contained herein is confidential and proprietary information of USI Insurance Services, LLC ("USI"). Recipient agrees not to copy, reproduce, or distribute this document, in whole or in part, without the prior written consent of USI. Estimates are illustrative given data limitation, may not be cumulative, and are subject to change based on carrier underwriting.

EXECUTIVE SUMMARY

Within this summary, as well as throughout the body of our proposal, we've highlighted the philosophies, resources and service offerings we feel most differentiate us from our competitors, and which will continue to allow us to best support the needs of the City of Palmer ("the City"), its committee, and its employees.

Over the course of our 2+ year partnership with the City—USI has provided strategic solutions and has made positive and significant impacts on the City's plans, while keeping your committee apprised the entire time. As your lead consultant, I have made it a personal goal to win back your trust.

One of USI's most meaningful distinctions as an insurance brokerage and consulting firm is the USI ONE Advantage®, which integrates proprietary analytical tools with a national network of highly-consultative, closely-linked professionals and technical resources to deliver local, knowledgeable, hands-on service and ongoing expertise and support. This powerful combination yields a robust set of fundamentally different benefit solutions with superior results—including meaningful bottom line financial impact for our clients.

Leveraging the power of the USI ONE Advantage®—and working at all times to promote the City's interests and to help achieve your objectives—your dedicated USI team will continue to:

- Advocate for your interests by maximizing local, regional and national resources and influence;
- Protect the interests of the City as they relate to compliance, claims dispute resolution and carrier demands;
- Collaborate with you to develop both short and long-term strategic solutions based on evidence, analytics, negotiation and education;
- Offer proactive, creative and timely solutions aimed at controlling costs, alleviating workload pressures placed on HR professionals, educating employee groups and exploring cost-containment measures which save the City money without having to pass expenses on to its employees;
- Present integrated solutions—including wellness programs and creative plan design options—to manage the health risk of your population;
- Leverage the strength of our large book of business throughout the bid and renewal negotiations process in order to procure the very best administrative, claims cost and customer service commitments from carriers and vendors;
- Guide the City as it navigates the health and welfare benefits industry— as well as the ongoing COVID-19 pandemic and Health Care Reform—ensuring that all programs and practices are up to date and compliant; and
- Provide the City with a competitive, transparent consulting and brokerage arrangement with no hidden fees or surprises.

1. SUBMISSION REQUIREMENTS

1.0 The complete original proposal must be submitted in a sealed package and received in accordance with the instructions detailed in this RFP. All proposals shall be marked RFP No. 22-02HR – Employee Health and Supplemental Insurance Broker Services. Proposers shall file all documents necessary to support their proposal and include them with their proposal. Proposers shall be responsible for the actual delivery of proposals during business hours to the address indicated in this RFP; electronic submissions will not be accepted. It shall not be sufficient to show that the proposal was mailed in time to be received before scheduled closing time.

USI has followed all steps in the City’s RFP and delivered hardcopies to the City.

1.1 Proposal Format: Proposals shall be submitted in the following format and include the following information:

- a) Detailed description of services as described within each Scope of Services as requested
- b) Fee Proposals per instructions in Section III signed by responsible party
- c) Contact names of references with phone numbers
- d) Any additional information pertinent to the proposal

USI has provided the above information throughout our proposal and has signed all required forms.

1.2 It is the sole responsibility of the PROPOSER to assure that they have received the entire Request for Proposal (RFP).

USI has received the entire RFP and the Addendum items from the City.

1.3 Proposers will be notified via the City of Palmer’s website (<https://www.palmerak.org/hr/page/request-proposal-insurance-brokerage-services>) of any change in the specifications contained in this RFP.

USI has received the entire RFP and the Addendum items from the City.

1.4 No verbal or written information which is obtained other than through this RFP or its addenda shall be binding on the City of Palmer. No employee of the City of Palmer is authorized to interpret any portion of this RFP or give information as to the requirements of the RFP in addition to that contained in or amended to this written RFP document.

USI agrees.

1.5 Right of Rejection and Clarification: The City of Palmer reserves the right to reject any and all proposals and to request clarification of information from any proposer. The City of Palmer is not obligated to enter into a contract based on any proposal submitted in response to this document.

USI agrees.

1.6 Request for Additional Information: Prior to the final selection, proposers may be required to submit additional information which the City may deem necessary to further evaluate the proposer’s qualifications.

USI agrees to provide additional information to the City.

1.7 Denial of Reimbursement: The City of Palmer will not reimburse proposers for any costs associated with the preparation and submittal of any proposal, or for any travel and/or per diem costs that are incurred.

USI agrees.

1.8 Gratuity Prohibition: Proposers shall not offer any gratuities, favors, or anything of monetary value to any official, employee, or agent of the City of Palmer for the purpose of influencing consideration of this proposal.

USI agrees.

1.9 Right of Withdrawal: A proposal may be withdrawn and resubmitted if done prior to the deadline as listed in the RFP. Such request for withdrawal shall be in writing.

USI agrees.

1.10 Right of Negotiation: The City of Palmer reserves the right to negotiate with the selected proposer the exact terms and conditions of the contract.

USI agrees.

1.11 Right of Rejection of Lowest Fee Proposal: The City of Palmer is under no obligation to award this project to the Proposer offering the lowest fee proposal. Evaluation criteria included in this document shall be used in evaluating proposals. Award shall be made to the person determined by the City to be the best qualified and shall be for an amount of compensation determined to be fair and reasonable. If compensation cannot be agreed upon with the best-qualified person or firm, negotiations shall be formally terminated with that person. If more than one firm is determined to have submitted a qualified proposal, negotiations may be conducted with the next firm, in order of their respective qualification ranking. The contract may be awarded to the person or firm then ranked as best qualified if the amount of compensation is determined to be fair and reasonable.

USI agrees.

1.12 Business License: Palmer Municipal Code, Chapter 5.04 requires that all businesses conducting business within the boundaries of the City have a current business license issued by the City. Prior to any award because of this solicitation, the Contractor may be required to provide proof that they have a current City of Palmer Business License or proof that they have applied for one. Copies of this city code and instructions on obtaining a business license may be obtained at the Finance Department, or by calling 907- 745- 3271.

USI agrees and has provided all licenses and our certificate of insurance as *Appendix I*.

1.13 Exceptions to the RFP: Proposers may find instances where they must take exception with certain requirements or specifications of the RFP. All exceptions shall be clearly identified, and written explanations shall include the scope of the exceptions, the ramifications of the exceptions for the City of Palmer and a description of the advantage to be gained or disadvantages to be incurred by the city because of these exceptions.

USI agrees and at this time has no exception.

1.14 Indemnification: Proposer, at its own expense and without exception, shall indemnify, defend, and pay all damages, costs, expenses, including attorney fees, and otherwise hold harmless the City of Palmer, its employees, and agents, from any liability of any nature or kind regarding the delivery of these services.

USI agrees. Our commitment in this area is fully outlined in our *Client Service Agreement*.

1.15 Rights to Submitted Material: All proposals, responses, inquiries, or correspondence relating to or in reference to this RFP, and all reports, charts, and other documentation submitted by proposers shall become the property of the City of Palmer when received.

USI agrees.

1.16 Basis of Award: Proposals will be evaluated by a minimum of three (3) City of Palmer management level employees according to the following criteria and weight at a minimum:

- a) Understanding of scope and ability to provide services as requested overall clarity and responsiveness of the proposal to this RFP - 20pts
- b) Brokerage Fees – 25pts
- c) Experience and qualifications of the firm and account executive assigned to the city's account - 20pts
- d) Description of how you will handle the account/access to markets for proposed insurance– 15pts
- e) Ability to obtain an affordable benefit package that meets the needs of the city - 20pts

The city administration intends to make a recommendation for contract award to the City Council on October 11, 2022, if there is a proposal that is suitable to the needs of the city. The City Council will provide the final approval based upon what is in the best interest of the City of Palmer.

USI agrees and we have provided all of the requirements above throughout our proposal and forms.

1.17 Copies: One original and three (3) copies of the proposal and supporting documents must be submitted in response to the RFP. The fee proposal and Appendix B shall be submitted in a separate sealed envelope with each copy of the proposal (original plus three (3) copies). All responses must relate to the specifications as outlined.

We have provided one original and three copies of our proposal and supporting documents, including signed forms as *Appendix II*.

We have also provided our signed *Fee Proposal* and *Compensation Schedule* (in separately sealed envelopes).

1.18 Contacts: Questions regarding this request for proposal should be directed in to: Kimberly Green, Human Resource Manager (907) 761-1302, Email: kgreen@palmerak.org. Answers to questions submitted regarding this RFP will be shared with all proposers via the city's website <https://www.palmerak.org/bids>.

USI agrees. We have reviewed the RFP and Addendums throughout the creation of our proposal.

1.19 Submittal of Qualifications: Proposers shall submit experience and qualifications as described below. Additional information may be submitted as appropriate to further describe broker capabilities:

- a) List of clients and contact names
- b) Licensed as an insurance broker or agent in the State of Alaska, with at least 5 years of experience in providing services as outlined in this RFP
- c) Insurance coverage as outlined in the professional service agreement
- d) Ability to act as broker in procuring insurance from the city's current insurance providers

USI agrees and exceeds the qualifications set forth in the City's RFP.

1.20 Contract: The city reserves the right to negotiate final contract terms with any proposer selected. The contract between the parties will consist of the RFP, including the professional services agreement form, together with any modifications thereto, and the awarded proposer's proposal, together with any modifications and clarifications thereto that are submitted at the request of the city during the evaluation and negotiation process. In the event of a conflict in language between the documents referenced above, the provisions and requirements set forth and/or referenced in the RFP shall govern. However, the City of Palmer reserves the right to clarify any contractual relationship in writing with the concurrence of the contractor, and such written clarification shall govern in case of conflict with the applicable requirements stated in the RFP or the contractor's proposal. In all other matters not affected by the written clarifications, if any, the RFP shall govern.

USI agrees.

1.21 Assurances: By responding to this RFP, each proposer assures the city that, if selected as the city's broker, he or she will:

- a) Make a diligent effort to place all insurance requested by the city at the lowest possible price consistent with adequate breadth of coverage and stability of insurers.
- b) Advise the city of ways in which coverages proposed or provided differ from that currently in place.
- c) Broker agrees to disclose to the city all commissions he or she is eligible to receive or has received from insurers providing coverage to the city under this contract. Whenever the broker must receive commission from an insurer such commissions must be returned to the city or reduce the fixed fee in an equal amount. If the cost of the policy is the same with or without a commission, the broker will take the commission and return it to the city or reduce the fixed fee in an equal amount.
- d) Not assign or transfer the city's account, or any portion of the city's business, without the city's prior written approval.
- e) Fully disclose to the city all quotes received from insurers, always acting in the city's best interest.
- f) Comply with all provisions of this RFP and their proposal throughout the term of appointment.

Matt Lewis and USI agree to all of these items as the City's broker, consultant and partner.

1.22 Execution of Agreement: The proposer whose proposal is accepted shall execute the Agreement and furnish the required insurance within ten (10) working days after council approval of the award. The Agreement shall be considered executed by the successful proposer when an authorized representative of the proposer signs the Agreement, and the insurance certificate(s) are received by the Human Resource Manager. Failure or neglect of the proposer to execute the Agreement within the time specified may result in the award of the Agreement to the next lowest proposer.

The city will execute the Agreement within ten (10) working days after execution by the proposer as set forth above. The date the Agreement is executed by the city is the Agreement Date. The rights of the obligations provided for in the Agreement shall become effective and binding upon the parties on the Agreement Date.

USI agrees.

1.23 Proposer's response to this RFP shall constitute an agreement to all terms and conditions specified in the RFP, including, without limitation, the Professional Services Agreement form and all terms and conditions therein.

USI agrees.

1.24 Proposer understands and acknowledges that the representations above are material and important and will be relied on by the city in evaluation of the proposal. Any proposer misrepresentation may be treated as fraudulent concealment from the city of the true facts relating to the proposal.

USI agrees.

1.25 All interested and qualified proposers who meet the requirements of the RFP will be considered.

USI agrees.

1.26 The city is an equal opportunity employer and complies with Title I of the American with Disabilities Act. Proposers who need accommodation to respond to this RFP may call the Human Resources at 907-761-1302.

USI agrees.

1.27 Protests: Protests will be handled in accordance with Palmer Municipal Code 3.21.290

USI agrees.

1.28 Schedule: The dates listed below are estimates and subject to change without notice.

Request for Proposal Issued: August 19, 2022

Proposals Due: 2:00 pm September 16, 2022

Council Decision: October 11, 2022

USI agrees to the dates outlined above and the City's rights to change without notice.

2. SCOPE OF WORK

This table below, and continued on the following pages, illustrates the alignment of USI’s capabilities, experience and expertise with the City’s requested **Scope of Work**, as detailed in **Section II** of your RFP. As your broker and consultant, USI provides all of these services, and more.

2.0 The scope of work provided by the broker shall include the following, but is not limited to:	USI Agrees to Provide All Scope of Services
<ul style="list-style-type: none"> In advance of expiration date and/or anniversary date of each policy, Broker of Record shall research and evaluate all markets, including present insurer(s), and apprise the city, well in advance of expiration and/or anniversary, or coverage availability, choices, costs, recommendations, change in terms and conditions, status of insurer(s), etc. 	<p>USI will continue to research and evaluate all markets, including present insurers, apprising the City of expiration, anniversary, coverage availability, costs, choices, recommendations, change in terms and conditions, and status of insurers, well in advance of expiration date and the anniversary date of each policy.</p>
<ul style="list-style-type: none"> Submit written comparison of benefits and pricing between current program and prospective plans to the Human Resource Manager and make recommendations. 	<p>As your broker and consultant, Matt Lewis and his USI service team will submit written comparisons of benefits and pricing between prospective plans and the City’s current programs to the City’s HR Manager and we will continue to make sound recommendations.</p>
<ul style="list-style-type: none"> Inform the Human Resource Manager of changes in insurance market conditions, status of insurers, legislative activity, and laws as these may affect the City of Palmer. 	<p>The City’s USI team will continue to inform you on changes in insurance market conditions, status of insurers, compliance and legislative activity including laws as they may affect the City. The individuals that make up USI’s employee benefits practice don’t simply report on and react to industry trends—they identify them, get out in front of them and develop proactive solutions to address them. Our in-house technical resources are dedicated to staying on top of the latest industry trends, and to helping us provide the City with consistent, timely materials that highlight and support opportunities to refine, streamline or enhance your benefit plans.</p>

2.0 The scope of work provided by the broker shall include the following, but is not limited to:	USI Agrees to Provide All Scope of Services
<ul style="list-style-type: none"> • Seek information from the insurance industry and other sources regarding the availability of products, coverage, rating information, licensing data, etc., which may assist and/or affect the city. 	<p>USI frequently invites carriers, companies and vendors to demonstrate their newest products and services, which offers us the opportunity to ask questions and test products thoroughly before we quote and offer them as an option to our clients. Further, to stay up-to-date on marketplace standards, as well as new services and technology available in benefits strategy and administration, we routinely and actively engage with the variety of associations and organizations in which we maintain membership, including: The American Benefits Council; The Council of Insurance Brokers; Checkpoint; The Society of Human Resource Management (SHRM); International Foundation of Employee Benefit Plans (IFEPP); Employee Benefit Institute of America (EBIA); Employee Benefit Research Institute (EBRI); Benefits Link, to name a few.</p>
<ul style="list-style-type: none"> • When marketing coverage, research markets and submit specifications to licensed prospective insurers at least 90 days before expiration of current coverages ends. 	<p>The City's USI team will continue to work closely with you to develop and refine appropriate bid specifications in a timely manner—targeting the products, services and qualities you most require—and to solicit proposals from the carriers and service providers which will best be able to meet the City's specific criteria and objectives.</p> <p>We remain committed to helping the City locate and secure the specific services that best align with your needs and objectives, as well as those of your Employee Benefit Plan and its participants. In addition to helping prepare bid specifications and solicit proposals, we assist in evaluating vendor responses to determine which partners represent the best match for the City.</p>

2.0 The scope of work provided by the broker shall include the following, but is not limited to:	USI Agrees to Provide All Scope of Services
<ul style="list-style-type: none"> Oversee implementation of insurance carrier changes, if any, including but not limited to: re-enrollment (if necessary), employer application submission, summary of coverage preparation (if necessary), employee application submission, summary of educational meetings required, assist in proofing any master policies and employee certificates, assist in procuring ID cards (if applicable) and credit for deductible payments already made by the employee(s). Overall, seeing to it that the new insurance carrier meets established deadlines worked out in advance for all stages and steps of transition. 	<p>The City's USI service team will continue to provide all of these services. Our vendor management philosophy is based upon the creation of an open and interactive relationship with the City's carriers and other partners — an approach we feel facilitates the best possible experience for the City and your plan participants. In support of our approach, we require strong, proactive account management from your vendor partners and expect them to have routine conversations with us about their products, offerings and ongoing service. In addition, our strategy includes targeting the City's desired areas of improvement for each individual carrier/vendor. As an independent broker, USI sits on every major national and local insurance company's broker advisory panel, we have direct, ongoing, senior-management-level dialogue with carriers regarding policy, service, and client experiences. And, when necessary, our size, reputation, and standing allow us to take an assertive — but respectful and professional — position with vendors to advocate or intervene on the City's behalf. We consider monitoring the performance and service levels of your insurance carriers and other vendors to be an essential component of the services we perform, and we ensure that our recommendations can meet the financial and service obligations of the City.</p>
<ul style="list-style-type: none"> Assist the city with any claim billings, administrative, regulatory compliance requirements or other problems that may occur during coverage periods. 	<p>USI's in-house technical resources and Matt Lewis will continue to assist the City with claim billings, administrative and regulatory compliance requirements (and any other challenges) that may occur during coverage periods. Matt Lewis works closely with all of USI's in-house specialists.</p>

2.0 The scope of work provided by the broker shall include the following, but is not limited to:	USI Agrees to Provide All Scope of Services
<ul style="list-style-type: none"> • Provide estimated expenditures for employee benefit programs to the city in time for fiscal year budget submissions as required (annually before November 1st). 	<p>The City's USI team will provide estimated expenditures for its employee benefit programs to the City in time for fiscal year budget submissions as required (annually before November 1st).</p>
<ul style="list-style-type: none"> • Review year-end settlements from insurance carriers, if any. 	<p>Matt Lewis and the City's USI service team will review year end settlements from insurance companies, and we will discuss details with the City.</p>
<ul style="list-style-type: none"> • Provide, after fiscal year ends, a commission settlement and make final reparation to city if commissions exceed agreed upon fee within 30 days of calculation. 	<p>We are fully committed to acting in our clients' best interests, and that commitment extends to transparency with respect to commissions paid to USI by the carriers providing coverage to the City. Any and all commissions paid to USI for policies placed on the City's behalf will be disclosed—by line of coverage written—to the City. In addition, we will disclose whether we have a contingent income relationship with any of your carriers. In addition, USI's Code of Business Conduct prohibits any employee from accepting gifts of any kind from carriers. While appropriate business entertainment can be a typical part of many companies' operations, our Code of Conduct expressly prohibits the acceptance of third-party paid travel that is not part of a business meeting or conference/seminar.</p>
<ul style="list-style-type: none"> • Periodic review of city employee insurance and benefit coverage and loss data for purposes of making recommendations to the city with respect to the need for ancillary insurance services, additional insurance coverage and modifications, updating or upgrading of existing coverage(s). 	<p>USI conducts ongoing reviews of the City's coverages and loss data and has the expertise to help the City with preferred pricing, terms and conditions for ancillary benefit programs such as group and voluntary dental, life and disability. We partner with several insurance carriers to offer proprietary products and coverage features that will enhance the City's overall benefits package as well as help retain and attract employees. USI reviews benchmark data, claim data</p>

2.0 The scope of work provided by the broker shall include the following, but is not limited to:	USI Agrees to Provide All Scope of Services
	and trend information to help identify areas for improvement and to compare current benefits to the competition. USI's Ancillary Benefit program management includes Dental; Life; Disability; and Voluntary Benefits. Our holistic approach to ancillary benefits drives improved outcomes by defining client needs; engaging in competitive program marketing to find best-in-class vendors and carriers and secure superior discounts; establishing performance goals; and, monitoring results with a focus on maximizing value and employee satisfaction. Our goal is to provide aggressive negotiation and strategic plan design for the City.
Other Conditions:	USI Agrees to Provide All Scope of Services
<ul style="list-style-type: none"> • Apprise the Human Resource Manager of changes in the status of all licensing, including whether representation of an insurer of city coverage has terminated or whether any disciplinary action is pending before a regulatory agency. 	USI agrees to keep the City apprised of all items within the City's "other conditions".
<ul style="list-style-type: none"> • Advise on any substantive complaints received from persons covered under the city's insurance programs. 	USI agrees to assist the City with substantive complaints as outlined within the City's "other conditions".
<ul style="list-style-type: none"> • Broker of Record shall perform all duties and responsibilities usual to those of an insurance agent, broker, certified insurance consultant, including duties and responsibilities usual to all other licenses required in the transaction of business on behalf of the City of Palmer. 	USI agrees to continue to perform all of the duties and responsibilities as the City's broker and consultant and maintains all of the licenses and credentials required.

2.1 CONTRACT PERIOD

Contract Period: Proposals should assume the initial contract term of one year with an effective date of February 1, 2023. The contract may be renewed up to three additional years at the sole discretion of the city.

USI agrees to the City's contract terms.

2.2 SUBMITTAL OF QUALIFICATIONS

Proposal format should follow these basic guidelines for each category of service submitted as a response to this RFP. For each item in this section, please provide a statement regarding the firm's ability to meet the criteria.

2.2.1 Describe in detail the qualifications of the firm and the company personnel to whom the task would be assigned as well as any back up personnel. Details should include:

- a) **Familiarity and years of service to municipal and local government clients**
- b) **Detail of past work performance including size of entity**
- c) **Names of assigned personnel and their function with relation to this proposal**
- d) **Experience, education, and training of assigned personnel with particular regard to public entity experience**

a. USI's Public Sector Client Experience

The City's lead benefits consultant, **Matthew Lewis**, brings 27 years of industry experience and currently consults on 10 Alaska-based public sector groups, including the City of Palmer. He is also the agent of record for several more non-public sector clients based in Alaska. **Erin McNally**, the City's Senior Account Manager, serves 6 municipalities and 8 school districts, with all 14 of those clients based in Alaska.

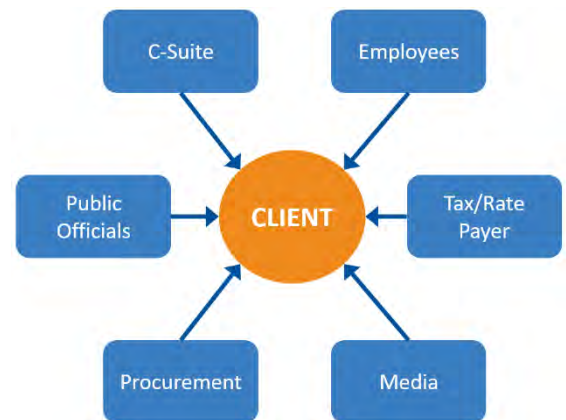
Nationally, USI serves 800+ public sector clients and 100 of those clients are served here by our offices in the Northwest. 24 of those clients are based in Alaska.

USI's Focus on the Unique Needs of Public-Sector Clients

Through our experience with public-sector clients both here in the Pacific Northwest and nationwide, we understand that there is a dual responsibility to constituents and employees. This primary public responsibility drives all our recommendations and solutions.

Additionally, we understand the importance of industry segmentation and how critical it is to our clients. Our **Public Entity Industry Segment** team takes a holistic approach to managing your risk and can unite groups throughout your organization.

Our local account team draws on the resources of this group to develop industry strategies and solutions to complex situations. They work to bring "best in front" results to the City.



Industry Strategies & Solutions for All Facets of the Public-Sector

We take the time to understand your operations, culture, and strategic direction; then tailor the right insurance solutions for the City's specific needs. Available solutions include:

- Analysis and forecasting
- Network security and data privacy
- Claims management
- Customized employee and retiree benefit communications
- Development of successful city purchasing pools providing group insurance programs
- Administration support
- Design and implementation of cost-saving alternatives (HSAs, HRAs)
- GASB 43 & 45 compliance and funding solutions
- Population Health Management solutions
- Extensive labor union expertise, education for unions on health care benefit trends

b. Detail of past work performance including size of entity

The City's lead consultant, **Matt Lewis** handles many public sector and municipality clients within his book of business, 10 of which are based in Alaska. These clients range in size from under 50 enrolled to over 500 enrolled subscribers.

One such client is the Ketchikan Gateway Borough and School District. While they are a bit larger than the City of Palmer, at ~350 enrolled employees, they certainly share many of the same challenges of other municipalities in the state of Alaska.

Client examples of highly successful consulting recommendations

Ketchikan Gateway Borough and School District was running quite badly with a lot of high claimants and ongoing worsening conditions. Upon a deeper dive utilizing the analytics and underwriting teams at USI, Matt uncovered that diabetic and hypertension claims were making up over \$2 million of the annual spend.

Matt then worked with the carrier Meritain to get a quote for a point solution called *Livongo*, who specialize in targeted improved outcomes for both diabetes (keep insulin compliant and monitor blood sugar ranges) and hypertension (provide monitoring devices wirelessly connected to an outreach team in case of emergent situations/readings).

One year after implementing the *Livongo* program, the claims for these two conditions dropped by over \$1 million and those members who enrolled in the program (about 65% of those who were contacted), raved about their personal experience and became ambassadors internally for the 35% that would also benefit from joining.

Another client, **the City of Sitka**, with approximately 120 employees and fully insured, received a large but justified increase at their last renewal (north of 25%).

Matt marketed to a few available competitors that have and do business in Sitka, but with largely unfavorable results as neither option was coming in aggressively for this poorly running group. Using his years of experience on the insurance carrier side of the business, Matt was able to break down the renewal offer and find some questionable underwriting by the incumbent carrier.

Matt also discovered that a few of the large claims were not ongoing in nature, so should be discounted going forward. Using this institutional knowledge and leveraging the very large book of business with this well-known carrier in Alaska, Matt was able to get the renewal down from 25%+ to 9% on the medical plan and negotiated a no-change on the dental plan. This saved the client \$451,000 from the initial renewal offer.

These are examples of the type of work Matt is known for and how seriously he takes his obligations. Matt always puts his clients' needs first and because of that, enjoys many long-term relationships and several that have evolved into friendships.

USI's In-House Technical Resources

The team of individuals assigned to the City's account is comprised of professionals seasoned in serving clients in the government/public sector — and those providing benefits to employees and retirees alike.

USI has been an innovator in developing and implementing creative plan solutions to meet the employee benefit coverage needs common to public-sector organizations. Developing the strongest, most relevant, and best-in-class insurance solutions for our clients starts by being a good listener. That is why we take the time to better understand the needs of our clients, stay on top of evolving industry trends, and ensure we're charting the right course. Our in-house USI National Compliance Team, our Underwriting & Analytics Team, and our Population Health Management professionals are just some of the thought leaders that help USI, and our clients, stay up-to-date with trends, benchmarking, best practices, and latest developments.

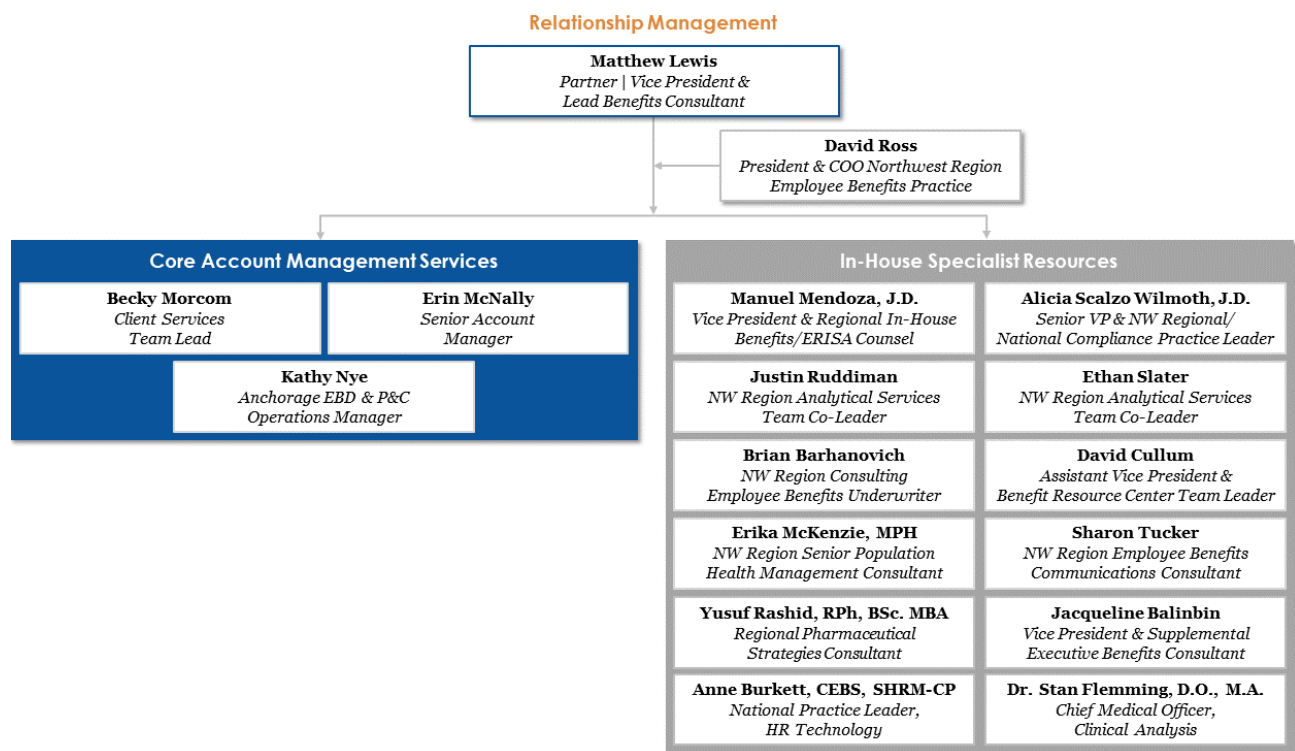
c. Names of assigned personnel and their function with relation to this proposal.

An Anchorage-led team, with support from Seattle, will continue to provide all services to the City, engaging additional appropriate local, regional and national resources on an as-needed basis in order to fulfill the City’s scope of services comprehensively.

Matthew Lewis, Vice President, serves as the City’s USI Team Lead, with overall responsibility for the relationship and provides the City with strategic planning and guidance, as well as the coordinated deployment of in-house analytical and compliance resources. Matt currently consults for 10 public sector clients. **Becky Morcom** serves as Client Services Team Lead, bringing additional leadership and general oversight to your account management team, **Erin McNally** serves as the City’s **Senior Account Manager**, and collaborates with Matt and Becky to address your day-to-day needs. **Kathy Nye** serves as our Anchorage office’s Employee Benefits and Commercial Insurance Operations Manager and **David Ross**, President and Chief Operating Officer, is responsible for Northwest business planning, day-to-day operations, sales and client account management. **Justin Ruddiman**, Senior Benefits Analyst, is responsible for reviewing and analyzing emerging trends in medical inflation, marketing lines of coverage to top carriers in the market and finalizing all plan changes and renewals. He is also charged with modeling employee contribution scenarios for the City.

Your USI account service team takes an active and leading role in working directly with the City to address administrative issues, answer questions and solve problems. In addition, your HR staff—as well as your covered employees and their dependents—have access to the information and claims resolution services provided by the benefits specialists in the Benefit Resource Center.

The City’s USI service team structure is reflected in the org chart below and our in-house technical resources are continued on the following page.



The City’s USI account team also draws upon the extensive specialist knowledge and insight of these in-house and regionally-based resources:

- Regional Benefits/ERISA Counsel, **Manuel Mendoza, J.D.**
- Benefits Counsel & National/NW Region Compliance Team Leader, **Alicia Scalzo Wilmoth, J.D.**
- NW Region Analytical Services Team, led jointly by **Justin Ruddiman & Ethan Slater**

- NW Region Consulting Employee Benefits Underwriter, **Brian Barhanovich**
- The Benefit Resource Center, led by **David Cullum**
- NW Region Senior Population Health Management Consultant, **Erika McKenzie, MPH**
- NW Region Employee Benefits Communications Consultant, **Sharon Tucker**
- NW Region Pharmaceutical Strategies Consultant, **Yusuf Rashid, MBA, RPh, BSc.**
- Supplemental & Executive Benefits Consultant, **Jacqueline Balinbin**
- National Practice Leader, HR Technology, **Anne Burkett, CEBS, SHRM-CP, PHR**
- NW Region Chief Medical Officer, **Dr. Stan Flemming, D.O., M.A.**

Please refer to *Appendix III* for complete bios—including those of the specialist resources mentioned above—further detailing each team member’s role, tenure, credentials and qualifications.

d. Experience, education, and training of assigned personnel with particular regard to public entity experience.

USI—and the City’s core USI team, specifically—has an extensive track record of working successfully with a wide variety of public entities. Clients include county governments, cities and towns, public utilities, airports and bus/rail transportation systems and State DOTs, as well as specialized governmental agencies representing law enforcement, joint power authorities, tribal and native corporations and school districts. We understand public and governmental entities continue to face new and evolving challenges, even as you’re charged with carrying out your missions and operations within finite budgetary requirements.

Several members of the City’s USI service team have extensive Public Entity client experience—a collective 160 years. They have helped Public Entity clients reduce costs, attract and retain talent, improve employee health, etc.

The City’s USI account service team brings broad experience and substantial success in supporting Public Entity clients through:

- Benchmarking
- Carrier reviews and negotiations
- Pre-underwriting renewals
- Improving access to care via online and telehealth partnerships
- Alternative funding analysis
- Complex ACA and DOL Compliance
- QHDHP Strategies
- Employee Assistance Programs (EAP)

The City’s current USI team is made up of professionals with diverse and wide-ranging expertise, as well as backgrounds in serving both public entity and private corporate clients. Each team member brings unique experience and perspectives to the service of the City’s account.

Through their close collaboration, **Matt Lewis** and his dedicated team deliver a spectrum of options, solutions and approaches—reflective of their individual proficiencies and insights—for the City’s consideration. We believe our collective team expertise and comprehensive experience both distinguishes us from our competitors and will continue to provide significant value to the City.

2.2.2 References with names, addresses, and phone numbers of current clients who can be contacted by the city for discussion of services provided to that client.

The City is invited to contact the references below. Each reference has one or more characteristics in common with the City and can also speak to the overall quality of **Matt Lewis** and USI as a brokerage and consulting partner.

Ketchikan Gateway Borough

Contact: Cynna Gubatayao, Finance Director | 📞 (907) 228-6625

Address: 1900 First Avenue | Ketchikan, AK 99901

Ketchikan Gateway Borough School District

Contact: Katie Parrott, Business Manager | 📞 (907) 225-2118

Address: 333 Schoenbar Road | Ketchikan, AK 99901

Park County, WY

Contact: Colleen Renner, County Clerk | 📞 (307) 527-8600

Address: 1002 Sheridan Avenue | Cody, WY 82414

City of Unalaska/Iditarod Area School District/Unalaska City School District (Alaska Public Employees Insurance Group Trust)

Contact: Tracey Davis, Plan Administrator | 📞 (503) 485-2482

Address: PO Box 610 | Unalaska, AK 99685

Galena City School District

Contact: Greg Culbert, Assistant Superintendent | 📞 (907) 227-4184

Address: PO Box 299 | Galena, AK 99741

The Northwest Company International

Contact: Stacy Sawyer, HR Director | 📞 (907) 947-2012

Address: Old international Airport Road | Anchorage, AK 99502

2.2.3 Any additional remarks/comments the company wishes to make to elaborate their proposal and qualifications.

An Anchorage and Seattle-led team will continue to provide all proposed services to the City, engaging additional appropriate local, regional, national and international resources on an as-needed basis in order to fulfill the City's scope of services comprehensively. As a national network of brokerages, USI has access to a comprehensive range of products and services, while our local offices and long-standing ties to the communities in which we live and do business allow us to offer a level of client focus and knowledge that's frequently more closely associated with regional boutique firms.

The City of Palmer's USI Servicing Offices

About Our Anchorage Office



USI's Anchorage office has been serving businesses and organizations in Alaska and beyond for more than a decade. Our professionals design and deliver employee benefits and commercial insurance strategies and solutions for more than 1,600 Alaska clients.

About Our Seattle Office



Founded in 1972 as Kibble & Prentice, USI's Seattle office began as a small, local firm offering life insurance and estate and business succession planning, as well as private client services. Since then, we've grown into one of the largest full-service brokerage and consulting firms in the Pacific Northwest. We are ranked among top firms in the Puget Sound region in terms of premium volume (\$1.4 billion in 2021), according to the Puget Sound Business Journal in March 2022.

USI's Employee Benefits Practice

USI is the 2nd largest privately-held benefits broker as ranked by global benefits revenue¹. At the national level, USI currently helps over 12,200 clients with the strategic implementation and ongoing management of their employee health and welfare benefit plans.

USI's Northwest Region Employee Benefits Division is composed of executive leadership; benefits counsel; wellness consultants; benefits underwriters and analysts; benefits specialists; pharmacy consultants, supplemental and executive benefits consultants, employee communications consultants, benefits consultants; account managers and administrative support personnel—all of whom bring their unique expertise to serving our clients' accounts.

¹ Business Insurance, 2022 Agents and Brokers Rankings + Directory (Largest Benefits Brokers).

Nationally speaking, USI's Employee Benefits team includes hundreds of consultants across the country who are supported by local and regional account managers, healthcare underwriters, business analysts, compliance attorneys, wellness directors, pharmacy consultants, communications experts, claims experts and other specialty services professionals. These experts, in turn, are supported by sophisticated tools and proprietary processes driven by our national benefits practice. This model combines the knowledge of highly-qualified consultants with national resources and the high-touch, personalized services of a local agency focused on offering unique solutions to drive better value for the City.

Our Employee Benefit practice focuses on seven primary service areas:

1	2	3	4	5	6	7
Underwriting & Analytics	HR Services	Population Health Management	Compliance/ Healthcare Reform	Care Intervention	Pharmacy	Ancillary Benefits
Negotiation and management to contain plan costs	Administration platforms, call centers, and service calendars to ease your administrative burdens	Wellness design, disease management analysis, and aligned incentives to improve health	Tools, expert guidance, and policies to promote compliance with federal and state regulations	Options for members to make more efficient care decisions without sacrificing quality	Solutions to increase transparency and minimize pharmacy costs	Competitive marketing and scoring drives results for other plan services

Our expertise, resources and market presence enable us to design unparalleled plans, negotiate advantageous pricing, deliver preferred services and keep you abreast of market changes. We offer a comprehensive breadth of solutions with measurable impacts that help our clients leverage their employee benefit offerings to attract talent, improve retention and grow earnings, while also controlling costs.

A Team Approach, Inclusive of In-House Technical Resources

As discussed above, USI has assembled and deployed regionally-integrated, in-house teams of subject matter experts to support our local consultants and account service teams, as well as our clients' plans. Our Compliance, Population Health Management/Wellness, Underwriting/Analytics, Employee Communication, Claims Advocacy/Benefit Inquiry Call Center, Pharmacy, and other technical resources are USI employees—not retained or outsourced consultants. In addition, the vast majority of the services provided by these resources are included in our proposed compensation, and not billed to clients on an hourly or per-project basis.

This approach not only allows clients and their employees to feel comfortable contacting us—as we invite and encourage them to do—at any time, without the worry of incurring additional fees, but also fosters a unified approach to your benefit plan strategy, as compared to the “patchwork” methodology derived from disparate resources. The members of your USI team, including the in-house subject matter experts and technical resources mentioned above, are in regular, on-going conversation with one another about both new and emerging developments in the employee benefits space and specific strategies and deliverables to assist clients in navigating these developments, as well as challenges unique to their individual plans and employee populations.

Corporate Social Responsibility

We believe we further distinguish ourselves as a valuable partner through our corporate social responsibility and diversity, equity and inclusion initiatives.

USI strives to be a proactive, supportive, diverse and sustainable business for our clients, employees, community, suppliers and the environment through a variety of established, company-wide programs and initiatives, including corporate social responsibility program, [USI Gives Back](#); diversity and inclusion platform, [I'm With U](#); employee financial assistance program, [USI Cares](#); educational scholarship program, [USI Educates](#); and environmental initiative, [USI Green](#). Please click the hyperlinks in the text above for additional details on each program.

An Award-Winning Brokerage

USI has frequently been recognized by insurance industry and other business publications and organizations for our workplace culture, industry innovation, corporate social responsibility and employee communication initiatives, among other accolades. Highlights include:



USI's Employee Benefits Brokerage & Consulting Services

Our comprehensive suite of “standard” employee health-and-welfare-benefits-related services is detailed below. This list can be further augmented and refined with the City to support the unique circumstances and requirements of your plan, and the final scope of services are included as a part of the *Service Agreement* between our organizations.

Underwriting & Analytics

Our underwriting and analytics solutions integrate superior assessment, analysis and benchmarking with expert market negotiation to identify and increase transparency around insurers’ profit sources.

- 100+ In-house Financial Analysts and Underwriters Nationwide
- Renewal Projections & Funding Analysis
- Claims Cost and Risk Assessment
- Trend Mitigation
- Plan Design & Contribution Analysis
- Benchmarking
- Predictive Modeling
- Ancillary Analysis
- International Exposure Analysis

HR Services

Our suite of Human Resource solutions below will continue to improve employee experience, alleviate burdens from the HR team, drive efficiency and ensure accountability.

Account Management

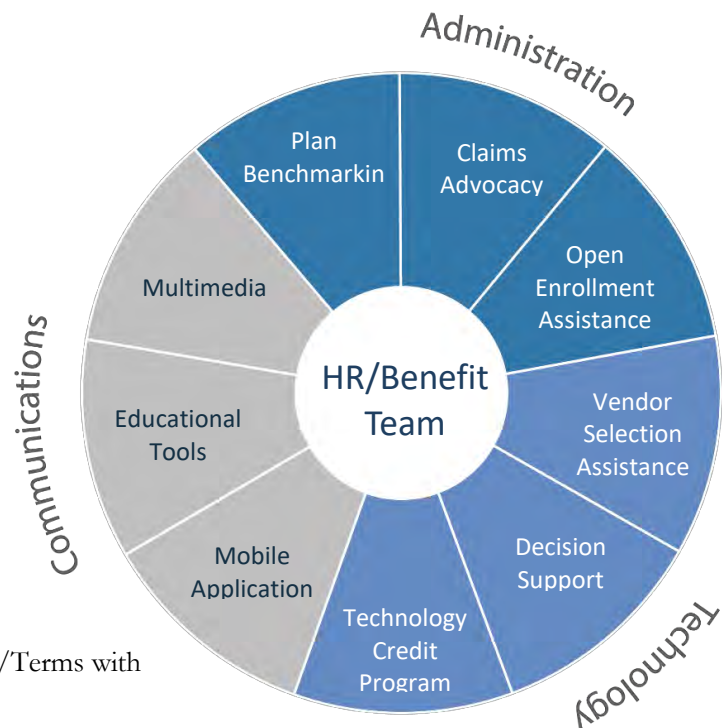
- Service Calendar
- Implementation & Project Timelines
- Employee Hotline
- Carrier Interaction and Accountability
- Coordinate USI Team

Employee Education Services

- Employee Communications — Guidebooks, Meetings, Webinars
- Enrollment Strategies
- Customized Campaigns

HR Technology

- National Team Dedicated to Matching Clients with Appropriate Technology (Human Capital Management, Benefits Administration, ACA Reporting, etc.)
- Preferred Partnerships & Special Pricing/Terms with Vetted Vendors
- Technology Credit Program to Reduce Costs of Implementing a Benefit Administration Program/Platform



Benefit Resource Center

Our Benefit Resource Center (BRC) provides individualized support for employee benefit plan interactions.

- BRC Benefits Specialists provide resolution for elevated claims, billing and eligibility issues:
 - Answer benefit plan/policy questions
 - Assist with eligibility and claim problems with carriers
 - Provide claim appeals information and process
 - Explain allowable family status election changes
- HIPAA-compliant
- All inquiries documented in a call tracking system
- Utilization reports generated quarterly

Population Health Management

A health-promoting environment attracts top talent, reduces medical costs and absenteeism. Our Population Health Managers evaluate data and recommend solutions that improve employee health status.

- Team of Locally-Based, Nationally-Networked Wellness Consultants
- Strategies to Improve Engagement
- Wellness Program Feasibility Analysis
- Program Design, Implementation & Reporting
- Targeted Communications to Improve Engagement
- Predictive Modeling & Large Claims Analysis
- Disease Management Strategies

Compliance/Health Care Reform

Our National Compliance Team, including our in-house ERISA attorneys, provides expert guidance on new developments and ongoing requirements affecting health and welfare plans.

- Team of Locally-Based, Nationally-Networked Compliance Attorneys
- Compliance Checklist Review
- Monitoring of All Facets of Health and Welfare Guidance, Including Statutes, Regulations, Case Law
- Health and Welfare Plan Compliance Education
- Health Care Reform (ACA) Impact Analysis Tools
- Ongoing Articles, Workshops, and Seminars
- State and Local Benefits-Related Issues
- Compliance Guides and Sample Documents
- Assistance with Notice and Disclosure Requirements

Care Intervention

Our team of consultants and clinical experts provide detailed analysis and deploy innovative solutions to reduce health care cost without sacrificing quality of care.

- Focus on Reducing Unit Cost/Frequency for Care and Alternative Reimbursement Strategies
- Reducing Gaps/Risks in Care
- Alternative Settings of Care
- ROI Analysis and Modeling
- Constant Innovation to Reduce Cost and Improve Quality

Pharmacy

Our pharmacy tools provide cutting edge, transparent, cost management capabilities to reduce pharmacy spend and enhance employee offerings.

- Client-Specific Pharmacy Trend and Benchmark Analysis
- Performance Analysis
- USI Pharmacy Solutions/Rx Pricing Strategies
- Rx Program Management Strategies/Specialty Program Review

Ancillary Benefits

We review ancillary benefit programs to manage and measure plan effectiveness, maximize value and employee satisfaction.

Ancillary Benefit Programs

- Disability, Dental, Life, STD
- Return to Work Strategies
- Supplemental and Voluntary Plans

Managing/Measuring Vendors

- ROI on Administration Programs
- Achieving Superior Discounts
- Finding “Best in Class” Vendors and Carriers

2.3 SCOPE

Similar to the City’s requested *Scope of Work*, as previously detailed in *Section II* of your RFP, this table below and continued on the following pages further illustrates the alignment of USI’s capabilities, experience and expertise with the City’s requested *Scope*, as detailed in section **2.3** of your RFP.

Services in advising and coordinating with the City should include, but are not limited to the following:	USI Meets or Exceeds Criteria
2.3.1 Annual claim review meetings with appropriate City Staff.	Matt Lewis will meet with the City and City Staff annually to review claims.
2.3.2 Facilitate insurance company interface and coordination in the following areas: <ul style="list-style-type: none"> a) Renewal information format and market presentation b) Marketing of existing coverages c) Bid insurance contracts to assure best possible conditions and pricing 	Matt Lewis will continue to lead the coordination of the City’s insurance company(s) relationship including renewal and market presentations, marketing of the City’s coverages, and the bidding of insurance contracts.
2.3.3 Develop coverage options as agreed upon for coverages not currently in effect for the City’s review. Such review should indicate a market review of coverages for both price and conditions as well as alternatives for managing the identified risk other than a traditional insurance product where such alternatives exist.	Matt Lewis will develop coverage options agreed upon for coverages not currently in place for the City’s review. All alternative criteria will be considered and reviewed with the City.
2.3.4 Provide options for the City’s health insurance plans to include, but not limited to: Health Savings Arrangement (HSA) and/or Health Reimbursement Arrangement (HRA) and/or Section 125 plan. <ul style="list-style-type: none"> a) Proposal should include a third-party administrator to manage the Section 125 if included in the proposal as well as costs associated with such a plan. 	USI evaluates and implements consumer driven high deductible (CDHP) plans that incorporate HRAs and/or HSAs. Included within this service delivery are considerations of plan design, level, and timing of contributions and budget forecasting. In addition, we constantly look to align HSA incentives with meaningful behavior changes that allow employees to openly engage with the health plan and earn the contributions within ADA and ACA guidelines. Our benchmarking capabilities allow us to identify market-level company contributions. Our vendor partners also play a role in providing broad market insight to expected participation levels based upon employer contribution scenarios that are attached to various employee engagement strategies. Timing of incentives can vary based upon the

Services in advising and coordinating with the City should include, but are not limited to the following:	USI Meets or Exceeds Criteria
	communications roll-out of the programs. The goal of timing and targeting by the plan sponsor is also a key element in creating the cause-effect nature of the contribution in the mind of the employee.
2.3.5 The responder to this RFP must submit a proposal that includes COBRA administration to include COBRA eligibility notifications and tracking and acceptance of COBRA payments and monitoring of payments.	All members of USI’s National Compliance team have considerable experience with respect to federal continuation of healthcare coverage law (COBRA) as well as the similar state continuation laws that exist in many states. USI will provide the City with information regarding vendors who provide quality COBRA administration services. As COBRA can be the source of significant liability, it is important to ensure that notices are provide timely, with the required content, and with the proper tracking. Our National Compliance Team has prepared a variety of related materials and has significant experience in assisting clients with meeting their COBRA administration requirements.
2.3.6 Assist the city in reviewing all insurance policies and plans as needed.	Matt Lewis will assist the City in reviewing all insurance policies and plans.
2.3.7 Provide service for day-to-day contact on insurance matters.	Matt Lewis, Becky Morcom, and Erin McNally will continue to provide dedicated and day-to-day service to the City.
2.3.8 Other services as are normally and customarily required of a municipal insurance broker.	USI agrees to provide the City all services outlined in our proposal.

2.4 COMPENSATION

Each proposal must include the Fee Proposal enclosed as Section III in addition to the completion of Appendix B. Compensation will be in the form of a fixed fee. The broker agrees to return all commissions received to the City of Palmer or make other arrangements with the carriers to reduce the premium by the amount of the commission. The City will pay the fee prior to April 30 of each contract year.

Please see *separate sealed envelopes* for both USI's completed and signed *Section III Fee Proposal* and *Appendix B, Compensation Schedule* documents. USI agrees to provide documentation of the companies solicited and their bids on an annual basis.

DISCLOSURES

CONFIDENTIAL AND PROPRIETARY: This document and the information contained herein is confidential and proprietary information of USI Insurance Services (“USI”). Recipient agrees not to copy, reproduce, or distribute this document, in whole or in part, without the prior written consent of USI. Estimates are illustrative given data limitation, may not be cumulative, and are subject to change based on carrier underwriting.

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Compensation disclosure

Information concerning our fees

As a licensed insurance producer, USI is authorized to confer with or advise our clients and prospective clients concerning substantive benefits, terms or conditions of insurance contracts, to sell insurance and to obtain insurance coverages for our clients. You have agreed to pay compensation to USI, for the placement of insurance, pursuant to a written agreement. We may also receive from insurers and insurance intermediaries (which may include USI affiliated companies) additional compensation (monetary and non-monetary) based in whole or in part on the insurance contract we sell, which is contingent on volume of business and/or profitability of insurance contracts we supply to them and/or other factors pursuant to agreements we may have with them relating to all or part of the business we place with those insurers or through those intermediaries. Some of these agreements with insurers and/or intermediaries include financial incentives for USI to grow its business or otherwise strengthen the distribution relationship with the insurer or intermediary. Such agreements may be in effect with one or more of the insurers with whom your insurance is placed, or with the insurance intermediary we use to place your insurance. You may obtain information about the nature and source of such compensation expected to be received by us, and, if applicable, compensation expected to be received on any alternative quotes pertinent to your placement upon your request.

APPENDICES

APPENDIX I: USI'S LICENSES & CERTIFICATE OF INSURANCE

MATTHEW GARRY LEWIS
 10006 MARY AVE NW
 SEATTLE WA 98177

State of Alaska Insurance License

License No: 58454 NPN: 5756654


MATTHEW GARRY LEWIS
 601 UNION ST STE 1000
 SEATTLE WA 98101-4064

This is to certify that pursuant to requirements of the Alaska Division of Insurance Code the above named is qualified to do business in the state of Alaska with the authority listed below.

CLASS	ISSUE DATE	EFFECTIVE DATE	EXPIRE DATE	LINES OF AUTHORITY
Insurance Producer	11/21/2006	01/01/2021	12/31/2022	Health, Life

This license is expressly conditioned upon the holder being in full compliance with all of the applicable laws and requirements made under authority of the laws of the State of Alaska and as such laws and requirements may hereafter be changed or amended. Your license will expire/lapse on the above indicated date. You must renew your license prior to this date to continue transacting the business of insurance in Alaska.

For questions regarding licensing, renewal, or continuing education requirements, contact the Alaska Division of Insurance or visit <http://www.commerce.state.ak.us/insurance>


 LORI K. WING-HEIER

VOID IF ALTERED NON-TRANSFERABLE

State of Alaska Insurance License

License No: 58454 NPN: 5756654

MATTHEW GARRY LEWIS
 601 UNION ST STE 1000
 SEATTLE WA 98101-4064

This is to certify that pursuant to requirements of the Alaska Division of Insurance Code the above named is qualified to do business in the state of Alaska with the authority listed below.

CLASS	ISSUE DATE	EFFECTIVE DATE	EXPIRE DATE	LINES OF AUTHORITY
Insurance Producer	11/21/2006	01/01/2021	12/31/2022	Health, Life

This license is expressly conditioned upon the holder being in full compliance with all of the applicable laws and requirements made under authority of the laws of the State of Alaska and as such laws and requirements may hereafter be changed or amended. Your license will expire/lapse on the above indicated date. You must renew your license prior to this date to continue transacting the business of insurance in Alaska.

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 LORI K. WING-HEIER

VOID IF ALTERED NON-TRANSFERABLE



CITY OF PALMER

12/31/2022

231 W. EVERGREEN AVE., PALMER, AK 99645

ANNUAL BUSINESS LICENSE

LICENSE NUMBER

011823

THIS LICENSE IS GRANTED TO:

ISSUE DATE

EXPIRATION DATE

KIBBLE & PRENTICE HOLDING CO

01/01/2022

12/31/2022

DBA: USI INSURANCE SERVICES NORTHWEST

601 UNION ST STE 1000

NOT TRANSFERABLE

SEATTLE, WA 98101

POST AT ALL TIMES IN A CONSPICUOUS LOCATION

KIBBLE & PRENTICE HOLDING COMPANY
 601 UNION STREET SUITE 1000
 SEATTLE WA 98101

State of Alaska Insurance License

License No: 35860 FEIN: 91-1176315


KIBBLE & PRENTICE HOLDING COMPANY
 601 UNION STREET SUITE 1000
 SEATTLE WA 98101

This is to certify that pursuant to requirements of the Alaska Division of Insurance Code the above named is qualified to do business in the state of Alaska with the authority listed below.

CLASS	ISSUE DATE	EFFECTIVE DATE	EXPIRE DATE	LINES OF AUTHORITY
Insurance Producer	10/07/2004	10/28/2021	10/27/2023	Casualty, Health, Life, Property
Surplus Lines Broker	10/07/2004	10/28/2021	10/27/2023	Casualty, Property

This license is expressly conditioned upon the holder being in full compliance with all of the applicable laws and requirements made under authority of the laws of the State of Alaska and as such laws and requirements may hereafter be changed or amended. Your license will expire/lapse on the above indicated date. You must renew your license prior to this date to continue transacting the business of insurance in Alaska.

For questions regarding licensing, renewal, or continuing education requirements, contact the Alaska Division of Insurance or visit <http://www.commerce.state.ak.us/insurance>


 LORI K. WING-HEIER

VOID IF ALTERED NON-TRANSFERABLE

State of Alaska Insurance License

License No: 35860 FEIN: 91-1176315

KIBBLE & PRENTICE HOLDING COMPANY
 601 UNION STREET SUITE 1000
 SEATTLE WA 98101

This is to certify that pursuant to requirements of the Alaska Division of Insurance Code the above named is qualified to do business in the state of Alaska with the authority listed below.

CLASS	ISSUE DATE	EFFECTIVE DATE	EXPIRE DATE	LINES OF AUTHORITY
Insurance Producer	10/07/2004	10/28/2021	10/27/2023	Casualty, Health, Life, Property
Surplus Lines Broker	10/07/2004	10/28/2021	10/27/2023	Casualty, Property

This license is expressly conditioned upon the holder being in full compliance with all of the applicable laws and requirements made under authority of the laws of the State of Alaska and as such laws and requirements may hereafter be changed or amended. Your license will expire/lapse on the above indicated date. You must renew your license prior to this date to continue transacting the business of insurance in Alaska.

For questions regarding licensing, renewal, or continuing education requirements, contact the Alaska Division of Insurance or visit <http://www.commerce.state.ak.us/insurance>


 LORI K. WING-HEIER

VOID IF ALTERED NON-TRANSFERABLE

APPENDIX II: USI'S SIGNED FORMS

**SECTION IV
SUBMITTAL PAGE**

By signing below, the Proposer hereby certifies to the following:

1. The individual signing below, or the firm associated or corporation of which they are a member, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of a free competitive process in connection with this solicitation.
2. The individual signed below is authorized by the firm association or corporation to bind such association or corporation to a legal contract.
3. The individual signing below, or the firm association or corporation of which they are a member, is not debarred or suspended from doing business with the City of Palmer.
4. They are acknowledging receipt of the following Addenda Numbers (if no addenda have been issued, either leave blank or write "N/A" or "None")

(List Addenda numbers that you are acknowledging receipt of)

Addendum No. 1 and Appendix D Professional Services Agreement

USI Insurance Services Northwest

Company Name

3800 Centerpoint Drive, Suite 540

Mailing Address

Matthew Lewis

Printed (or typed) Name

Matthew Lewis

Contact Person (printed or typed)

206.661.2330

Phone Number

Matt.Lewis@usi.com

Email Address

9/7/2022

Date

Anchorage, AK 99503

City, State, Zip Code



Signature

Partner | Vice President

Title

855.216.9729

Fax Number

It shall be the responsibility of the Proposer to ensure their proposal is received at or before the date and time fixed for closing. Proposers should include the following with their proposal:

- ✓ Signed Submittal Page (acknowledging Addenda if applicable)
- ✓ One (1) original and three (3) copies of your signed proposal
- ✓ Copy of Professional License
- ✓ Instructions to Proposers & Specifications/Scope of Services

SECTION V
NON-DISCRIMINATION STATEMENT

The proposer certifies that:

- (1) No person shall be excluded from participation in, denied the benefit of, or otherwise discriminated against on the basis of race, color, national origin, or gender in connection with any bid submitted to the City of Palmer or the performance of any contract resulting there from;
- (2) That it is and shall be the policy of this Company to provide equal opportunity to all businesspersons seeking to contract or otherwise interested in contracting with this Company, including those companies owned and controlled by racial minorities, cultural minorities, and women;
- (3) In connection herewith, we acknowledge and warrant that this Company has been made aware of, understands and agrees to take affirmative action to provide such companies with the maximum practicable opportunities to do business with this Company;
- (4) That this promise of non-discrimination as made and set forth herein shall be continuing in nature and shall remain in full force and effect without interruption;
- (5) That the promises of non-discrimination as made and set forth herein shall be and are hereby deemed to be made as part of and incorporated by reference into any contract or portion thereof which this Company may hereafter obtain and;
- (6) That the failure of this Company to satisfactorily discharge any of the promises of nondiscrimination as made and set forth herein shall constitute a material breach of contract entitling the City of Palmer to declare the contract in default and to exercise any and all applicable rights and remedies including but not limited to cancellation of the contract, termination of the contract, suspension and debarment from future contracting opportunities, and withholding and or forfeiture of compensation due and owing on a contract.



Signature

09/07/2022

Date

**APPENDIX A
CITY of PALMER
REQUEST FOR PROPOSAL
EMPLOYEE INSURANCE AND BENEFIT BROKER OF RECORD
A Completed Form must be submitted with the proposal**

Question	Yes	No
Is your firm licensed in the State of Alaska?	X	
Has your firm ever been suspended, warned, or fined?		X
Is your firm currently in arrears on payments of insurance premiums to any insurance company?		X
Does your firm have two or more qualified persons to handle the City of Palmer’s account with a minimum of ten (10) years of experience in employee benefits that have a CLU or CEBS designation? (USI, as a firm, exceeds all criteria).	X	
Do you carry Insurance Agents Errors & Omissions coverage with a limit of at least \$5 million?	X	
Do you now write, or have you written within the last four (4) years at least one account in the State of Alaska with premiums over \$4 million or more? Please describe type of account and coverage involved: USI and Matt Lewis have multiple accounts in Alaska with over \$4 million in annual premium. In fact, as of this printing we are the consultants/brokers on 17 such accounts in the State. Matt Lewis currently consults on 6 of those accounts personally. Types of clients meeting these criteria are: <ul style="list-style-type: none"> • Alaska Native Corporations • Large School Districts • Large Cities and Boroughs • Private for-Profit Corporations Types of Insurance Coverages Include: <ul style="list-style-type: none"> • Medical and Prescription Drug Insurance • Third Party Administration (TPA) services • Stop Loss insurance • Dental, Vision, Life, Disability, Accident, Critical Illness Insurance • FMLA, COBRA, FSA, HSA, HRA, Sec. 125 coverages as well 	X	
Do you now or have you ever written insurance coverage for a political subdivision in the State of Alaska? (Municipality, school system, public authority, etc.) Please describe type of account and coverage written: USI has multiple clients (24) in the public/political subdivision category in Alaska. Of those 24, Matt Lewis Consults on 10 personally. These include Cities, Boroughs, School Districts, and Public Tax District Hospitals. Types of Insurance Coverages Include: <ul style="list-style-type: none"> • Medical and Prescription Drug Insurance • Third Party Administration (TPA) services • Stop Loss insurance • Dental, Vision, Life, Disability, Accident, Critical Illness Insurance • FMLA, COBRA, FSA, HSA, HRA, Sec. 125 coverages as well 	X	

<p>If appointed Broker of Record, will you prepare an annual stewardship report detailing your activities on behalf of the City, the City’s premium and loss results and include your observations and recommendations for changes in the market, coverage and other factors affecting the City’s health insurance program?</p>	<p>X</p>	
<p>Do you have an affirmative action plan in place?</p>	<p>X</p>	
<p>List below those companies you would approach for the medical, life and long-term disability insurance and your annual premium volume with each company.</p> <p>USI has a panel of 14 carriers that we market all ancillary lines of coverage with (Life/Disability/Dental/Vision). We also have a panel of Stop-Loss vendors and Third-Party Administrators (TPAs) for our self-funded clients. Some of those are listed below. Companies include:</p> <ul style="list-style-type: none"> ▪ Premera ▪ Aetna ▪ Cigna ▪ United Healthcare (UHC) ▪ Moda* ▪ MetLife ▪ Unum ▪ Mutual of Omaha ▪ SunLife ▪ Lincoln Financial ▪ Principal Financial ▪ Hartford ▪ Prudential ▪ Standard ▪ New York Life ▪ Symetra ▪ Guardian ▪ Delta Dental ▪ Vision Service Provider (VSP) <p>Please note: for the purposes of responding to RFPs, USI does not disclose premium volume with insurance companies, though it is significant with all listed, hold for MODA, as they are not financially an A rated carrier so we tend to not place much business there. Matt Lewis will discuss further in person during next meeting with the City.</p>	<p>X</p>	
<p>Do you understand that this appointment, if made, will be for a period of one (1) year with a possibility of three (3) renewals, subject to satisfactory performance as determined by the City?</p>	<p>X</p>	
<p>Do you agree to disclose, in writing, all compensation received by you or your firm in connection with the placement or servicing of insurance for the City of Palmer from any source other than the City?</p>	<p>X</p>	
<p>In the event you receive access to “protected health information” (PHI) concerning the City of Palmer members while performing Broker of Record duties, do you agree not to use or disclose this PHI for any purpose other than to perform your obligations as Broker of Record or as required by law?</p>	<p>X</p>	
<p>Please expand on any reply by attachment hereto and include any other information you feel will be pertinent for consideration on your appointment as Broker of Record.</p> <p>Please see USI’s complete proposal for all information, completed forms, and services that we will continue to provide to the City.</p>	<p>X</p>	

**APPENDIX C
CITY of PALMER
NON-COLLUSIVE AFFIDAVIT OF PROPOSER**

The undersigned proposer, having fully informed themselves regarding the accuracy of the statements made herein certifies that.

- (1) the proposer developed the bid independently and submitted it without collusion with, and without any agreement, understanding, or planned common course of action with any other entity designed to limit independent bidding or competition, and
- (2) the proposer, its employees and agents have not communicated the contents of the bid to any person not an employee or agent of the proposer and will not communicate the proposal to any such person prior to the official opening of the proposal.

The undersigned proposer further certifies that this statement is executed for the purpose of inducing the City of Palmer to consider the proposal and make an award in accordance therewith.

USI Insurance Services Northwest

601 Union Street, Suite 1000, Seattle, WA 98101

Legal Name of Proposer/Firm

Business Address



09/07/2022

Signature and Title

Date

Steve McLendon

Printed Name of Title Person

Subscribed and sworn to me this 8th day of September, 2022.


Notary Public

My Commission Expires

10/1/23



APPENDIX III: THE CITY'S USI SERVICE TEAM BIOS

The City's USI Account Service Team Bios

MATTHEW LEWIS, Partner | Vice President & Lead Benefits Consultant

Matt serves as your primary point of contact, providing the City with overall strategic planning and guidance relative to your employee health and welfare benefit plans. He also helps to coordinate the deployment of analytical and compliance resources available to the City through USI.

He takes an active and leading role in working with the City to address any carrier or vendor concerns and to offer best practices and strategies regarding emerging issues, as well as to find creative solutions to the City's challenges.

Matt currently serves several public and municipality clients in Alaska including the City of Sitka, Ketchikan Gateway Borough, Galena City School District, and City of Unalaska to name a few. His clientele also includes private, union, and non-profit businesses.

Matt enjoys coupling his extensive financial understanding of the industry and trends with his insurance carrier background to produce meaningful and beneficial relationships in his role as lead consultant for his diverse group clients.



Education & Certifications

- BA, Organizational Communication, Arizona State University 1994
- Multiple State Insurance Licenses held including: WA, AK, AZ, CA, MT, ID, WY, FL, OR, TX
- Continuing education in Life and Health/Disability insurance and ethics

Community Involvement

- Beat the Bridge annual participant to help fund Juvenile Diabetes Research
- Active supporter of the Humane Society of Seattle, Phoenix and the ASPCA nationally
- Participant of the National Association of Health Underwriters
- Involved parent to two wonderful daughters. Voted funniest volleyball dad for daughter's club VB Team and proud of it!

Experience

- 4+ years with USI—Partner and Vice President of employee benefit consulting
- 27 years benefits, insurance, health and wellness experience

Expertise

- Self-Funding and ASO experience goes back to 1995 with Great-West Life (now Cigna), Aetna and United Healthcare and continues with multiple Self-Funded clients
- Stop-Loss negotiations and creative solutions to meet client budgetary goals
- Ancillary Benefit expertise with Unum and Prudential Financial
- Strategic planning and creative guidance
- Underwriting expertise and proficiency
- Aggressive and intelligent negotiator
- Wellness and total population health management

BECKY MORCOM, Vice President & Client Services Team Lead

Becky serves as the City's Client Services Team Lead and provides operational leadership to one of the four Employee Benefit service teams in USI's Seattle office.

Becky currently services two public entity clients in Sitka: the City of Sitka and the Sitka School District.

In addition to servicing a small book of business, Becky is an active client service team lead with 12 direct reports, and prides herself on being quick to respond, a thoughtful problem solver, and a clear communicator. Becky is frequently involved with new client implementations.



Education

- Oregon State University
- Continuing education in ethics training, worksite wellness initiatives and compliance, benefits components (5500 filings, FSA, HSA, HRA, HIPAA, Health Care Reform), Section 105(h) Nondiscrimination Rules, Cafeteria Plan Nondiscrimination, and benefits education

Certifications & Affiliations

- Licensed broker in the state of Washington, as well as several others

Experience

- More than 30 years with USI's Seattle office
- Seattle office Associate of the Quarter, June 1997, Service Person of the Year, 1997, Pathfinder Award 2002, PRIDE winner 2004

Expertise

- Maintaining key client relations and service to both fully-insured and self-funded clients
- Familiarity with many International Benefit Programs, assisting clients with expats and local nationals
- Identifying problems, summarizing and developing strategic solutions
- Communicating due dates, timelines and expectations
- Providing carrier product and procedure knowledge
- Developing and implement targeted client/employee topical communication plans
- Installing and renew group insurance contracts
- Administering renewals including preparation of appropriate contractual changes
- Conducting employee meetings
- Developing employee Benefit Guides and Presentations to assist employers with communicating annual renewal changes, enrollment procedures, miscellaneous benefit changes and clarifications
- Project management

ERIN McNALLY, Senior Account Manager

As the City of Palmer's dedicated Senior Account Manager, **Erin** focuses on customer service, compliance, communication, vendor management, and the ongoing administration of your account. Erin works closely with Matt Lewis and your entire USI account service team, in order to provide day-to-day support to the City.

Erin brings a wealth of knowledge to clients like the City, she currently serves 14 public and municipality clients in Alaska (6 municipalities and 8 school districts).

Erin coordinates communication programs, renewals, and policy/contractual changes as needed. Additionally, Erin is involved with strategic planning, plan implementation, employee benefits meetings, ERISA compliance issues, and claims resolution.

Erin has 7 years of experience in human resources management and 9 years in account management and employee benefits.

Prior to her role as an account manager, Erin worked as an Analyst at USI (*formerly Kibble and Prentice*), making her uniquely prepared to understand reporting complexities as well as the importance of employee facing communications and complex benefits issues.



Certifications

- Licensed Health & Life Agent in Alaska and multiple states across the nation

Experience

- 9+ years' experience in account management and benefits administration
- 7 years' experience in general multi-state human resource management, leave and payroll administration

Expertise

- Development, implementation, and management of benefit program information providing tools and resources to educate employees on plan features and changes
- Conduct employee annual benefit renewal presentations
- Support the City with compliance questions and issues including ERISA, ACA, and COBRA

In-House Specialist Resources

MANUEL MENDOZA, J.D., Vice President & In-House ERISA Counsel

Manuel serves as the in-house ERISA Counsel for USI's Northwest region, advising the employee benefits practice group.

Manuel will provide the City with counsel and guidance on compliance issues affecting health and welfare plans, including interpreting and communicating technical information on topics like PPACA, ERISA, HIPAA, FMLA and the IRC.

His previous position was with the U.S. Department of Labor Employee Benefits Security Administration, conducting investigations of employee benefit plans, sponsors and service providers.

Prior to his time with the DOL, Manuel was with a law firm in Orange County, CA in the employment law practice area, focusing primarily on wage and hour class action lawsuits and discrimination litigation.



Education

- J.D., Chapman University, Dale E. Fowler School of Law
- M.A.O.M., University of Phoenix
- B.A., University of California at Riverside
- Member, California State Bar Association
- Member, American Bar Association

Awards

- USI Summit Award, 2010

Experience

- 7 years with USI (Oregon, Washington, and California)
- 4 years with United States Department of Labor, Employee Benefits Security Administration
- Regular industry speaker on a variety of health & welfare topics, including DOL enforcement, health care reform and wellness plan compliance

Expertise

- Health and welfare compliance issues including PPACA, ERISA, HIPAA, COBRA, FMLA, as well as Code and state insurance laws
- Working with employers having associates in multiple locations

ALICIA SCALZO WILMOTH, J.D., Senior Vice President, Benefits Counsel & Northwest Regional / National Compliance Team Leader

Alicia oversees both the National and Northwest regional compliance teams and is responsible for monitoring and reporting on changes in benefits laws, publishing periodic updates and newsletters highlighting general issues with respect to welfare benefit programs.

In addition, she provides timely updates on industry trends, legislative updates, Health Care reform or compliance alerts and ideas to improve the impact and effectiveness of your programs.

Alicia also handles reviews and revisions of forms, administrative kits, and applicable literature for compliance with current regulations. She is a resource to our clients and outside professional advisors, assisting with the development and design of complex benefit plans, which include analysis of tax implications and available planning strategies.

Alicia works with the client service team to provide assistance with a wide variety of issues surrounding employer sponsored health and welfare programs.



Education

- J.D., Cum Laude, Seattle University School of Law
- B.A., Boston College
- Member, Washington State Bar Association
- Member, American Bar Association
- Member, Western Pension & Benefits Conference
- Member, National Association of Health Underwriters
- Member, Seattle's Pension Roundtable

Awards

- USI's Seattle office Associate of the Year, 2010

Experience

- 18 years with USI's Seattle office
- USI's National Practice Leader for Health & Welfare Compliance Team, composed of 19 benefits attorneys
- Regular industry speaker on a variety of health & welfare topics, including health care reform and wellness plan compliance

Expertise

- Health and welfare compliance issues including PPACA, ERISA, HIPAA, COBRA, FMLA, as well as Code and state insurance laws
- Development and design of complex benefit plans, including tax implications and planning strategies
- Working with employers having associates in multiple locations

JUSTIN RUDDIMAN, Analytical Team Co-Leader

Justin co-leads the analytical team for USI's Northwest Region, which includes offices from Oregon to Alaska, and regularly shares market, carrier and industry knowledge with benefit analysts and account service teams across the region to bring the best and most creative funding, contribution and reporting offerings to our clients.

Justin addresses the City's analytical needs by providing assistance in evaluating insurance renewals, obtaining bids and proposals from carriers.

He also performs competitive analysis with the City's current benefit programs, conduct carrier negotiations and prepare claims experience and utilization analyses.

Justin and his team provide resources and understanding around benefits, pricing and plan utilization for employers to make informed decisions on their employee benefit contracts.



Certifications & Affiliations

- Currently holds Life and Health licenses for the state of Oregon
- Completed USI 3D training

Experience

- 21+ years in the employee benefits industry
- 17+ years with USI
- 6 years as a benefit analyst, working primarily on larger self-insured clients in Oregon and Washington
- One years' experience as analytical team lead overseeing analyst team operations for USI's Northwest Region

Expertise

- High level of comfort and knowledge with all funding arrangements
- Detailed understanding of self-funded concepts and strategies for all sized groups
- Broad knowledge of self-funded market
- Population health risk management analytics
- Detailed work with clients on wellness initiatives
- Experienced trainer on self-funding topics

ETHAN SLATER, Senior Benefit Analyst & Analytical Team Co-Leader

Ethan co-leads the analytical team for USI's Northwest Region, which includes offices from Oregon to Alaska, and regularly shares market, carrier and industry knowledge with benefit analysts and account service teams across the region. Ethan and his team will bring the best and most creative funding, contribution and reporting offerings to the City.

Ethan started with USI's Seattle office as an analyst, creating a strong foundation of financial, contractual, and strategic planning for employee benefits. Ethan's MS Excel skills have led him to develop and maintain templates that are used throughout USI nationwide. Ethan and his team provide resources and understanding around benefits, pricing and plan utilization for employers to make informed decisions on their employee benefit contracts.



Education

- B.A. in Economics, University of Washington

Certifications & Affiliations

- Licenses for the states of Washington, Oregon and California
- Completed USI 3D training
- Certified Self-Funding Specialist

Experience

- 6 years with USI's Seattle office
- USI Summit Award Winner

Expertise

- Managing analytical and reporting needs
- Audit carrier renewal calculations
- Project ongoing risk and its impact on claims

BRIAN BARHANOVICH, NW Region Consulting Employee Benefits Underwriter

Brian has over 8 years of health insurance analytics and underwriting experience. His expertise includes pricing and risk management across all lines of health coverage, as well as multiple funding arrangements.

Brian's experience has given him expertise in all aspects of underwriting for healthcare, including rating, trend analysis, and strategic planning.

Brian currently consults primarily with large self-funded businesses and is responsible for coordinating financial data applications, data analysis, underwriting, risk factor analysis, and renewal negotiations.



Education

- Western Washington University

Awards

- USI Summit Award 2017

Experience

- 8+ years with USI
- 8 years of underwriting experience

Expertise

- Self-funded employee benefit plans
- Underwriting and data analysis

DAVID CULLUM, Assistant Vice President & BRC Team Lead

David leads the Benefit Resource Center (BRC). The BRC will assist your plan participants with claims-related issues as well as with eligibility problems and benefit interpretation questions for your medical, dental, short-term and long-term disability plans.

The BRC also provides you and your employees with a responsive, consistent, hands-on approach to benefit inquiries and remove the burden of associate calls to the HR Department.

Prior to joining USI, David worked for a national health insurance company, serving in several positions including case management coordination for terminally ill members. David has vast knowledge of managed care plans and specializes in customer service and claims research.



Education

- Golden State Business College

Certifications & Affiliations

- Licensed broker in Washington, Oregon, California, Alaska, Idaho, Colorado and Arizona

Awards

- USI's Seattle office Person of the Year award, 2004
- USI's Seattle office Associate of the Quarter, 2007

Experience

- 17+ years with USI
- 24 years of experience in health insurance, including case management coordination for terminally-ill members and their families

Expertise

- Knowledge of managed care plans
- Specializes in customer service and claims research

Erika brings a wealth of experience to USI's clients as the Senior Population Health Management Consultant for our Northwest Region. Prior to joining USI, Erika worked in a variety of roles across the industry spanning over a decade. She developed and implemented a complex care management program with Kaiser, supported clients as a Wellness Consultant with Cigna, and provided health coaching on lifestyle management and tobacco cessation through a health and well-being vendor. Erika's experience has given her extensive knowledge of employee engagement, program sustainability and vendor management.



In her current role, Erika helps USI's clients create a lasting culture of well-being within their organization. Erika is dedicated to supporting our clients in designing a meaningful and sustainable wellness strategy that is aligned to leadership's goals and employees' needs. She understands and is passionate about the importance of addressing well-being holistically, while also working to manage risks and avoid costs.

Erika will work closely with our Account Service Teams, our in-house national Population Health Management Team, your Benefits Consultant, and ERISA Counsel to create a long-term strategy for wellness and ensure your population health management needs are met.

Education

- Earned her Master's Degree in Public Health with a specialization in Community Health Education from Concordia Nebraska University
- Graduate of Central Washington University, majoring in Public Health and Minor in Psychology

Certifications

- Certified Holistic Nutrition Coach
- Former Personal Fitness Trainer Certification
- Certified Tobacco Treatment Specialist

Experience & Expertise

- 11 years of health and wellness experience
- 4 years of Population Health Management experience
- Weight management coaching in collaboration with Johns Hopkins
- Former business owner providing individualized health coaching services to clients
- Building and sustaining a culture of well-being to attract and retain talent, and improve morale, productivity, and presenteeism
- Utilizing data to drive strategic and meaningful wellness program development, drive outcomes, and improve population health
- Aligning wellness programs and strategies with leadership goals and employees' interests for cohesive programming
- Vendor Management

Sharon serves as Employee Benefits Communications Consultant for USI's Northwest Region with more than 25 years of professional experience in the marketing and communications discipline. In her role, she will work with the City to develop and implement communications strategies that go beyond open enrollment to help employees understand and utilize their benefits effectively.



Sharon is an award-winning multi-channel communications professional who insists on autonomy, entrepreneurship and innovation. She collaborates with your USI service team to build a communications strategy that defines and documents how to use communications to drive employees to take a specific action that align with their business goals.

She consults with your service team to analyze what the City's current channel strategy looks like and evaluate any gaps throughout the life cycle of the employee. Sharon will recommend communication best practices to achieve the best possible engagement with your benefits programs.

Utilizing USI's robust Communication HUB, Sharon has access to a full library of videos, educational materials, Brainshark presentations, USI Mobile App, email content, Benefit Guides, posters, and custom communication options to offer as part of her strategy plan.

Prior to joining USI, Sharon was the Senior Communications Specialist at Trion, a division of Marsh and McLennan where she provided HR communication strategies and tactics for client's in the Higher Education, Financial, Retail, Manufacturing, Local Government and Healthcare industries.

Education

- Associates of Science, Marketing, Art Institute of Fort Lauderdale
- Berkley Institute, Philadelphia, Graphic Design Coursework
- Bauder College, Miami, Interior Design Coursework

Certifications/Awards & Volunteer

- WELCOA Certifications
- The Dale Carnegie Course, Highest Achievement Award
- NeoGraphics Award – Strategic Multi-Channel Campaigns
- Volunteer crew, Sea Shepherd Conservation Society

Experience

- 25+ years' experience in marketing/communications
- Implementation and management of websites, benefits microsites and mobile apps
- Strategic development and implementation of multi-channel marketing campaigns

Expertise

- Employee communications including brand engagement, employee education, wellness and benefits communication strategies
- Communications best practices

Yusuf will work in concert with the City’s USI service team as the Senior Vice President of Pharmaceutical Strategies in the Employee Benefits Division.

Yusuf has extensive clinical and administrative leadership experience in medication adherence, population health initiatives, and PBM pharmacy operations and he was most recently Vice President of Pharmacy and Vendor Relationship Management for Community Health Plan of Washington with responsibility over all aspect’s medication strategy across medical and prescription benefits.



Yusuf’s responsibilities include analyzing prescription and medical drug data to design and deliver financial solutions for clients and prospective clients. Yusuf uses a holistic approach in partnership with USI Health and Welfare consultants to improve outcomes and lower total cost of care. With several years of experience in vendor contracting, Yusuf helps employers eliminate wasteful pharmacy spend by aligning PBM contracts with the best interests of USI clients and their employees. The USI goal is to create transparency in drug pricing and leverage market competition to maximize cost efficiencies for clients.

Yusuf joined USI in 2021 as an accomplished healthcare leader with a breadth of experience in the pharmaceutical industry including both commercial and government programs. Yusuf’s proven leadership experience spans managed care pharmacy, health plan benefit design, PBM contracting, clinical pharmacy and specialty pharmacy. Yusuf is well respected for his ability to streamline complex systems to create value across various healthcare services. Yusuf has overseen strategic vendor contracts including telehealth, nurse advice line, utilization management, care management, and various health technologies.

Education

- B.S., Pharmacy, University of Alberta
- B.S., Biological Sciences, University of Alberta
- MBA Candidate, Healthcare Management, Western Governors University

Role

- Provides training on Clear Options, OMNI Solutions, Rx Calculator, Modular Reporting, IPD Analytics and 3rd party calculations
- Evaluates carrier rating methodology, new product information and USI 3D
- Reviews Pharmacy solutions that USI has developed to help our clients understand pharmacy options available to them

Experience

- 21 years of industry experience
- Vice President of Pharmacy and Vendor Relationship Management, Community Health Plan of Washington
- Director of Pharmacy, Community Health Plan of Washington
- Pharmacy Manager, Various Specialty and Primary Care Centers, Group Health Plans
- Regional Pharmacy Manager, Safeway, Inc.
- Community Pharmacist, Safeway, Inc.

Jacqueline is the practice leader of the Executive Benefits department, where she specializes in Individual Disability Insurance, Long-Term Care, and Worksite Benefits.

With nearly 20 years in the insurance industry, Jacqueline supports all departments within USI, providing a variety of solutions to common industry shortfalls in coverage. She is committed to employing creative and intentional strategies to fill those gaps.

With a background in relationship management and business development, she aims to listen first for a clear understanding of her clients' needs before exploring options to meet defined goals; often leveraging strong carrier relationships, proprietary products and pricing.



Education

- B.S. in Sociology and Journalism, University of Wyoming

Certifications & Affiliations

- Licensed in all 50 states
- Long-Term Care Certified

Awards

- USI's PEAK Award Winner 2013
- USI's Seattle Office Salesperson of the year 2012
- Multiple year Heavy Hitter Award Winner
- Volunteer of the year 2005

Experience

- Nearly 20 years in the insurance industry

Expertise

- Executive Benefits
- High-Limit Income Protection
- Individual Disability Insurance
- Long-Term Care
- Worksite Benefits

Anne plays a key role with USI as the National Practice Leader in HR Technology for our Employee Benefits Division. Her exceptional market knowledge and many years of experience allow her to assist clients in cost-saving and strategizing to locate and secure the most appropriate HR solutions to meet their needs.



Anne began her insurance career in 2007 at Higginbotham Insurance Agency where she served as Director of HR Services until 2013. While there Anne managed five cross-discipline professionals and led the HR services department for one of the largest independent insurance brokerage firms in Texas.

Anne then took the prestigious role of Chief Operating Officer for Benefit Technology Resources, LLC (a leading mid-market HR technology consulting firm in the country) located out of Tampa, FL. Some of her many responsibilities included but were not limited to: the overall supervision of business operations; management oversight of benefits administration implementation and consulting divisions, with over 20 indirect reports in total.

Education

- B.A., Business Administration, Kennedy Western University, Cheyenne, Wyoming

Certifications & Affiliations

- Certified Employee Benefits Specialist (CEBS)
- Society of HR Management Certified Professional (SHRM-CP)
- Professional Human Resources Certification (PHR)
- International Foundation of Employee Benefit Plans, DFW Chapter
- Society of HR Management, FW Chapter

Experience

- 9 years of insurance industry experience
- 3+ years of experience in HR Technology

Expertise

- HR Technology
- Pairing clients with comprehensive, cost-effective HR Technology and Benefits Administration Platform solutions

Dr. Flemming engages in clinical analysis when ongoing large claims, large renewal increases or life altering events are poised to significantly impact your benefit plan. Through this analysis, our clients gain access to attending physicians who wouldn't normally discuss clinical information with an employer or broker.



Key benefits of working with a medical director:

- Credibility with carriers and medical providers is critical to be able to engage providers and carrier Medical Directors. Clarification of the details around complex cases allows us to negotiate more favorably with underwriting by taking control away from the insurance company.
- Expert advice on plan structure and utilization. It is often beneficial for members as well as the plan to look at alternative options that would not normally be covered under the benefit plan. This often leads to better cost control, as well as enhanced clinical outcomes.
- Enhancement of your plan participants' experience by being a resource for complex care and our Benefit Resource Center

Education

- M.A. Degree (Strategic Planning & National Defense)
- United States Army War College Defense Strategy Course—Graduate
- United States Air Force Air War College—Graduate
- Fellowship—Univ. of Southern California School of Medicine and Children's Hospital of Los Angeles
- Residency—Family Medicine, Pacific Hospital of Long Beach
- D.O. Degree (Osteopathic Medicine) Western Univ. of Health Science
- M.A. Degree (Human Relations & Soc. Psy) —Pacific Lutheran Univ.
- B.S. in Zoology —Univ. of Washington

Certifications & Affiliations

- Board Certified in Family Medicine
- Sub-specialties in adolescent medicine, HIV/AIDS related diseases

Experience

- 20+ years with health insurance and the health plan industry
- Chief Medical Officer for commercial and government health insurance and TPA services
- Worked with government, non-profit, and public entities at local, state, and regional levels
- Associate Clinical Professor—Western Univ. of Health Science
- Physician Executive Leadership Program—Harvard Univ.

Expertise

- Dr. Flemming's clinical analysis resulted in a reduction of over \$400,000 in additional liability to a USI client. His engagement around the renewal process helped the client maintain competitive benefits and limit future liabilities

22-02HR

REQUEST FOR PROPOSAL

HEALTHCARE INSURANCE BROKERAGE SERVICES

INFORMATION & INSTRUCTIONS

The City of Palmer, Alaska is seeking proposals for an experienced and qualified Insurance Broker of Record for Health Insurance and ancillary benefits as outlined in this RFP. Such services would include, but not be limited to the review, analysis, recommendation, and placement of all employee benefit policies and plans in the areas of health, dental, vision, life, STD/LTD and supplemental insurance policies.

The population of the City of Palmer is approximately 6,100 with 64 full time municipal employees and 33 part-time, seasonal, and on-call employees. In addition to providing traditional government services, the city also operates an extensive Water/Wastewater Utility System and Municipal Airport. Full-time employees who are not temporary or season in nature and are schedule to work more than thirty (30) hours per week are eligible to participate in the health insurance as well as their qualified dependents, currently 62 fulltime employees participate in the insurance. Plan coverage is available for employee, employee and spouse or domestic partner, employee, and child(ren) and employee and family. Our current health care plan includes medical, dental, vision, AD&D, and life insurance as a part of the package. A benefits booklet outlining the city's current insurance coverage and limitations may be found at <https://www.palmerak.org/hr/page/benefits>.

SECTION I

SUBMISSION REQUIREMENTS

1.0 The complete original proposal must be submitted in a sealed package and received in accordance with the instructions detailed in this RFP. All proposals shall be marked RFP No. 22-02HR – Employee Health and Supplemental Insurance Broker Services. Proposers shall file all documents necessary to support their proposal and include them with their proposal. Proposers shall be responsible for the actual delivery of proposals during business hours to the address indicated in this RFP; electronic submissions will not be accepted. It shall not be sufficient to show that the proposal was mailed in time to be received before scheduled closing time.

1.1 Proposal Format: Proposals shall be submitted in the following format and include the following information:

- a) Detailed description of services as described within each Scope of Services as requested
- b) Fee Proposals per instructions in Section III signed by responsible party
- c) Contact names of references with phone numbers
- d) Any additional information pertinent to the proposal

1.2 It is the sole responsibility of the PROPOSER to assure that they have received the entire Request for Proposal (RFP).

1.3 Proposers will be notified via the City of Palmer's website (<https://www.palmerak.org/hr/page/request-proposal-insurance-brokerage-services>) of any change in the specifications contained in this RFP.

1.4 No verbal or written information which is obtained other than through this RFP or its addenda shall be binding on the City of Palmer. No employee of the City of Palmer is authorized to interpret any portion of this RFP or give information as to the requirements of the RFP in addition to that contained in or amended to this written RFP document.

1.5 Right of Rejection and Clarification: The City of Palmer reserves the right to reject any and all proposals and to request clarification of information from any proposer. The City of Palmer is not obligated to enter into a contract based on any proposal submitted in response to this document.

1.6 Request for Additional Information: Prior to the final selection, proposers may be required to submit additional information which the City may deem necessary to further evaluate the proposer's qualifications.

1.7 Denial of Reimbursement: The City of Palmer will not reimburse proposers for any costs associated with the preparation and submittal of any proposal, or for any travel and/or per diem costs that are incurred.

1.8 Gratuity Prohibition: Proposers shall not offer any gratuities, favors, or anything of monetary value to any official, employee, or agent of the City of Palmer for the purpose of influencing consideration of this proposal.

1.9 Right of Withdrawal: A proposal may be withdrawn and resubmitted if done prior to the deadline as listed in the RFP. Such request for withdrawal shall be in writing.

1.10 Right of Negotiation: The City of Palmer reserves the right to negotiate with the selected proposer the exact terms and conditions of the contract.

1.11 Right of Rejection of Lowest Fee Proposal: The City of Palmer is under no obligation to award this project to the Proposer offering the lowest fee proposal. Evaluation criteria included in this document shall be used in evaluating proposals. Award shall be made to the person determined by the City to be the best qualified and shall be for an amount of compensation determined to be fair and reasonable. If compensation cannot be agreed upon with the best-qualified person or firm, negotiations shall be formally terminated with that person. If more than one firm is determined to have submitted a qualified proposal, negotiations may be conducted with the next firm, in order of their respective qualification ranking. The contract may be awarded to the person or firm then ranked as best qualified if the amount of compensation is determined to be fair and reasonable.

1.12 Business License: Palmer Municipal Code, Chapter 5.04 requires that all businesses conducting business within the boundaries of the City have a current business license issued by the City. Prior to any award because of this solicitation, the Contractor may be required to provide proof that they have a current City of Palmer Business License or proof that they have applied for one. Copies of this city code and instructions on obtaining a business license may be obtained at the Finance Department, or by calling 907-745- 3271.

1.13 Exceptions to the RFP: Proposers may find instances where they must take exception with certain requirements or specifications of the RFP. All exceptions shall be clearly identified, and written explanations shall include the scope of the exceptions, the ramifications of the exceptions for the City of

Palmer, and a description of the advantage to be gained or disadvantages to be incurred by the city because of these exceptions.

1.14 Indemnification: Proposer, at its own expense and without exception, shall indemnify, defend, and pay all damages, costs, expenses, including attorney fees, and otherwise hold harmless the City of Palmer, its employees, and agents, from any liability of any nature or kind regarding the delivery of these services.

1.15 Rights to Submitted Material: All proposals, responses, inquiries, or correspondence relating to or in reference to this RFP, and all reports, charts, and other documentation submitted by proposers shall become the property of the City of Palmer when received.

1.16 Basis of Award: Proposals will be evaluated by a minimum of three (3) City of Palmer management level employees according to the following criteria and weight at a minimum:

- a) Understanding of scope and ability to provide services as requested overall clarity and responsiveness of the proposal to this RFP - 20pts
- b) Brokerage Fees – 25pts
- b) Experience and qualifications of the firm and account executive assigned to the city's account - 20pts
- c) Description of how you will handle the account/access to markets for proposed insurance– 15pts
- d) Ability to obtain an affordable benefit package that meets the needs of the city - 20pts

The city administration intends to make a recommendation for contract award to the City Council on October 11, 2022, if there is a proposal that is suitable to the needs of the city. The City Council will provide the final approval based upon what is in the best interest of the City of Palmer.

1.17 Copies: One original and three (3) copies of the proposal and supporting documents must be submitted in response to the RFP. **The fee proposal and Appendix B shall be submitted in a separate sealed envelope with each copy of the proposal** (original plus three (3) copies). All responses must relate to the specifications as outlined.

1.18 Contacts: Questions regarding this request for proposal should be directed in to:

Kimberly Green, Human Resource Manager

(907) 761-1302

Email: kgreen@palmerak.org

Answers to questions submitted regarding this RFP will be shared with all proposers via the city's website <https://www.palmerak.org/bids>

1.19 Submittal of Qualifications: Proposers shall submit experience and qualifications as described below. Additional information may be submitted as appropriate to further describe broker capabilities:

- a) List of clients and contact names
- b) Licensed as an insurance broker or agent in the State of Alaska, with at least 5 years of experience in providing services as outlined in this RFP
- c) Insurance coverage as outlined in the professional service agreement

d) Ability to act as broker in procuring insurance from the city's current insurance providers

1.20 Contract: The city reserves the right to negotiate final contract terms with any proposer selected. The contract between the parties will consist of the RFP, including the professional services agreement form, together with any modifications thereto, and the awarded proposer's proposal, together with any modifications and clarifications thereto that are submitted at the request of the city during the evaluation and negotiation process. In the event of a conflict in language between the documents referenced above, the provisions and requirements set forth and/or referenced in the RFP shall govern. However, the City of Palmer reserves the right to clarify any contractual relationship in writing with the concurrence of the contractor, and such written clarification shall govern in case of conflict with the applicable requirements stated in the RFP or the contractor's proposal. In all other matters not affected by the written clarifications, if any, the RFP shall govern.

1.21 Assurances: By responding to this RFP, each proposer assures the city that, if selected as the city's broker, he or she will:

- a) Make a diligent effort to place all insurance requested by the city at the lowest possible price consistent with adequate breadth of coverage and stability of insurers.
- b) Advise the city of ways in which coverages proposed or provided differ from that currently in place.
- c) Broker agrees to disclose to the city all commissions he or she is eligible to receive or has received from insurers providing coverage to the city under this contract. Whenever the broker must receive commission from an insurer such commissions must be returned to the city or reduce the fixed fee in an equal amount. If the cost of the policy is the same with or without a commission, the broker will take the commission and return it to the city or reduce the fixed fee in an equal amount.
- d) Not assign or transfer the city's account, or any portion of the city's business, without the city's prior written approval.
- e) Fully disclose to the city all quotes received from insurers, always acting in the city's best interest.
- f) Comply with all provisions of this RFP and their proposal throughout the term of appointment.

1.22 Execution of Agreement: The proposer whose proposal is accepted shall execute the Agreement and furnish the required insurance within ten (10) working days after council approval of the award. The Agreement shall be considered executed by the successful proposer when an authorized representative of the proposer signs the Agreement, and the insurance certificate(s) are received by the Human Resource Manager. Failure or neglect of the proposer to execute the Agreement within the time specified may result in the award of the Agreement to the next lowest proposer.

The city will execute the Agreement within ten (10) working days after execution by the proposer as set forth above. The date the Agreement is executed by the city is the Agreement Date. The rights of the obligations provided for in the Agreement shall become effective and binding upon the parties on the Agreement Date.

1.23 Proposer's response to this RFP shall constitute an agreement to all terms and conditions specified in the RFP, including, without limitation, the *Professional Services Agreement* form and all terms and conditions therein.

1.24 Proposer understands and acknowledges that the representations above are material and important and will be relied on by the city in evaluation of the proposal. Any proposer misrepresentation may be treated as fraudulent concealment from the city of the true facts relating to the proposal.

1.25 All interested and qualified proposers who meet the requirements of the RFP will be considered.

1.26 The city is an equal opportunity employer and complies with Title I of the American with Disabilities Act. Proposers who need accommodation to respond to this RFP may call the Human Resources at 907-761-1302.

1.27 Protests: Protests will be handled in accordance with Palmer Municipal Code 3.21.290

1.29 Schedule: The dates listed below are estimates and subject to change without notice.

Request for Proposal Issued	August 19, 2022
Proposals Due	2:00 pm September 16, 2022
Council Decision	October 11, 2022

Proposals will be opened at 2:15 PM on Thursday, September 16, 2022, in City Hall.

SECTION II SCOPE OF WORK

2.0 The scope of work provided by the broker shall include the following, but is not limited to:

- In advance of expiration date and/or anniversary date of each policy, Broker of Record shall research and evaluate all markets, including present insurer(s), and apprise the city, well in advance of expiration and/or anniversary, or coverage availability, choices, costs, recommendations, change in terms and conditions, status of insurer(s), etc.
- Submit written comparison of benefits and pricing between current program and prospective plans to the Human Resource Manager and make recommendations.
- Inform the Human Resource Manager of changes in insurance market conditions, status of insurers, legislative activity, and laws as these may affect the City of Palmer.
- Seek information from the insurance industry and other sources regarding the availability of products, coverage, rating information, licensing data, etc., which may assist and/or affect the city.
- When marketing coverage, research markets and submit specifications to licensed prospective insurers at least 90 days before expiration of current coverages ends.

- Oversee implementation of insurance carrier changes, if any, including but not limited to: re-enrollment (if necessary), employer application submission, summary of coverage preparation (if necessary), employee application submission, summary of educational meetings required, assist in proofing any master policies and employee certificates, assist in procuring ID cards (if applicable) and credit for deductible payments already made by the employee(s). Overall, seeing to it that the new insurance carrier meets established deadlines worked out in advance for all stages and steps of transition.
- Assist the city with any claim billings, administrative, regulatory compliance requirements or other problems that may occur during coverage periods.
- Provide estimated expenditures for employee benefit programs to the city in time for fiscal year budget submissions as required (annually before November 1st)
- Review year-end settlements from insurance carriers, if any.
- Provide, after fiscal year ends, a commission settlement and make final reparation to city if commissions exceed agreed upon fee within 30 days of calculation.
- Periodic review of city employee insurance and benefit coverage and loss data for purposes of making recommendations to the city with respect to the need for ancillary insurance services, additional insurance coverage and modifications, updating or upgrading of existing coverage(s).

OTHER CONDITIONS

- Apprise the Human Resource Manager of changes in the status of all licensing, including whether representation of an insurer of city coverage has terminated or whether any disciplinary action is pending before a regulatory agency.
- Advise on any substantive complaints received from persons covered under the city's insurance programs.
- Broker of Record shall perform all duties and responsibilities usual to those of an insurance agent, broker, certified insurance consultant, including duties and responsibilities usual to all other licenses required in the transaction of business on behalf of the City of Palmer.

2.1 Contract Period: Proposals should assume the initial contract term of one year with an effective date of February 1, 2023. The contract may be renewed up to three additional years at the sole discretion of the city.

2.2 Submittal of Qualifications: Proposal format should follow these basic guidelines for each category of service submitted as a response to this RFP. For each item in this section, please provide a statement regarding the firm's ability to meet the criteria.

2.2.1 Describe in detail the qualifications of the firm and the company personnel to whom the task would be assigned as well as any back up personnel. Details should include:

- a) Familiarity and years of service to municipal and local government clients
- b) Detail of past work performance including size of entity
- c) Names of assigned personnel and their function with relation to this proposal
- d) Experience, education, and training of assigned personnel with particular regard to public entity experience

2.2.2 References with names, addresses, and phone numbers of current clients who can be contacted by the city for discussion of services provided to that client.

2.2.3 Any additional remarks/comments the company wishes to make to elaborate their proposal and qualifications.

2.3 Scope: Services in advising and coordinating with the city should include, but are not limited to the following:

2.3.1 Annual claim review meetings with appropriate city Staff.

2.3.2 Facilitate insurance company interface and coordination in the following areas:

- a) Renewal information format and market presentation
- b) Marketing of existing coverages
- c) Bid insurance contracts to assure best possible conditions and pricing

2.3.3 Develop coverage options as agreed upon for coverages not currently in effect for the city's review. Such review should indicate a market review of coverages for both price and conditions as well as alternatives for managing the identified risk other than a traditional insurance product where such alternatives exist.

2.3.4 Provide options for the city's health insurance plans to include, but not limited to: Health Savings Arrangement (HSA) and/or Health Reimbursement Arrangement (HRA) and/or Section 125 plan.

- a) Proposal should include a third-party administrator to manage the Section 125 if included in the proposal as well as costs associated with such a plan.

2.3.5. The responder to this RFP must submit a proposal that includes COBRA administration to include COBRA eligibility notifications and tracking and acceptance of COBRA payments and monitoring of payments.

2.3.6 Assist the city in reviewing all insurance policies and plans as needed.

2.3.7 Provide service for day-to-day contact on insurance matters.

2.3.8 Other services as are normally and customarily required of a municipal insurance broker.

2.4 Compensation: Each proposal must include the Fee Proposal enclosed as Section III in addition to the completion of Appendix B. Compensation will be in the form of a fixed fee. The broker agrees to return all commissions received to the City of Palmer or make other arrangements with the carriers to reduce the premium by the amount of the commission. The city will pay the fee prior to April 30 of each contract year.

2.5 The broker will on an annual basis provide documentation of the companies solicited and their bids.

**SECTION III
FEE PROPOSAL**

I have read and understood the requirements set forth in this RFP and agree to comply except as noted. The fee proposal includes all fees for work as described in Section II, Scope of Work. Additional pages may be used to show detail of unit costs and options.

INSURANCE BROKER SERVICES:

First Year Fixed fee for Broker Services: \$ _____

If we, the Insurance Broker terminate this agreement for convenience prior to the expiration of the Term, we will be deemed to have fully earned and be entitled to a pro rata portion of the Fee, calculated from the start of the Fee period through the date of termination. If the City of Palmer terminates this agreement for convenience prior to the expiration of the Term, the Insurance Broker will be deemed to have fully earned and be entitled to a portion of the fee as set forth in the following schedule:

During the first six months: 75%

After six months: 100%

Proposer's Signature

Date

FEE PROPOSAL AND APPENDIX B ARE TO BE SUBMITTED IN A SEPARATE SEALED ENVELOP

**SECTION IV
SUBMITTAL PAGE**

By signing below, the Proposer hereby certifies to the following:

1. The individual signing below, or the firm associated or corporation of which they are a member, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of a free competitive process in connection with this solicitation.
2. The individual signed below is authorized by the firm association or corporation to bind such association or corporation to a legal contract.
3. The individual signing below, or the firm association or corporation of which they are a member, is not debarred or suspended from doing business with the City of Palmer.
4. They are acknowledging receipt of the following Addenda Numbers (if no addenda have been issued, either leave blank or write "N/A" or "None")

(List Addenda numbers that you are acknowledging receipt of)

<hr/> <p>Company Name</p>	<hr/> <p>Date</p>
<hr/> <p>Mailing Address</p>	<hr/> <p>City, State, Zip Code</p>
<hr/> <p>Printed (or typed) Name</p>	<hr/> <p>Signature</p>
<hr/> <p>Contact Person (printed or typed)</p>	<hr/> <p>Title</p>
<hr/> <p>Phone Number</p>	<hr/> <p>Fax Number</p>
<hr/> <p>Email Address</p>	

It shall be the responsibility of the Proposer to ensure their proposal is received at or before the date and time fixed for closing. Proposers should include the following with their proposal:

- ✓ Signed Submittal Page (acknowledging Addenda if applicable)
- ✓ One (1) original and three (3) copies of your signed proposal
- ✓ Copy of Professional License
- ✓ Instructions to Proposers & Specifications/Scope of Services

**SECTION V
NON-DISCRIMINATION STATEMENT**

The proposer certifies that:

- (1) No person shall be excluded from participation in, denied the benefit of, or otherwise discriminated against on the basis of race, color, national origin, or gender in connection with any bid submitted to the City of Palmer or the performance of any contract resulting there from;
- (2) That it is and shall be the policy of this Company to provide equal opportunity to all businesspersons seeking to contract or otherwise interested in contracting with this Company, including those companies owned and controlled by racial minorities, cultural minorities, and women;
- (3) In connection herewith, we acknowledge and warrant that this Company has been made aware of, understands and agrees to take affirmative action to provide such companies with the maximum practicable opportunities to do business with this Company;
- (4) That this promise of non-discrimination as made and set forth herein shall be continuing in nature and shall remain in full force and effect without interruption;
- (5) That the promises of non-discrimination as made and set forth herein shall be and are hereby deemed to be made as part of and incorporated by reference into any contract or portion thereof which this Company may hereafter obtain and;
- (6) That the failure of this Company to satisfactorily discharge any of the promises of nondiscrimination as made and set forth herein shall constitute a material breach of contract entitling the City of Palmer to declare the contract in default and to exercise any and all applicable rights and remedies including but not limited to cancellation of the contract, termination of the contract, suspension and debarment from future contracting opportunities, and withholding and or forfeiture of compensation due and owing on a contract.

Signature

Date

**APPENDIX A
CITY of PALMER
REQUEST FOR PROPOSAL
EMPLOYEE INSURANCE AND BENEFIT BROKER OF RECORD
A Completed Form must be submitted with the proposal**

Question	Yes	No
Is your firm licensed in the State of Alaska?		
Has your firm ever been suspended, warned, or fined?		
Is your firm currently in arrears on payments of insurance premiums to any insurance company?		
Does your firm have two or more qualified persons to handle the City of Palmer's account with a minimum of ten (10) years of experience in employee benefits that have a CLU or CEBS designation?		
Do you carry Insurance Agents Errors & Omissions coverage with a limit of at least \$5 million?		
Do you now write, or have you written within the last four (4) years at least one account in the State of Alaska with premiums over \$4 million or more? Please describe type of account and coverage involved:		
Do you now or have you ever written insurance coverage for a political subdivision in the State of Alaska? (Municipality, school system, public authority, etc.) Please describe type of account and coverage written:		
If appointed Broker of Record, will you prepare an annual stewardship report detailing your activities on behalf of the City, the City's premium and loss results and include your observations and recommendations for changes in the market, coverage and other factors affecting the City's health insurance program?		
Do you have an affirmative action plan in place?		
List below those companies you would approach for the medical, life and long-term disability insurance and your annual premium volume with each company.		

Do you understand that this appointment, if made, will be for a period of one (1) year with a possibility of three (3) renewals, subject to satisfactory performance as determined by the City?		
Do you agree to disclose, in writing, all compensation received by you or your firm in connection with the placement or servicing of insurance for the City of Palmer from any source other than the City?		
In the event you receive access to “protected health information” (PHI) concerning the City of Palmer members while performing Broker of Record duties, do you agree not to use or disclose this PHI for any purpose other than to perform your obligations as Broker of Record or as required by law?		
Please expand on any reply by attachment hereto and include any other information you feel will be pertinent for consideration on your appointment as Broker of Record.		

APPENDIX B

COMPENSATION SCHEDULE

Failure to provide a completed form with your proposal may result in rejection of your proposal.

Each firm shall provide an explanation of compensation plans for your firm under this proposal including all the services that are to be included in that fee for the potential four (4) years of the engagement. The City shall consider appointments on a **fee basis** for all policies other than the City’s health care provider. All group policies shall be issued ex-commission. Please enter below, the annual broker fee per each fiscal year listed.

TERM	Fee
Fiscal Year 2023-2024	
Fiscal Year 2024-2025	
Fiscal Year 2025-2026	
Fiscal Year 2026-2027	

Do you agree that your fee schedule shown above applies to all coverage provided by your firm, including any subsidiary, affiliated or allied firms?

_____ Yes _____ No

APPENDIX C
CITY of PALMER
NON-COLLUSIVE AFFIDAVIT OF PROPOSER

The undersigned proposer, having fully informed themselves regarding the accuracy of the statements made herein certifies that.

- (1) the proposer developed the bid independently and submitted it without collusion with, and without any agreement, understanding, or planned common course of action with any other entity designed to limit independent bidding or competition, and
- (2) the proposer, its employees and agents have not communicated the contents of the bid to any person not an employee or agent of the proposer and will not communicate the proposal to any such person prior to the official opening of the proposal.

The undersigned proposer further certifies that this statement is executed for the purpose of inducing the City of Palmer to consider the proposal and make an award in accordance therewith.

Legal Name of Proposer/Firm

Business Address

Signature and Title

Date

Printed Name of Title Person

Subscribed and sworn to me this ____ day of _____, 20 ____.

Notary Public
My Commission Expires

**City of Palmer
Action Memorandum No. 22-062**

Subject: Authorizing the City Manager to Execute a Contract with White Knight Services in the Amount of not to exceed \$ 2,004.00 per complete call out for snow removal City facilities.

Agenda of: October 25, 2022

Council Action: **Approved** **Amended:** _____
 Defeated

Originator Information:

Originator: Jude Bilafer, Director of Public Works

Department Review:

Route to:	Department Director:	Signature:	Date:
_____	Community Development	_____	_____
_____	Finance	_____	_____
_____	Fire	_____	_____
_____	Police	_____	_____
X	Public Works	<i>JPB</i>	10/4/2022

Certification of Funds:

Total amount of funds listed in this legislation: \$ Unknown event based

- This legislation (√):
- Creates revenue in the amount of: \$ _____
 - Creates expenditure in the amount of: \$ _____
 - Creates a saving in the amount of: \$ _____
 - Has no fiscal impact

Funds are (√):

- Budgeted Line item(s): Roads 01-17-40-6030
- Not budgeted _____

Director of Finance Signature: *[Signature]*

Approved for Presentation By:

	Signature:	Remarks:
City Manager	_____	_____
City Attorney	_____	_____
City Clerk	_____	_____

Attachment(s):

Bid tabs:

White Knight Services \$ 2,004.00 per complete call out.

Walker Lawn & Landscaping LLC \$ 2,035.00 per complete call out.

Summary Statement/Background:

Staff is requesting approval for Snow Removal Service for the City of Palmer’s Facilities. This is an annual contract the City of Palmer awards with option to renewal for two consecutive years. The Contractor will be used in an “On-call” basis for winter snow removal at 8 locations throughout the City of Palmer. Palmer Public Safety building 1 and 2, Palmer Fire Department Station 31, Palmer City Hall, Palmer Fire Training Facility & Community Development, Palmer Library, Palmer Tourist Center, and Palmer Event Center.

An invitation to bid was posted for two weeks. The City of Palmer received two bids which were reviewed by City Staff. White Knight Services had the lowest bid price at \$ 2,004.00 per hour per complete call out. White Knight Services has had the facilities snow removal contract for the past 3 years.

Public Works Maintenance Superintendent will be responsible for call outs and overseeing contractor’s snow removal services at these 8 City facilities.

Administration’s Recommendation:

To Approve Action Memorandum No. 22-062.

BID TABULATIONS

	Bidder 1	Bidder 2	Bidder 3	Bidder 4
	Walker Lawn & Landscaping	White Knight Services		
BID PROPOSAL	Bid Amount	Bid Amount	Bid Amount	Bid Amount
Signed Proposal (Y/N)	Y			
Total Per Event Bid	\$2,035.00	\$2,004.00		
	Bidder 5	Bidder 6	Bidder 7	Bidder 8
	Bid Amount	Bid Amount	Bid Amount	Bid Amount
BID PROPOSAL				
Signed Proposal (Y/N)				
Total Bid				