#### **MINUTES**

Montevallo City Council Work Session September 11, 2023 5:30 p.m. at City Hall

Present: Mayor Rusty Nix, Council Member Lelia Mitchell, Council Member Kenneth Dukes, Council Member Sonya Swords, Council Member Martha Eisenberg, Council Member David King absent, Quorum present.

Work Session called to order at 5:30 p.m. by Mayor Nix.

Mayor Nix called for Discussion of Business Items on Agenda: New Business:

- **Discussion** of Historic Plaques for African American Heritage Trail acceptance of recommendation from Historic Preservation Commission.
- Discussion of Mahler House Renovation Plans. Proposal of services from Rob Walker Architect.
- **Discussion** of Resolution 09252023-440, a Resolution of the City of Montevallo adopting the 2023 2024 Fiscal Budgets (First Review) Appendix 1
- **Discussion** of Board Appointments: Andrea Eckelman and Christopher Smith to Parks and Recreation Board.

*Montevallo City Council Meeting* September 11, 2023 6:00 p.m. at City Hall

Present: Mayor Rusty Nix, Council Member Lelia Mitchell, Council Member Kenneth Dukes, Council Member Sonya Swords, Council Member Martha Eisenberg, Council Member David King, absent. Quorum present.

**Pledge of Allegiance** 

Council Meeting called to order at 6 p.m. by Mayor Rusty Nix.

**Approval and or corrections of the Minutes** 8.28.23 – Motion by Council Member Mitchell, seconded by Council Member Eisenberg, All Ayes, Motion passed.

Recognitions / Awards: Moment of Silence in Honor of the lives lost on September 11, 2001

**Opportunities for Citizens to speak to the Council: None** 

Mayor Nix called for Committee Reports:

Public Health & Safety: Mayor Nix called on Chief Littleton for the Police Department report. Chief Littleton reported there were 98 total Cases in August and 740 Total Cases year to date. See Appendix 2.

Mayor Nix called on Chief Davis for the Fire and EMS Department Report. Chief Davis Reported a total of 171 Total Calls for the month of August 2023. Year to Date Calls I,078. See Appendix 3

**Sustainability:** (Streets & Sanitation, Recycling, Arbor & Beautification, ValloCycle, Environmental Preservation Initiatives, and Historical Commission)

Mayor Nix called on Council Member Dukes for the Sustainability Report. Council Member Dukes called on Kirk Hamby, Head of Public Works. Kirk reported the Tinglewood Festival was a big success and Public Works was on site throughout the day assisting with trash pickup as well as set-up and take down of event equipment. Free County Dump Day will be Saturday, October 7<sup>th</sup> and the Recycling Center will close at 2 p.m. that day. Wadsworth Street Parking area is almost complete. Work remaining includes striping of spaces and installation of parking stops.

**Recreation, Preservation and Community Development** (Parks & Recreation, Youth Athletics, Trails, Annexations) Mayor Nix called on Council Member Eisenberg for the Recreation, Preservation and Community Development Reports. Council Member Eisenberg called on Shane Baugh, Head of Parks and Recreation. Shane reported Youth Football opening games were held this week. Work has started at Stephens Park on the Pavilion and Pickleball Courts.

**Education, Arts & Outreach** (Schools, Library, UM, Boys & Girls Club, American Village, Sister City Commission, Artwalk, IMPACT) Mayor Nix called on Council Member Mitchell for the Education, Arts and Outreach Committee Reports. Council Member Mitchell called on Marissa Wilson, Director of the Parnell Memorial Library for the library report. See Appendix 4. Council Member Mitchell called on Sarah Hogan, Program Director of Impact Montevallo. Sarah reported September is National Suicide prevention Month. October 17<sup>th</sup> will be National Night Out and October 24<sup>th</sup> is the 3<sup>rd</sup> annual Chief's Challenge. See Appendix 5

Council Member Mitchell called on Katie Simmons Junior Mayor of the Montevallo Junior City Council (MJCC). Katie reported MJCC fund raising at the Tinglewood Festival was successful with a total of \$351 from Snow Cone sales.

Council Mitchell provided a report on the Boys & Girls Club of Montevallo Activities including funds donated in honor of Johnny Holsemback. See Appendix 6.

**Finance, Economic Development & Tourism** (Finance, MDCD, IDB, Chamber, Main Street) Mayor Nix called on Council Member Swords for the Finance, Economic Development & Tourism Reports. Council Member Swords called on Adele Nelson, Executive Director Montevallo Chamber of Commerce. Adele reported Tinglewood Festival was held Saturday, September 9 with 39 sponsors, 52 artists, 200 volunteers and attendance figure around 8,000. The Chamber will host a Ribbon Cutting Ceremony for the EV Charging Station at 550 Main St. on Thursday, September 14<sup>th</sup> at 10 a.m. and everyone is invited to attend. See Appendix 7.

Council Member Swords reported on the MDCD Meeting, with discussion of Wadsworth Street Parking, Hwy 25 Sidewalks and the Community Center.

#### **Consent to Pay the Bills**

Mayor Nix asked for a Motion to Pay the Bills. Council Member Dukes made a motion to pay the bills, seconded by Council Member Mitchell, All Ayes. Motion passed.

#### **New Business:**

- Acceptance of Historic Commission Plaques for African American Heritage Trail Historic Markers at Ward Chapel A.M.E. and Shiloh Missionary Baptist Church – Motion made by Council Member Dukes, seconded by Council Member Eisenberg, All Ayes, Motion passed. See Appendix 8.
- Consideration of proposal from Rob Walker Architect for Mahler House Renovation. Contract Bidding, Mechanical, Electrical Plans, Construction Oversight - Motion made by Council Member Dukes, seconded by Council Member Swords, Al Ayes Motion Passed. See Appendix 9.

#### Old Business: None

**Board Appointments:** Andrea Eckleman and Christoper Smith to Park and recreation Board Term to Expire 09.11.26. Reappointment of Kevin Hughes to Design Review Committee Term to Expire 09.11.26. Motion to accept as a slate by Council Member Dukes, second by Council Member Swords. Ayes Mithcell, Dukes, Swords Nix, Nay Eisenberg Motion passed. See Appendix 10 and 11.

#### Other Business: None

#### Citizen Participation: None

There being no further business before the Council, **Mayor Nix called for a Motion to Adjourn**. Motion to adjourn made by Council Member Dukes, seconded by Council Member Mitchell, All Ayes. Meeting Adjourned at 7:00 p.m.

Submitted by:

Steve Gilbert City Clerk / Treasurer

#### RESOLUTION NO. 09252023-440 A RESOLUTION OF THE CITY OF MONTEVALLO, ALABAMA ADOPTING ITS 2023-2024 FISCAL BUDGETS

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Whereas, Generally Accepted Accounting Principles (GAAP) recommend municipalities approve an annual financial budget:

#### NOW THEREFORE BE IT RESOLVED BY THE CITY COUNCIL OF MONTEVALLO, ALABAMA, AS FOLLOWS 1. The Council hereby adopts the following:

2023-2024 GENERAL FUND BUDGET \$ 8,276,981.73 REVENUES EXPENDITURES 2.000.00 BEAUTIFICATION Ś HISTORICAL COMMISSION 11.500.00 \$ \$ 24,084.00 **CITY JUDGE** \$ CITY PROSECTOR 14,677.50 MAYOR'S OFFICE \$ 29,380.00 CLERKS OFFICE \$ 87,950.00 \$ **CITY COUNCIL** 25,700.00 \$ **REVENUE OFFICER** 2,500.00 ECONOMIC DEVELOPMENT \$ 85,711.00 \$ 989,925.88 CITY HALL \$ **CITY SHOP** 17,800.00 \$ POLICE 2,033,118.00 IMPACT \$ 137,550.24 FIRE & RESCUE \$ \$99,500.00 \$ 69,950.00 CEMETERY BUILDING INSPECTOR 0.00 FIRE INSPECTOR \$ 22,800.00 **STREETS & ROADS** \$ 858,900.00 LEAF & LIMB \$ 83,270.00 \$ SANITATION 719,400.00 \$ ANIMAL CONTROL 5,100.00 AGING PROGRAM \$ 31,600.00 **PARKS & RECREATION** \$ 406,900.00 VALLO CYCLE Ś 600.00 **COMMUNITY BAND** \$ 250.00 **RECYCLING CENTER** \$ 49,525.00 MAHLER PROPERTY \$ 150,000.00 \$ 38,825.88 LOAN REPAYMENT (Storm Shelters / Projects) **ARPA GRANT EXPENDITURES** \$ 491,656.73 TOTAL EXPENDITURES \$ 6,990,174.23 NET INCOME BEFORE OTHER FINANCING SOURCES Ś 1,286,807.50 OTHER FINANCING SOURCES (USES)- TRANSFERS (1,240,230.00) \$ **NET REVENUES LESS EXPENDITURES** \$ 46,577.50

4/5 CENT GAS EXCISE TAX FUND		
REVENUES	\$	12,200.00
EXPENDITURES	<u> </u>	0.00
NET REVENUES LESS EXPENDITURES	\$	12,200.00
2 & 7 CENT GAS EXCISE TAX FUN		
REVENUES	\$	13,820.00
EXPENDITURES	\$	13,820.00
NET REVENUES LESS EXPENDITURES		0.00
10 CENT GAS TAX FUND (GAS)		
REVENUES	\$	46,701.00
EXPENDITURES		46,701.00
NET REVENUES LESS EXPENDITURES		0.00
10 CENT GAS TAX FUND (DIESEL)		
REVENUES	\$	16,600.00
EXPENDITURES		16,600.00
NET REVENUES LESS EXPENDITURES	<del></del>	0.00
COURT - FUND 24		
REVENUES	\$	357,590.00
EXPENDITURES	\$	297,590.00
TRANSFERS OUT	\$	60,000.00
NET REVENUES LESS EXPENDITURES		0.00

FORFEITURE - FUND 25		
REVENUES		0.00
EXPENDITURES	·	0.00
NET REVENUES LESS EXPENDITURES		0.00
STATE CAPITAL IMPROVEMENT - FUND 26		
REVENUE	\$	66,500.00
EXPENDITURES	\$	30,000.00
NET REVENUES LESS EXPENDITURES	\$	36,500.00
LIBRARY FUND - FUND 27		
REVENUES	\$	23,800.00
TRANSFER IN FROM GF	\$	304,800.00
EXPENDITURES	\$	328,600.00
NET REVENUES LESS EXPENDITURES		0.00
MONTEVALLO REGIONS CAPITAL RESERVE FUND - FUR	ID 30	
OPERATING TRANSFERS IN		
TRANSFER IN FROM GF 10%	\$	80,000.00
TRANSFER IN - Library Debt Payments	\$	70,776.00
TRANSFER IN - Fire Truck Lease Payments	\$	54,654.00
TOTAL - TRANSFERS IN	\$	205,430.00
CAPITAL EXPENDITURES		
CITY HALL	\$	5,000.00
POLICE - VEHICLES		60,000.00
MISC.	\$ \$ \$	25,000.00
STREET / SANITATION VEHICLES	\$	30,000.00
STREET MOWER	\$	13,000.00
TOTAL CAPITAL EXPENDITURES	\$	133,000.00
UNALLOCATED	\$	72,430.00

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MAHLER INHERITANCE - FL	JND 40	
REVENUE		

EXPENDITURES	\$ 150,000.00
USE OF PRIOR YEAR RESERVES	\$ 150,000.00
NET REVENUES LESS EXPENDITURES	 0.00
AL DOT GRANT FUND - FUND 47	
REVENUE - SIDE WALK HWY 25 PROJECT	\$ 684,875.00
EXPENDITURES - SIDE WALK HWY 25 PROJECT	\$ 684,875.00
NET REVENUES LESS EXPENDITURES	0.00

ADOPTED AND APPROVED THIS \_\_\_\_\_DAY OF SEPTEMBER, 2023

MAYOR ATTEST:

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CITY CLERK

#### REVENUE 5,690,525.00 GF POLICE 71,200.00 IMPACT 125,000.00 53,900.00 FIRE 69,950.00 CEMETERY SANITATION 794,000.00 AGING 12,650.00 87,900.00 PARK and REC **RECYCLE CENTER** 9,600.00 790,000.00 90% of 1 Cent (MDCD) 80,000.00 10% of 1 Cent VALLOCYCLE 600.00

\$ 491,656.73	ARPA FUNDING
\$ 8,276,981.73	

#### **OTHER FINANCING SOURCES (USES)- TRANSFERS**

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\$ 60,000.00	TRANSFER FROM COURT
\$ (790,000.00)	90% OF 1 CENT EXPENSE
\$ (80,000.00)	10% OF 1 CENT EXPENSE
\$ (54,654.00)	FIRE TRUCK REPAYMENT RESERVE
\$ (70,776.00)	LIBRARY REPAYMENT RESERVE
\$ (304,800.00)	TRANSFER TO LIBRARY
\$ (1,240,230.00)	TOTAL NET TRANSFERS

#### RESOLUTION NO. 09262022-339 A RESOLUTION OF THE CITY OF MONTEVALLO, ALABAMA ADOPTING ITS 2023-2024 FISCAL BUDGETS

Whereas, Generally Accepted Accounting Principles (GAAP) recommend municipalities approve an annual financial budget:

#### NOW THEREFORE BE IT RESOLVED BY THE CITY COUNCIL OF MONTEVALLO, ALABAMA, AS FOLLOWS 1. The Council hereby adopts the following:

TOTAL REVENUES	\$ 9,499,067.73
TOTAL EXPENDITURES	\$ (8,691,360.23)
TOTAL TRANSFERS IN	\$ 570,230.00
TOTAL TRANSERS OUT TO FUNDS	\$ 570,230.00
TRANSFER TO MDCD	\$ (790,000.00)
NET INCOME (LOSS)	\$ 17,707.50
USE OF PRIOR YEAR FUNDS	\$ 150,000.00
NET BUDGET	\$ 167,707.50

ADOPTED AND APPROVED THIS \_\_\_\_\_DAY OF SEPTEMBER, 2023

MAYOR ATTEST:

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CITY CLERK

	January-23	February-23	March-23	April-23	May-23	June-23	July-23	August-23	September-23	October-23	November-23	December-23	Total
Total Reports	93	103	93					98		-			740
Criminal Cases	61	68	65	55	71	46	62	65					493
Non-Criminal	32	35	28	45	31	13	25	33					242
Traffic Accidents	12	18	12	15	15	10	8	13					103
Traffic Citations	116	100	88	86	135	48	114	86			i		785
DUI Arrests	8	11	3	7	7	5	11	4					
Public Intox Arr		0	2	0	0	2	0	3					
Alias Arrests	11	12	11	7	11	6	8	8					
Juvenile Arrests	3	3	-	0	0	0	0	1					
Misd Arrests	7	3	4	4	7	-	5	12					
Felony Arrests	1	3	3	2	4	0	2	1					
Total Arrest	31	32	26	20	29	14	31	29	0	0	0	0	212
Auto Thefts	0	0	0	0	0		0	0					
Burglaries	0	0	2	3	1	1	0	0					-
Auto Recoveries	0	0	-	0	0		0	0					
Auto Burglaries	2	0	0			-	1	0					-
Criminal Mischief	<b></b>		0	0	0	0	-	2					-
DV. Related	2	7	თ	5	8	4	5	7					
Assaults			2	2	<b>σ</b> 1		2	0					
Fraud/Forgery	ω	2	2	_	з	0	0	1					
Harass / Reck	o O	4	4	4	5		0	4					
Misc. Offenses	29	32	30	27	29	9	23	25					204
Robberies	N	0	0	0	0	0	0	0					
Sex Crimes/Other	0	N	<b>_</b>	ы	0	2	0	0					
Thefts / Attempts	ω	ω	7	7	3	7	3	4					37
Suicide / Attempts	0	0	0	0	0	0	0	0					
Deaths	N	0	<b>_</b>	2	0	0	1	1					

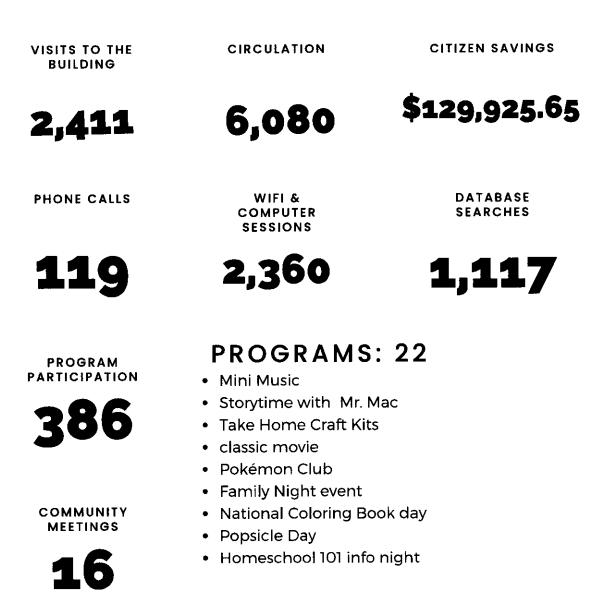
**APPENDIX 3** 

GENERAL ILLNESS	GAS									FIRE								FD ASSIST			FALL	EYE INJURY	EXTREMITY INJURIES	DRUG OVERDUSE	DROWNING	DIABETIC RELATED			CHOKING	CHEST PAIN			CARDIAC	BURN INJURIES	BREATHING PROBLEMS	BLEEDING	BACK PAIN/INJURY	ASSAULT	ANIMAL	ALTERED MENTAL STATU	ALLERGIC REACTIONS				ALARM	ABDOMINAL PAIN/INJUR	
	GASOLINE / DIESEL SPILL	VEHICLE FIRE	TRANSFORMER / POLE FIRE	RESIDENTIAL STRUCTURE FIRE	ELECTRICAL FIRE	DUMPSTER FIRE	COMMERCIAL STRUCTURE FIRE	BURN COMPLAINT	BRUSH / WOODS FIRE					OTHER AGENCY	MUTUAL AID	LIFTING ASSISTANCE	LAW ENFORCEMENT	CHILD LOCKED IN CAR	MULTI-STORY FALL	FALL FROM STANDING POSITION	FALL FROM ROOF		Ü		• • • • • • • • • • • • • • • • • • •			CHOKING - INFANT	CHOKING - ADULI		CARDIAC ARREST - INFANT	CARDIAC ARREST - CHILD	CARDIAC ARREST - ADULT		SWE				ANIMAL BITE/ATTACK	TATU	SN	RESIDENTIAL FIRE ALARM	MEDICAL ALARM	COMMERCIAL FIRE ALARM	CARBON MONOXIDE ALARM	JURY	
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HEART PROBLEMS		ω	0	2	6	8	7	<b></b>	   	28
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PERSON	PERSON DOWN	0	0	0	0	2	0	0	- <b></b>	6.3
PERSON STABBED or AT	АТ	0	0	0	0	0	<b></b>		0	N
POISONING		0	<b></b>	0	N;	0	-	0	0	4
POSSIBLE STROKE		2	ω	ω	N		6	N	ω	22
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# PARNELL MEMORIAL LIBRARY

### AUGUST 2023



### PARNELL MEMORIAL LIBRARY

**SEPTEMBER 11, 2023** 

- Our 2 homeschool 101 info nights went extremely well. New families seeing what our library has to offer in that regard.
- Had a great ending to August and looking forward to the new fall events.
- Torah the Birmingham Bull offered to come out and pass out popsicles for national popsicle day.
- September we still have our book character scavenger hunt going through this month, and library card sign up month, so come get a library card.
- I have already read to 3 classes at MES and have another one scheduled for this week, to talk about the importance of libraries, and to put a friendly face with the library. Hopefully to continue making this a monthly thing into the school classrooms.
- Family fun night was cheese pizza night and was a huge event.
- Today kicked off our Homeschool Hub with the mayor, and we had a big group of 40. Our next homeschool hub will be all about apples. We also have several other community helpers and businesses lined up as well.
- Mini Music is tomorrow at 10 AM, Pokémon at 3, and we will have a take home sweets and eats kit, while supplies last.
- This Friday is national play doh day, so come in for a free mini play doh as well as join our new program play doh and Lego! We will have Duplo blocks, medium size Legos, and tiny Legos so perfect for all ages.
- Unfortunately, the Library wasn't able to represent at Tinglewood this year, but hope to next year and future city events.
- Next week, I will be attending the Association for Rural and Small Libraries conference in Kansas, so I won't be in office from Sep. 19th-23rd.

APPENDIX 5



### City Council Meeting: September 11, 2023

#### Ms. Sarah Hogan, program director provided the following report:

- September: Suicide Prevention Month- working on social media post and peer designed videos with MHS broadcast students
- Tinglewood: We had great interaction with the community and gave away of a lot of information and resources.
- Legislation: Thank you to Representative Kenneth Pascal for stopping by our booth to speak about our needs and notifying us of law changes that went into effect last month: Psychoactive cannabinoids shall not be sold, distributed, marketed or possessed by any one under the age of 21. All items must be located in an area which individuals under 21 can not access the items. Fines for possession will be not less than \$50 and not more than \$200. On a third conviction and subsequent conviction shall be fined \$400. Community service may be assigned by a Judge in lieu of fines. Must be in child-resistant containers.
- SPOT Trailer: After advocating, we have received approval to spend unobligated funds from our 1<sup>st</sup> year of funding unused due to Covid to offset costs of the trailer. Unfortunately, the funds will still not cover the cost of a truck to haul it but will assist in freeing up other funds for additional activities. We hope to unveil the trailer at National Night Out.
- <u>Coalition Meeting:</u> We had to cancel our meeting last week due to technology issues, thank you to Lisa for assistance in helping to correct the situation and we will be rescheduling soon.
- October Events: We continue to work hard on our October events, I hope you have marked your calendars. Thank you to Lucky's for painting their windows to highlight some these events.



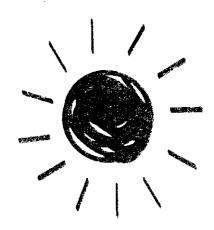
					2	2023						
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ADA	46	46	47	51	52	81	82	62				
	-			-	2	2022						
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	37	45	46	43	47	69	64	44	45	43	43	44

### After School Care:

- Stella Jones donated \$1500 in honor of Johnny Holsemback
- Greg and Amy Campbell also donated \$300 in honor of Johnny Holsemback
- We received other donations this month from Dixie Decorations and Montevallo Presbyterian Church.
- We have two more Junior Staff signed up since we started the school year!



### **Project Learn**:



 Members have time to do their homework, and are offered homework help from our Junior Staff.

### Anti Bullying:

Members had an open discussion about the different type of bullying and how to handle each type.

### **Healthy Habits**:

 We went over hygeine regiments with each age group, and created hygeiene checklists for each member to take home.

### Positive Actions:

 Each group played the "Gratitude Game" where each member drew a piece of colored paper out of a bag, and different colors prompted different questions. Each question asked to name a specific person, place, or thing that they were grateful for.



# **Club News**

- Our Two Bike racks have been installed!
- Our Water bottle filling station is up to 2828 water bottles saved!
- The University of Montevallo's track team has started volunteering with us every Wednesday!
- We are really getting the ball rolling our Youth of the Year candidates, and solidifying essays and applications!



# Youth of the Month:



## **Allie Kelley**

Allie has been a member of the club for almost 2 years now, and regulary attends

> everyday! Favorites:



color: teal snack: Takis hobby: dance club: talent show







# Elbow tag with the UM track team!

## Who won? club kids or UM track?







### Reduce, Reuse, and Recycle!

We love using old boxes for crafts!

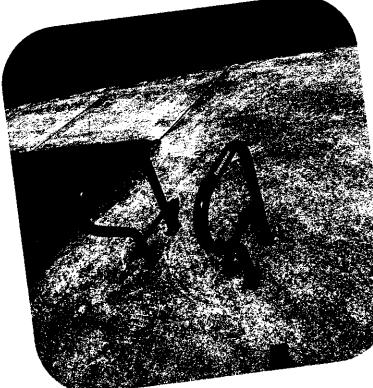








# 2828 bottles& counting!



# Bikeracks are in!

#### Montevallo Chamber of Commerce Council Report Sentember 11, 2023

1) Tinglewood Festival 2023 wrap-up.

APPENDIX 7

2) Taking Pre-Orders for **Montevallo Pecan Sale** / one pound bag of shelled pecans \$13.00 each / deadline Oct. 16 with a pick-up date before Thanksgiving. Benefits the Montevallo Community Grant Fund

3) EV Charging Station Ribbon Cutting / Thurs. Sept. 14 / 10am / 550 Main St.

4) Sept **Montevallo Chamber Luncheon** Wed Sept 20 "Back to School" Guest Speakers from MES, MMS & MHS / Parnell Library with networking at 11:30am & lunch at noon \$15. ea. RSVP by Mon Sept 18 to 205-665-1519 or <u>montevallochamber@gmail.com</u> Luncheon Catered by Southern Sweets / Luncheon Sponsor- Regions

5) Montevallo Chamber will be at **National Night Out** on Tues Oct 17, 5:30-7:30pm, Pecan Grove @Orr Park with prizes, free popcorn and Barney!

6) Montevallo Hometown Halloween will be Tuesday October 31, 3:30-5pm, Downtown.

7) Mark your calendar -

2023 Montevalio Christmas Parade, Thursday Nov 30, 6pm



Adele Nelson Executive Director Montevallo Chamber of Commerce P.O. Box 270 Montevallo, AL 35115 205.665.1519 office

www.montevallocc.com



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Alabama Historical Commission 468 S. Perry Street Montgomery, Alabama 36130-0900 Voice: (334)242-3184 Fax: (334)262-1083 www.ahc.alabama.gov

<b>Historical M</b>	larker Ap	plication
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Property Information:							
Property Name: Ward Chap	el A. M. E	. Church					
Street Address: 765 West S	Street						
<sup>City:</sup> Montevalio	County: S	helby	<sup>Zip:</sup> 35115				
Contact Person Name: James	Salter						
Contact Phone Number: 205-30	Contact Phone Number: 205-306-4671						
Contact Email Address: james_	a_salter@	yahoo.com					
Contact Mailing Address: P.O. B	ox 415						
<sup>City:</sup> Montevallo	State: AL		<sup>Zip:</sup> 35115				
Historic Register Information:							
Not Listed on a Historic Register							
Alabama Register of Landmarks & Her	itage	Date of Listing:					
Individually Listed		Name of Listing:					
Historic District		Name of Historic Distr	ict:				
National Register of Historic Places		Date of Listing:					
Individually Listed		Name of Listing:					
Historic District		Name of Historic District:					
Alabama Historic Cemetery Registe	r	Date of Listing:					
Size of Marker Requested (Height	t by Width):						
24" × 30"	30" x 42"		Plaque (16.5" x 16")				
\$2010 Same text on both sides		ne text on both sides	<b>E</b> \$575				
\$2250 Different text on both sides \$3210 Different text on both sides							
Size of Post Requested: 7 or	0' (add \$25	)					

Type of Seal Requested:			· · · · · · · · · · · · · · · · · · ·					
Alabama State Seal	Black Heritage	Council Seal	Cemetery Register Seal					
Optional Items:								
Photographs:								
None 4" x 6"	5" × 7"	8" × 10"	☐ 11" x 14" ☐ 20" x 24"					
QR Code:		···						
☐ None	QR Code (Plea	se provide link.)						
Proposed Marker Narrative: (use additi	Proposed Marker Narrative: (use additional sheets if necessary)							
Ward Chapel A.M.E. Church, Montevallo, organized in 1872 has been designated as a significant African American historic site by the Black Heritage Council of the Alabama Historical Commission Sponsored by the City of Montevallo								
		2023						
Location of Marker: For locational information, please visit Google M Google should provide you the latitude and long	Location of Marker: For locational information, please visit Google Maps, search for the street address, then right click on the spot the marker will be placed. Once you do this Google should provide you the latitude and longitude, which should look like this 32.37203, -86.30751.							
Latitude: 33.09962		Longitude -86	6.86555					
Billing Information:		•						
A sponsoring individual or organization is require Name:	ed to pay Sewah Studios upo	on involce. Do not se	and money to the AHC.					
Address:								
City:	State:	· · · · · · · · · · · · · · · · · · ·	Zip:					
Phone Number:		I						
Email Address:								
can be delivered to a residential or commercial d for specific shipping questions.	s curbside delivery to a <u>com</u> lelivery address by UPS (no	mercial delivery addra extra charge for resid	ess. Add \$75 for shipping to a residential address. Plaques dential address). Contact Sewah Studios at (888) 557-392-					
Ship to the Attention of:								
Company Name:	······································							
Street Address (No P.O. Boxes):								
City:	State:		Zip:					
Phone Number:		1						

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#### Approval of Property Owner(S):

It is the responsibility of the applicant requesting the marker or plaque to secure approval of the property owner, whether it is privately or publicly (city, county, state, or federal governments or right-of-way) owned. Property owner or designated official's signature(s) must appear below. We request that the Alabama Historical Commission approve this Historical Marker and/or Plaque.

Sponsoring Organization

Signature of Official of Sponsoring Organization

James A, Salter

Property Owner or Authorized Officer (Please print)

rized Officer

2023

Date

Return this Form and Any Attachments to: Alabama Historical Commission Attn: Leanne Waller-Trupp 468 S. Perry Street Montgomery, Alabama 36130-0900 Leanne.Trupp@ahc.alabama.gov



Alabama Historical Commission 468 S. Perry Street Montgomery, Alabama 36130-0900 Voice: (334)242-3184 Fax: (334)262-1083 www.ahc.alabama.gov

### **Historical Marker Application**

Property Information:					
Property Name: Shiloh Missionar	~ Baptist C	hurb			
Street Address:					
304 Selma Rd.	· · · · · · · · · · · · · · · · ·	7:			
	helby	Zip: 35115			
Contact Person Name: Rev. John W. J	Adams, Sr.	Pastor			
Contact Phone Number: $205 - 9.08 - 20$					
Contact Email Address:					
Jadams 6463@	gmail. com				
Contact Mailing Address: 304 Selma T					
City: State:		Zip:			
Montevallo AL		35115			
Historic Register Information:					
Not Listed on a Historic Register					
Alabama Register of Landmarks & Heritage	Date of Listing:				
Individually Listed	Name of Listing:				
Historic District	Name of Historic Dist	rict:			
National Register of Historic Places	Date of Listing:				
Individually Listed	Name of Listing:				
Historic District	Name of Historic District:				
Alabama Historic Cemetery Register	Date of Listing:				
Size of Marker Requested (Height by Width):					
24" × 30" 30" × 42"	······································	Plaque (16.5" x 16")			
	ne text on both sides	<b>∑</b> \$575			
\$2250 Different text on both sides \$3210 Diff	\$2250 Different text on both sides \$3210 Different text on both sides				
Size of Post Requested: 7' or 10' (add \$25)					

Type of Seal Requested:		Black Herita	ge Council Seal		Cemetery Register Seal			
			T					
Optional Items:								
Photographs:		· · · · · · · · · · · · · · · · · · ·			[			
None	<b>4</b> " × 6"	5" × 7"	<b>8" × 10</b>	[]   " ×  4"	20" × 24"			
QR Code:			Name and the line of the line		· · · · · · · · · · · · · · · · · · ·			
None			lease provide link.)					
Proposed Marker N	arrative: (use addi	tional sheets if necess	sary)					
		Shiloh Missic	onary Baptist Chur	ch				
	• •		_	99 has been designate				
-		an historic site by t	he Black Heritage	Council of the Alabam	a Historical			
Commissi	on		Changered by the	City of Montovallo 20	כר			
			sponsored by the	City of Montevallo 20	25			
				· · · · · · · ·				
Location of Marke	n please visit Google	Maps, search for the stree	a address, then right clic	k on the spot the marker will	e placed Once you do this			
Google should provide ye Latitude:	ou the latitude and lot	grude, which should look	Longitude					
<u>. 33.</u>	09572			36.86491				
Billing Informati	ON:	red to pay Sewab Studios	upon invoice. Do not s	end money to the AHC.				
Name:								
	1 of Mo	ntevallo						
Address: 541	Main	S <del>1</del>		, .,				
City:	( )	State:		Zip: 35115				
Phone Number:	/allo							
	205-665	-2555						
Email Address:	un citu	ofmontera	Ilo. com					
For historical markers, pi	repaid delivery service idential or commercial	is curtiside delivery to a delivery address by UES		ess /Adda7ShoFshoppingaoa denial/address/s@ontactSev/	residential address riaques h Scidios ac (898) 557-3924			
for specific shipping ques	tions.							
Ship to the Attention	not: Rust	~ Nix. N	layor					
Company Name:	Cil		0					
Street Address (No	LITY OF	Monteval	10					
Street Address (NO	r.c. boxes).							
541 M	ain Jt.	State:		Zip:	<u> </u>			
City: Monteva	2/10	AL		35115				
Phone Number:	Phone Number:							
2	05-665	- 2000	··					

#### Approval of Property Owner(S):

It is the responsibility of the applicant requesting the marker or plaque to secure approval of the property owner, whether it is privately or publicly (city, councy, state, or federal governments or right-of-way) owned. Property owner or designated official's signature(s) must appear below. We request that the Alabama Historical Commission approve this Historical Marker and/or Plaque. Sponsoring Organization Signature of Official of Sponsoring Organization Date Return this Form and Any Attachments to: Alabama Historical Commission Atta: Leanne Waller-Trupp 468 S. Perry Street Montgomery, Alabama 36130-0900 Leanne, Trupp@ahc.alabama.gov

### Shiloh Missionary Baptist Church

### History

In 1877, Henry Underwood and his family moved to Montevallo from Autauga County. They had three children, two sons, Henry Jr. and Lazarus and a daughter, Helen. They were members of a Baptist church in Autauga County, but there were no Baptist churches in Montevallo. They attended the Methodist church along with other Baptists who lived in the area.

Henry Underwood contacted a friend of his in the ministry, Reverend Issac Witherspoon, from Demopolis. He and his daughter Lucy, who was a schoolteacher moved here. Lucy was hired as a teacher in West Calera.

The need for a place of worship was in the minds of all. Reverend Witherspoon began the organization. They had no building to worship in, so Mr. Will Reynolds gave them permission to use one of his houses near the depot. They later purchased the house.

Some of the early church organizers were Reverend and Sister R. L. Ash, Sister Henrietta Allen, Reverend Joe Pinkard, Sister Nellie Vassar, Sister Charlotte Nunn, Brother T. D. Wesley, Brother Elbert Cottingham, Sr., Brother Chag Harris, Brother Tony Smith, Sr., Reverend G. Vassar, Brother A. A. Scott. Sister Martha Jane Heighfield was the first mother of the church.

In 1899, Shiloh Baptist Church was organized and Reverend Witherspoon was the first minister. Brother Tony Smith, Sr. was chairman of the deacon board, Sister Henrietta Allen was president of the Missionary Society, Sister Sue Ash was secretary, and Sister Charlotte Nunn served as secretary also.

The church progressed under the leadership of Reverend Witherspoon and he served faithfully until his daughter accepted a job in Ensley, Alabama. He resigned and they moved to Birmingham.

After Reverend Witherspoon's resignation, Reverend U. S. Miller was called as pastor. A conflict among members resulted in a split in the congregation. Reverend Miller and some of the members left Shiloh and organized Pilgrim Rest Baptist Church.

1

Shiloh called Reverend J. F. Brooks. His dream was to relocate the church. They sold the house that was used for worship services to Brother Oscar Miller for \$300.00 and borrowed \$500.00 from Merchants and Planters Bank. With the money they built the first wood structure building on this present site for \$750.00.

In 1913, the church was rebuilt at its present site. The site itself has a place in the history of the City of Montevallo. It is written in the history of Montevallo that it is on this spot or about this spot that the first white settler of this town built his house.

Reverend Brooks was called to another church and Shiloh's pulpit was vacant once again.

Reverend P. T. Bowden was called to Shiloh. He served as pastor for six years.

Reverend Jim Peoples followed Reverend Bowden and served as pastor for less than two years.

Reverend E. G. Massey was called to Shiloh and served three and one-half years.

In 1925, Reverend William Henry Harrison became the pastor and served for twentysix years. On April 11, 1939, Shiloh was destroyed by a tornado and was rebuilt during the same year. The deacons were Brother Alex Scott, for whom Scott Village is named, Brother Jesse E. Peoples, Brother Price Ward, Brother Charlie Webb, Brother James Parker, Brother Yancy Conwell, Brother Joe Bolden, Brother Jake Boyle, and Brother Mitchell Coger. Reverend Harrison, the officers and members were able to add a basement and purchase pews for the sanctuary. In 1951, Reverend Harrison died while still serving as pastor.

After the death of Reverend Harrison, the church called Reverend N. H. Smith in 1951. He stayed at Shiloh until 1953. He was called to New Pilgrim Baptist Church in Birmingham. Under his administration the membership was encouraged to be more liberal in giving and stewardship as a whole. The church was just emerging from the Depression and felt that they were doing their best. The members learned that the more they gave the more the Lord gave them.

After Reverend Smith left Shiloh, the members were a little discouraged after having a single pastor for such a long time, then losing another one so quickly.

Reverend E. B. Paschel was called by the church in 1953. He was the son-in-law of Reverend W. H. Harrison. He served until 1958 but was called to a church in Macon, Georgia. Within less than half the time served by Reverend Harrison the church found itself having had two pastors who served Shiloh well and moved on.

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Shiloh called another young minister, Reverend Edsel M. Davis, in 1958. During his administration many projects were accomplished. A new roof, a lighted cross, awning over the front door, new carpet, folding chairs and a pulpit set were added to the church. The membership had a desire to work, as they had not for some time. Under Pastor Davis' leadership, Reverend Andrew Lilly, Sr. served as an associate minister. All auxiliaries were functioning well. Brother Tom Billingsley and Brother Henry Tolbert had been added to the board of deacons. Brother Rogers, Brother James Coger, Brother James Cottingham, Brother Charlie Cunningham, Brother Arthur Small, Brother McCurtis Smelley, and Brother Henry Poe were ordained as deacons. By this time the Lord saw fit to move Reverend Davis on to anther part of His vineyard, Hobson city in 1963.

Reverend George W. C. Richardson followed Reverend Davis, and he too, was a young minister just out of Selma University. He served as pastor from 1963-1966. Reverend Richardson was an organizer but by the time he was ready to move forward with his organization, he was called to Mt. Hebron in Bessemer. During his tenure as pastor, the church purchased the property next to the church from the Peoples family. Brother Clifton Lacey, Sr., and Brother King David Nunn were ordained to the board of deacons.

In 1966, the church called Reverend John Speigner as pastor. The church-purchased an organ under his administration. Two deacons were ordained, Brother Earl Cunningham and Brother Daniel Parker. He served until 1969.

For several months after Reverend Speigner, the church was without an elected pastor. Reverend Rogers L. White being a newly ordained minister in one of our sister churches was asked to take charge of our services until we could select another pastor. He worked patiently for several months. Shiloh, being a full-time church, did not give this young minister the time to visit other churches, as he desired, so he finally told the membership that they needed to call a new leader. Stating that he did not mean that he should be called, but someone to speak for us as an elected minister. The pulpit committee was going from church to church listening to and talking to different ministers until one day one of the members said to the committee, "Why don't we offer it to Reverend White?" The committee stopped their search and made plans to offer the church a chance to vote on Reverend White for pastor.

In 1969, Reverend R. L. White was called as pastor of Shiloh Baptist Church. He was a spirit-filled energetic person who was never satisfied with just getting by but strived to get the most out of himself and the whole membership.

Some accomplishments made under his administration were: addition to back for restrooms and lounges for men and women, new ceilings, windows, a water fountain, refrigerator, bulletin board, central heat and air, a piano and new floor covering. Three deacons, Brother Eddie Tyus, Brother E. B. Cottingham and Brother Gus Bolling were ordained. Brother Earl Cunningham later resigned from the board of deacons.

Reverend White served as pastor of Shiloh for eight years. The Lord saw fit to move Reverend White on to another part of His vineyard. He was called to Peace Baptist Church, Pratt City in 1977.

Reverend Charles R. McKinney was called to Shiloh in 1977. The church was once again moving on. He ordained three deacons, Brother Jube Gilbert, Brother Louis Lacey and Brother Adam White. During his tenure the church was able to pay off the indebtedness. He served as pastor of Shiloh until 1984.

In 1985, Reverend Rogers White was called again to pastor Shiloh, the 15<sup>th</sup> pastor in the history of Shiloh. Reverend White's tenure the first time he served as pastor of Shiloh was eight years.

In 1986, the Tennessee School of Religion Montevallo Extension was organized at Pilgrim Rest Baptist Church and later moved to Shiloh in 1989 where Pastor White served as Chancellor.

In January 1991, four deacons were ordained, Brother Kirk Cunningham, Brother Louie Cottingham, Brother Franklin Gilbert and Brother Lawrence Lilly, Sr.

Pastor White had a vision to lead Shiloh in the building of a new Sanctuary. In 1995, the foundation was laid for the new structure.

The facility blends the past and present incorporating much of the handcrafted woodwork from the previous sanctuary's interior; the construction of a free-standing

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bell tower that houses the original church bell, as well as the artistic addition of a 12by 14-foot acrylic mural depicting "The Baptism" rendered by our own, Deacon Ronnie McCary. Under the leadership of Pastor White, associate pastors Reverend George Craig, Reverend Cary Lilly, Reverend Kelvin Todd, Reverend Clint Walker, and Reverend Roger Shack, deacons, Brother Jube Gilbert, Brother King D. Nunn, Brother Elbert Cottingham, Brother Louie Cottingham, Brother Frank Gilbert, Brother Lawrence Lilly, Sr., Brother Eddie Tyus, Brother Louis Lacey, Brother Willie Brantley, Sr., Brother Arthur Small, Brother Earl Cunningham, Brother Kirk Cunningham and Brother Lee Bullard; trustees, Brother George Young, Brother J. Ruby Cathey, Sister Minnie White, Sister Jeanie Todd, Sister Bernice Bolling, Sister Sarah Lacey, Brother Anthony Young, Sister Jewel Dailey, Sister Elizabeth Jones, Brother Willie Brantley, Jr., Sister Kathlyn Lathion and Sister Carrie Davis; clerk, Sister Sylvia Watson; treasurer, Brother Earl White, and secretary, Sister Pamela Johnson, we moved into the new building in May 1996. The builder for this project was Potter Construction.

Some of Reverend White's accomplishments include the establishment of a praise dance group, a musical ensemble, a leadership training class for men, a leadership training class for church officers, a Sunday school couples class, new member orientation class, early morning (8:00 a.m.) and mid-week service, marriage counseling, development of the Nurse's Guild, rejuvenation of the Red Circle and a weekly broadcast ministry on WBYE Radio in Calera. Since moving into the new Sanctuary, we have purchased choir robes, cordless microphones for the sanctuary, a freezer for the kitchen, portable storage building, church sign and replaced one of the heating and cooling units. He also increased the size of his office staff and computerized the church records, which enabled the church to become totally compliant with tax laws.

Shiloh Baptist Church supported community service and foreign mission through their participation with Habitat for Humanity projects and New Tribes Mission, which supports the ministry of Edjuana Cole in Guinea, West Africa.

Five deacons were ordained in November 2003, Brother Willie Brantley, Jr., Brother Lance Cottingham, Brother Ronnie McCary, Brother Terry McCary and Brother Henry Pope. In November 2004, two ministers were ordained, Reverend Lee Bullard and Reverend Byron White.

One of Pastor White's favorite scriptures was, "Where there is no vision, the people will perish" (Proverbs 29:18). Pastor White was truly a visionary in every sense of the

word. His plans included a plan to pay off the church mortgage in five years and opening a daycare center for children and the elderly.

On May 6, 2007, after serving two terms as pastor of Shiloh Missionary Baptist Church totaling 30 years of loyal service, Paster Rogers L. White departed this life.

Reverend W. Ross Williams was installed as Shiloh's sixteenth pastor. With a practical yet insightful and charismatic preaching style, Pastor Williams was dedicated to ministering to the masses through the preaching of the Gospel, teaching, counseling, developing and implementing new ministries which included the Brotherhood, Youth Network and Third Sunday Fellowship Dinner while maintaining a sound and sincere leadership presence. Pastor Williams' ministry was marked by our vision statement "A Church with a Vision, a Message, and a Mission." Pastor Williams resigned October 31, 2014.

Once again Shiloh was vacant and in search of another leader. The members of Shiloh appointed a committee to begin its search for our next pastor. Shortly afterwards, Reverend John W. Adams was appointed to serve as interim pastor of Shiloh. Reverend John W. Adams was called to preach on April 20, 2015.

Pastor John W. Adams is the seventeenth and current pastor of Shiloh Missionary Baptist Church. He was installed on June 14, 2015. Under his direction, Old Fashioned Saturday was reinstated, Monthly Saturday Bible Study was established, the Youth Department was reorganized to include a Youth Choir, a Youth Retreat, along with several other youth participatory activities. A Male Chorus was organized; the church sound system was restored. The stairs leading to the sound room were replaced, a new roof was added, the fire sprinkler system was restored, the air conditioner unit was replaced, new lighting was replaced throughout the church, the freezer and refrigerator were replaced, new doors were added to the pastor's office and the kitchen entrance, the Sunday School classrooms have been updated, and a new church logo was created.

These and many other things were done for the advancement of the Shiloh Missionary Baptist Church family.

APPENDIX 9



August 9, 2023

5 **र** –

Steve Gilbert City of Montevallo 541 Main Street Montevallo, AL 35115

#### PROPOSAL FOR ARCHITECTURAL SERVICES FOR RENOVATIONS OF PERRY HALL (Mahler House) Montevallo, Alabama

Dear Steve:

I appreciate the opportunity to submit this proposal for Architectural services for the renovation and redevelopment of the Mahler House. This proposal is based our discussions in our meeting, I have outlined the following Scope of Work:

#### Scope of Work

- 1. Renovation of the existing house to into a Welcome Center.
- 2. Program to be as follows:
  - a. Welcome Center area and gift shop
  - b. New ADA compliant restroom
  - c. Break Area with counter
  - d. Office
  - e. Storage
  - f. 2<sup>nd</sup> floor apartment
- 3. New ADA ramp to main level from parking area
- 4. New HVAC system and lighting
- 5. New interior finishes
- 6. Complete exterior renovation including windows
- 7. Project Budget to be less than \$300,000.00.
- 8. Structural Services will be provided by Christy Cobb in a separate proposal.

#### **Basic Services**

Based on the Scope of Work outlined above the following Basic Services will be provided:

- 1. Architectural Services for Construction Documents necessary to obtain local agency approvals and provide the contractor sufficient information to perform the Work.
  - a. Preparation of Construction Drawings and Specifications consisting of Plans, Elevations, Sections, Details, window schedule and Project Manual (which will include the Invitation to Bid specs).
- 2. Mechanical, Electrical and Plumbing engineering services.
- 3. Bidding & Permitting Services, which will include assistance in evaluating the bids, providing a recommendation for Contractor selection, and coordination with the City of Montevallo during permitting and plan review stages.
- 4. Normal Construction Administration services during Construction of Project, which will include field observations, submittal review, and review of Contractor's Application for payment.

#### Services Not Included

The following Services are not included in this proposal and will be considered as Additional Services if requested by the owner:

- 1. "Value Engineering" revising the scope of Project after Construction Drawings are complete.
- 2. Environmental, Hazardous Material and Geotechnical services, reports etc.

#### Compensation

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Rob Walker Architects, LLC propose the following Compensation for performing the above referenced services:

1. Basic Services will be as follows:

Architectural Services	\$7,500.00
MEP Engineering Services	\$6,500.00
Bidding and Permitting Services	\$3,500.00
Construction Administration Services	\$7,500.00

- 2. An employee corresponding to the Schedule of Hourly Rates below will perform Optional Services at an hourly rate.
- 3. An employee corresponding to the Schedule of Hourly Rates below will perform owner-required modifications to previously Owner-approved documents at an hourly rate.
- 4. Typical reimbursable expenses such as printing, plotting, courier services, postage, additional travel etc. as associated with the Project will be billed concurrently at a rate of 1.15.
- 5. Mileage for trips will be invoiced at the current standard government reimbursable rate.
- 6. Billing will be monthly based on percentage of total fee, based on work completed as defined in the Project Phase Schedule.

#### SCHEDULE OF HOURLY RATES

(\*Hourly rates shall be annually adjusted in accordance with normal salary review practices.):

Principal Architect	\$250.00 / hour
Project Architect	\$175.00 / hour

This fee proposal is based on the above outlined Scope of Work. If this Scope of Work is not accurate, please let us know and we will provide a revised proposal to you. Should the Scope of Work change after this proposal is approved, these revisions will be treated as additional services.

We are excited about this project and look forward to the opportunity of working with you. If this Proposal meets with your approval, please sign one copy and return it to our Office. If you have any questions regarding this proposal, do not hesitate to contact this Office and thank-you again for this opportunity.

Rob Walker Architects, LLC

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Rob Walker, NCARB, AIA Principal

APPROVED:

By\_\_\_

Date



About Me	I moved to Montevallo in 2016 upon accepting a job at the university. i fell in love with the city and bought a house here right away, and became involved with both our city government and the campus community as soon as I was able. I have attended meetings, served on boards and attended our city-wide events.				
Work Experience	University of Montevallo, 2016-current Faculty Member University of Houston, 2010-2016 Graduate student and adjunct professor				
	Hartford Insurance, 2007-2010 Claims Adjuster Amerisource Funding, 2005-2007 Relationship Manager Texas House of Representatives, 2005 Adminstrative Assistant to Rep. Glenda Dawson				
Volunteer Experience	<b>2016-2020</b> Vallocycle Board	Attended meetings and community rides, volunteered at city events such as ArtFest, ArtStalk and Tinglewood.			
	<b>2016-2020</b> Housing Abatement Board	Attended meetings and served as volunteer secretary. Sent meeting minutes and coordinated with our abatement officer.			
	<b>2010-current</b> PEO	Assisted this women's group in fundraising for scholarships for women and volunteering in the community.			
	<b>2016-current</b> American Association of University Women	Assisted this women's group in fundraising for scholarships for women, book groups, Parnell Library and volunteering in the community.			

#### **Education**

#### **APPENDIX 11**

Doctor of Business Administration (2025 projected) University of North Alabama (AACSB Accredited), Florence, Alabama

Masters of Business Administration, 2016 University of Montevallo (AACSB Accredited), Montevallo, Alabama Honor Society Memberships: Phi Kappa Phi, Beta Gamma Sigma

Bachelor of Arts in Political Science, 1995 Auburn University, Auburn, Alabama

#### Specialized Skills & Knowledge

- ISO 9000 Certified (Internal Audit)
- Proficient in Microsoft Office (MS Access, MS Excel, MS PowerPoint, MS Word)
- Proficient in Crystal Reporting and ACL; with the ability to quickly and efficiently adapt to new reporting technologies and methods
- Proficient in use of Canvas and Banner higher education administration software
- Proficient in utilizing FareHarbor reservation and scheduling software
- Capacity to research, learn, and implement ever changing regulations
- · CMS certified data validation auditor

#### **Professional Affiliations**

Institute of Internal Controls - Certified Internal Controls Auditor (CICA) Institute of Internal Auditors - Birmingham Chapter Board of Governors (two years) Leadership Development Association (LDA) of Blue Cross and Blue Shield of Alabama

#### **Instructional Experience**

#### Adjunct Instructor of Management, Central Baptist University, August 2023 - Present

- Delivered online course instruction in Computer Applications
- Proficient in use of Canvas and Banner higher education administration software
- Knowledgeable of student privacy regulations, such as FERPA

#### Adjunct Instructor of Management, University of Montevallo, August 2021 - Present

- Delivered live course instruction in Principles of Management & Organizational Theory
- Conducted interdisciplinary instruction in the class "Social Entrepreneurship & Sustainability," with emphasis on Management, Non-Profit Studies and Environmental Studies
- Offered voluntary supplemental instruction weekly for Principles of Management & Organizational Theory students
- Scheduled to teach 2 independent studies in online format in Fall 2023
- Proficient in use of Canvas and Banner higher education administration software
- Knowledgeable of student privacy regulations, such as FERPA

#### Substitute Teacher, Kelly Services, 2017 - 2020

- Served as substitute teacher in local elementary school, typically on Mondays
- Managed daily activities in classrooms from Kindergarten to Fifth grade, as well as in Art and Physical Education
- Knowledgeable of student privacy regulations, such as FERPA

#### Guest Presenter, CMS Benefit Integrity Conferences, 1999-2000 Guest Presenter, OIG/OI National Issues Conference, 1995-1997

- Presented educational sessions at Federal fraud conferences
- Served as subject matter expert in various ever-changing government regulations, including Medicare Part D operations and data reporting requirements
- Presented formal educational sessions at multiple Federal Benefit Integrity Conferences

#### **Professional Experience**

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#### Senior Compliance Specialist, ValueHealth Beneft Adminstrators, June 2022 – Present

- Specialize in benefit compliance for member groups based on Federal guidelines
- Manage the annual external System and Organization Controls (SOC 1 & 2) Type II
- Plans and conducts annual disaster recovery and business continuity activities and documents results for the SOC Audit
- Serves as a subject matter expert (SME) on compliance issues and coverage questions
- Manages corporate insurance information and annual renewal information in conjunction with the corporate assurance unit
- Manages the annual review and update of policies and procedures utilized by the vompny o ensure compliance with the Health Insurance Portability and Accountability Act of 1996 (HIPAA)

#### Operations & Product Manager, Southeast Wines LLC, Aug 2016 - June 2022

- Manage day to day operations of a small batch winery producing 4,000-6,000 cases annually
- Conducted marketing and awareness activities including representing the Shelby County vineyard at the State of Alabama Tourism Bash
- Perform data analysis on sales and distribution figures to determine marketing initiatives
- Perform monthly reporting for state and federal business tax submissions
- Initiate ad hoc reporting to provide management with key data points to drive changes in sales
- Oversee and manage visitor interactions and group programming, including sales and special events
- Provide feedback for the development of the annual budget and production plan
- Oversee operation of five acre vineyard
- Represent the company's distillery operation products in the market place, including performing tastings and sales calls with potential wholesale clients
- Developed and maintained excellent relationships with various retailers including restaurant, bars, and stores while managing inventory needs
- Utilize data from multiple reporting systems to track state wide sales and provide reporting information to the company owner for decision making purposes
- Act as liaison between distillery operations and the State of Alabama Alcohol Beverage Control to ensure compliance
- Manage the winery distributor agreement to ensure that product is available for wholesale clients
- Utilize well developed communication skills with wine maker and other management to ensure adherence to state and federal operating guidelines

#### Senior Compliance Analyst, OptumRx, May 2014 - Aug 2016

- Performed reviews of internal Medicare departments through the use of data reporting and analysis to ensure compliance with Centers for Medicare and Medicaid Services (CMS) standards and all applicable regulations
- Generated standardized and ad hoc reports from data collection systems to perform follow-up reviews and testing of corrective action plans to ensure successful implementation and correction of the underlying issue(s)

- Advised management by recommending corrective action plans based on audit findings using data extraction and analysis methods
- Led a team of 3 analysts to ensure timely completion of audit objectives while working remotely
- Conducted interviews with operational areas to gain a thorough understanding of their policies and procedures prior to audit engagement
- Provided feedback for the development of the annual audit plan

#### Senior Technical Business Analyst, The Burchfield Group, Feb 2011 - Aug 2013

- Authored client education blogs on CMS regulations and changes
- Worked both independently and with a team, including telecommuting and on-site client audits
- Developed and communicated best practices based upon multiple client interactions
- Conducted validation audits per CMS regulations, including responsibilities for audit planning, execution, review and completion of 15 clients annually
- · Reviewed policies and procedures, and offered recommendations for improvements
- Provided guidance to clients based upon CMS changes to program operations, including communication with CMS directly for interpretations as needed
- Assisted in development of corporate audit strategy based upon CMS regulations
- Performed outsourced reviews of client's Medicare departments using data reporting, analysis, and testing to ensure compliance with federal standards and regulations
- Developed corrective action plan recommendations for senior management using data extraction and analysis methods

#### Pharmacy Business Analyst, Blue Cross and Blue Shield of Alabama, Jan 2009 - Feb 2011

- Directed a team of associates in completion of prior authorization requests according to CMS requirements during transition to a new PBM
- Utilized well developed communication skills with management and other associates to insure adherence to operating guidelines
- Led project to improve efficiency by developing electronic storage methods to secure and maintain data required for compliance (Prior Authorizations, IRE Referrals, Transition notifications)
- Developed tracking and reporting methods to provide compliance information to management
- Developed and recommend policies and procedures, as well as leading implementation of recommendations
- Ensured ongoing compliance with federal rules and regulations governing the Medicare Part D program
- Served as primary contact and subject matter expert on Independent Review Entity (IRE) referrals and redetermination appeals
- Served as department subject matter expert on the CMS Prescription Drug Benefit Manual

#### Senior Auditor, Blue Cross and Blue Shield of Alabama, July 2002 - Dec 2008

- Reviewed the work performed by associates and provide guidance and instruction as needed
- Communicated with management concerning the status of audits
- Served as a liaison between operational divisions and external auditors to provide information and resolution to audit issues in a timely fashion
- Improved efficiency of the audit process by developing and maintaining electronic databases to track identified issues, corrective action plans, and resolutions
- Developed specialized reports at the request of management to monitor and manage associate workloads, and assisted in setting departmental priorities
- Utilized Crystal, ACL, Access and Excel to extract data relevant to the performance of audits, as well as providing specialized reporting to management for proactive audit use
- Provided recommendations for modifications to claims systems and processes to ensure compliance with corporate policies and best practices

- Applied extensive knowledge of claims processing system to research and investigate issues and concerns expressed by external customers
- Facilitated audits of claims performed by customers and external auditors, interpreting questions and issues and communicating resolution with internal and external constituents while ensuring the intent of group benefits are adhered to and claims are processed accurately and efficiently
- Served as HIPAA Divisional Privacy Representative and on the Blue Cross and Blue Shield Association Audit Enhancement Work Group

#### Advanced Internal Auditor, Blue Cross and Blue Shield of Alabama, Sept 2000 - July 2002

- Served in a leadership role on audit engagements by performing tasks related to planning, budgeting, review and completion of the audit
- Provided recommendations to management for improvements in system procedures, documentation and internal controls
- Performed special projects at the request of management, including design and execution of the annual risk assessment
- Developed audit programs for Medicare operations in order to assess compliance with Federal objectives and regulations while developing appropriate audit programs to address identified risks
- Utilized governmental resources, including the CMS Control Objectives, Budget Performance Requirements, and Change Requests, to accurately perform compliance audits
- Conducted internal operational and compliance audits of both Medicare and private business operations in accordance with the standards of the Professional Framework of the Institute of Internal Auditors

#### Fraud Investigator, Blue Cross and Blue Shield of Alabama, Jan 1998 - Sept 2000

- Supervised the work of other investigators to ensure the work performed was accurate and thorough
- Conducted provider/beneficiary outreach and education sessions state wide
- Communicated with federal law enforcement agencies regarding case referrals and sensitive information
- Conducted appropriate research and applied federal rules and regulations in conducting reviews of potential fraud cases
- Interpreted computer data to detect potential fraud and abuse using multiple database platforms
- Performed reviews of complaints filed and initiated investigations of possible fraudulent activity
- Conducted interviews with beneficiaries and providers to substantiate and document cases of potential fraud
- Served as the Security Officer for the Fraud unit, ensuring data and facilities were appropriately secured
- Served on the Medicare Y2K Planning and Preparation Team

#### Fraud Analyst, Blue Cross and Blue Shield of South Carolina, Mar 1995-Dec 1997

- Analyzed computer data to detect potential fraud and abuse
- Conducted reviews of complaints filed and initiated investigations of possible fraudulent activity
- Researched and applied federal rules and regulations in conducting reviews of potential fraud cases
- Interviewed beneficiaries and providers to substantiate and document cases of potential fraud
- Coordinated with various departments on issues involving program integrity and provider/beneficiary outreach and education

#### **Community Service**

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#### Volunteer, Montevallo Elementary School Parent Teacher Organization

- Served as Treasurer, 2 years
- Recruited volunteers and assisted with coordination of activities related to Fall Festival, Supper with Santa, and International Food Festival
- Volunteered in classrooms during teacher recognition events and kindergarten first week, 5 years

- Secured silent auction items for various Alumni Association events
- Managed Freddie the Falcon program, University Ambassador including scheduling and overseeing student mascots to ensure safety and welfare
- Worked athletic events, including basketball score table operations and conference tournaments

#### Volunteer, Auburn University Shelby County Club

- Former Scholarship Chair
  - Sought donations and planned fundraising activities to generate funds necessary to endow scholarship for Shelby County student to attend Auburn University
  - Created and distributed marketing pieces related to fundraising events, including Aubie Claus and Meet the Coach Kick-off Event
  - Planned, executed and obtained sponsorships for the annual scholarship golf tournament
  - o Gained knowledge of marketing, fundraising and compliance requirements

#### Other

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Chair of the Fundraising Committee for the inaugural 5K run for Paws for the Cause Co-Chair, Blood Drive Committee, two years

Participant and monetary contributor to various charity events supporting the American Heart Association, United Way, Junior Achievement, American Cancer Society, Juvenile Diabetes Foundation and Big Brothers/Big Sisters

Volunteer Little League Coach, Montevallo Parks and Recreation (2016-2022) Member Montevallo Parks and Recreation Roard, 2023 Present

Member, Montevallo Parks and Recreation Board, 2023 - Present

#### **References Available Upon Request**