

**North Florida Water Utilities Authority**

**Special Meeting**

**Agenda**

**April 17, 2025 10:30AM**

Columbia County  
Executive Conference Room  
971 W Duval St. Suite 145  
Lake City, FL 32025

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1. Call to Order
2. Pledge
3. Roll Call

Discussion and Action:

1. Selection of Executive Director of NFWUA and Approval of Compensation Package
2. Additional Necessary or Appropriate Action to further the Selection of Executive Director for NFWUA
3. Public Comment
4. Board Comment
5. Adjournment

# Shannon L. Roberts

sroberts1196@gmail.com  
919-780-1845  
Live Oak, FL 32064

## SKILLS

Grant Writing | Capital funding  
Project | Program management  
Strategy formation | Execution  
Due diligence | Rationalization  
Cost modeling | Analysis  
Recruitment | Team building  
Budget planning | Administration  
Security | Risk | Compliance

## EDUCATION

University of North Florida, BA  
Psychology, 1990

## PROFESSIONAL DEVELOPMENT

FEMA ICS 100,200, G300 Pre &  
Post, G400, 700 and 800  
TopGrading Recruitment  
SUPC Project Mgt Training  
Sales Operations Training  
Novell Engineer Certification  
Microsoft Network Engineer  
Coursework  
3M ATM Network Training

## SUMMARY

Seasoned leader with a proven track record for approximately nearly \$60M in funding awards for capital projects. Expert in grant writing and innovative research, coupled with exceptional team leadership and strategic execution skills. Demonstrated excellence in project management and compliance. Investor style thinking to drive critical projects to maximize budget efficiency and build quality.

## EXPERIENCE

### **Suwannee County BCC - Admin Associate – Live Oak, FL Jan 2018 - Current**

- Grant writing proposals obtaining nearly \$60M in funding for capital projects supporting utilities, economic development, and public safety.
- Budgeting, accounting, and financial management of grant funds resulting in clean audit findings for the past 7 years.
- Plan, organize, administer, and manage grant-funded utility projects, building water/wastewater plants, transmission/collection systems, and constructing rail utilities.
- Sustained compliance with relevant state and federal grant regulations, and reporting requirements to establish and sustain compliance.

### **Paradigm Technology Partners – Owner- Cary, NC Oct 2016 – Jan 2018**

- Enterprise IT asset inventory/analysis, offering business insights to drive transparency, alignment, innovation, and rationalization.
- Formulation and analysis of IT capital and operational budgets to quantify value optimization opportunities, strategic objective alignment, and cost savings for gross margin improvement.

### **PeopleFluent - VP Technology Opns, Raleigh, NC. Apr 2007 – Jun 2016**

- Multidisciplinary team leadership of 100 people managing global SaaS/Cloud operations in the U.S., Canada, Europe, and Asia.
- Consolidation of 5 technology companies under private equity ownership enhances performance, scale, and revenue growth.
- Carry out negotiations, support renewal contracts and service-level compliance for more than 200 technology suppliers and partners.

## PREVIOUS EMPLOYMENT

- Director of Infrastructure/Security | Vurv Technology, FL (Technology)
- Vice President | Superior Consultant Company, MI (Healthcare IT)
- Sr. Engineer | Baptist/St. Vincent Health System, FL (Healthcare IT/System)

## MILITARY SERVICE

U.S. Army Field Artillery | Sergeant E-5 | Honorable Discharge | CTSA-NoForn/BI Security Clearance

**SUPPLEMENTAL QUESTIONNAIRE**

**NORTH FLORIDA WATER UTILITY**

**EXECUTIVE DIRECTOR**

**APPLICANTS**

**\*NOTE\* If necessary, applicants may attach additional sheets.**

**Responding to the questionnaire with the answer "see/refer to resume" is not acceptable.**

APPLICANT NAME: SHANNON L. ROBERTS

**1.) Do you possess a degree in public administration, engineering, environmental science, or a closely related field? Please list degree type (e.g., B.S., M.S.) and area (e.g., Environmental Science). If you have more than one degree, please provide that information.**

I have earned a BA Psychology degree, but I do not have a 4-year degree in one of the fields listed above. Despite my degree field, it is noteworthy to point out that I have acquired substantial and materially relevant knowledge and work experience during my nearly 8 years of public administration work in Suwannee County that tightly aligns with the Executive Director role. That work and experience includes the following:

- Managing utility construction projects (WTP, WWTP, transmission/collection systems and rail spur)
- Obtaining nearly \$80M in capital funding (grants) to support economic development, public safety and facility enhancement projects
- Financial management of more than \$35M in utility and public safety projects
- Procurement and contract compliance with state and federally funded projects
- Relationship building at local state and federal levels for strategic funding support

I would respectfully request that the NFWUA Board consider the considerable work experience and accomplishments above and how those items provide an alternative yet demonstrable method to satisfy the formal education requirements for the role.

**2.) Do you possess any related licenses issued by the State of Florida or another State?**

No, I do not possess any related State licensure, but I do have the confidence and determination to obtain any State licensure the Board would require given the proper time and financial support to achieve it.

**3.) How many years of experience do you have in utilities, water, wastewater, utility infrastructure, operations, preventative maintenance or other closely related fields?**

I have nearly 8 years of related utility infrastructure experience since I began working for Suwannee County. Listed below is a high-level summary of the work experience:

- County wide critical infrastructure vulnerability analysis
- Construction of WTP and transmission lines at CR 136/CR137
- Construction of WWTP and collection lines and lift stations at CR 136/I-75 Exit #439
- Extension of water lines, sewer lines and lift stations down CR 137 to I-10 Exit #292
- Collaboration with City of Live Oak extending the sewer main and new lift station at US 129 North / I-10 Exit #283
- Active projects underway in the Suwannee County Industrial Park (CIP) supporting economic development:
  - Construction of 22,000 ft extension of water/fire service mains to eastern service area boundary and under I-10 Exit #275
  - Design of 10,000 ft extension of water/fire service mains to western service area boundary
  - Design of 200K capacity WWTP, collection system, 4 lift stations and a spray field or rapid infiltration basin
  - Pursuit of additional funding for construction of 1M-gallon elevated storage tower
- Other funding efforts include:
  - Expansion of CR 136/I-75 water/sewer lines to the northbound side of I-75 Exit #439 and into the western boundary of Columbia County
  - Expansion of water lines in Suwannee CIP Utility Master Plan for Projects 3 & 4
  - Expansion of utilities to support Suwannee County Regional Shelter that will be built north of US 129 North / I-10 Exit #283

**4.) In 200 words or less, please describe your experience in utilities, water, wastewater, utility infrastructure, operations, preventative maintenance or other closely related fields?**

At a high level, my utility experience was launched out of the necessity to support economic development and the community in a rural county constrained by significant resource limitations to address the challenges ahead. I rolled up my sleeves and initially began to address utility billing and maintenance issues as the highest priorities. As economic interest in the County increased, my focus then shifted to partner with County and Economic Development leaders to create funding strategies supporting the promising vision of growth and to be proactive in efforts to stay ahead of the utility curve. As funding was obtained for various projects, it was important to multi-task as I managed the design and construction of utility projects, procurement and compliance -all the while still actively seeking new funding opportunities.

**5.) How many years of supervisory experience do you have?**

I have 25 years of supervisory and leadership experience.

**6.) In 100 words or less, please describe your supervisory experience.**

My supervisory roles were established in different industries that include Healthcare, IT Consulting and Technology Companies as a Director, Vice President and Chief Operating Officer. My leadership style is team focused and prioritizes relationship building. I have managed teams as small as 5 and as large as 100. My span of control in those positions required me to be responsible for budgets as large as \$100M, enterprise strategy/vision, contract management, employee performance, customer service, quarterly reporting to the Board and operation of 24 X 7 X 365 global internet services in the U.S., Canada, Europe and Asia.

**7.) In 100 words or less, describe your proficiency in use of Microsoft Office products (e.g., Outlook, Word, Excel). How have you used this software in your work?**

I have excellent and advanced skills with nearly all office automation products, computer networks, online computing and business systems (such as finance, accounting, sales and customer

service). I typically utilize office automation software for documentation, budget formulation, report writing, data analysis, presentations and communications.

**8.) Please list any certifications you have related to the functions and duties of this position.**

I do not have any utility-related certifications, but I do have the confidence and determination to obtain any certification the Board would require given the proper time and financial support to achieve it.

**9.) The salary for this position is negotiable. What are your salary and benefits requirements?**

Salary: Since I've been a part of the discussions surrounding this role and salary range, perhaps we can have a conversation to finalize this.

Benefits: Currently, I have a Suwannee County benefits package established and I think it may be easier to keep that package. I would prefer FRS retirement with an executive level contribution rate.

**NORTH FLORIDA WATER UTILITY AUTHORITY  
JOB DESCRIPTION  
EXECUTIVE DIRECTOR**

<b>Skill Requirements: (X= Required for Job)</b>			
X	Typing/computer keyboard	X	Verbal communication
X	Utilize computer software (specified in this description)	X	Written communication
X	Retrieve and compile information	X	Public speaking/group presentations
X	Maintain records/logs	X	Research, analyze and interpret information
X	Verify data and information	X	Investigate, evaluate recommend action
X	Organize and prioritize information/tasks	X	Leadership and supervisory, managing people
X	Operate office equipment	X	Basic mathematical concepts
X	Advanced mathematical concepts (fractions, decimals, ratios, percentages graphs)	X	Abstract mathematical concepts (formulas, equations, statistics)
	Operate heavy equipment (e.g., bobcats, backhoes, dump trucks)	X	Operate motor vehicle

<b>Physical Requirements: (X= Required for Job)</b>			
X	Sitting for extended periods	X	Lifting/carrying up to 20 pounds (various items)
	Standing for extended periods		Lifting/carrying between 20-49 pounds (various items)
X	Viewing computer screen for extended periods		Lifting/carrying over 50 pounds (various items)
	Walking	X	Repetitive Motions
X	Reading		Bending/Stooping
X	Speaking	X	Reaching/Grasping
X	Hearing		Crawling/Crouching
X	Writing		Climbing
X	Seeing 1-5 feet		Physical endurance under variable weather conditions
X	Seeing 5+ feet		Other (list):

<b>Hazards: (X= Required for Job)</b>			
X	Standard office environment		Electrical current
	Toxic or caustic chemicals		Housekeeping and/or cleaning agents
	Outdoor weather conditions and outdoor terrain, wetlands, and/or dense vegetation		Proximity and use of hand-held powered equipment and/or moving mechanical parts
	Other (list):		Other (list):

<b>Employee Acknowledgment:</b> I have reviewed and understand the requirements stated in this Job Description.	
<i>Shannon L. Roberts</i>	2/1/2025
Employee's Signature	Date

# JOSEPH HELFENBERGER

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## Highlights of Qualifications

Strong negotiator with 36 years of experience in local city management developing infrastructure, expanding training, and improving processes to successfully attract new businesses and residents. Pursuing long-term sustainable practices to improve the quality of life for my community.

## Professional Experience

### **Realtor: Watson Realty Corporation, Jacksonville, Florida (February, 2022 – Present)**

- Zillow Premier Agent through contract with Watson Realty Corporation.

### **City Manager: City of Lake City, Florida (Aug., 2018 – June, 2021)**

Lake City is in Northern Florida at the intersection of I-75 and I-10 centered between Jacksonville and Tallahassee. Lake City has 13,000 people and services 40,000 people with municipal sewer, water, and gas.

- Partnered with Columbia County to successfully recruit Werner Enterprises, which built a \$20 million training and maintenance center - adding 80 jobs through a public-private partnership.
- Managing city support for a \$17 million restoration of a two-block historical Blanche Hotel mixed use facility.
- Successfully joined Columbia County's radio system with the City of Lake City resulting in over \$2 million savings and 100% reception improvement.
- Cancelled storm water fee program in favor of a successful grant program coupled with force account work.
- Led effort for Lakeshore Hospital Authority to gift 12 parcels of prime downtown land for new city hall.
- Ensured insurance paid for all but \$10,000 for successful recovery from a malware cyber attack.
- Upgraded staff and equipment for Information Technology Department.

### **Municipal Consultant: Independent Contractor (Aug., 2017 – January, 2022)**

I advised community officials, business leaders, and individuals regarding municipal matters, such as outlining a successful process that led to the sale of deed-restricted property in Thornberry Creek Golf Course.

I worked as interim manager for the City of Archer, FL and the County of Glades, FL, where I made significant improvements in finance and personnel to get these communities set up for future success. While in Archer, I used prison inmates to do over \$100,000 of maintenance to a community center and assist with street and storm water projects, sponsored a clean-up day, advanced the planning for a municipal sewer system, managed waste disposal, and created policies to better coordinate service delivery. While in the County of Glades, I eliminated a budget deficit with no tax increase, reorganized the Public Works Department, led a canal-widening economic development project, and pursued a legislative solution regarding a potential federal buyout of county lands.

### **City Manager: City of St. Cloud, Florida (Nov., 2015 – July, 2017)**

St. Cloud is located in Central Florida and has a population of 62,000 people. The total budget is \$137 million. There are 500 employees. (The budget increased over 52% after I left)

- Secured agreement for construction of 15-story mixed-use building in downtown along with restoration of two historic hotels.
- Worked with lobbyist to secure \$9.5 million to complete Florida Turnpike Interchange
- Eliminated \$5 million deficit in City Budget with no ad valorem tax increase
- Shortened development permitting process from six months to two months
- Rebuilt Planning and Building Departments to handle 100% increase in their workloads
- Secured ½ step improvement in City's bond rating

- Obtained FAA approval for seaplane airport.
- Planned for reconstruction of downtown in four phases with historic brick, pedestrian mall, Centennial Plaza, decorative street lighting, and extensive landscaping.
- Automated building permitting process.
- Moved to self-insurance for workers' compensation and health insurance saving 20%
- Added the New Years' Eve Annual Celebration, drew 5,000 first year
- Held monthly press conferences to increase transparency and City image.

**City Administrator: City of Ottumwa, Iowa (Feb., 2008 – Oct., 2015)**

Ottumwa is located in Southeast Iowa and has a population of 25,000 people with 150,000 is a Commercial hub for 150,000 people. The total budget is about \$80 million with over 230 employees.

- One of the longest time frames granted in U.S. history, I bargained a 25-year sewer separation mandate agreement with the Iowa DNR for \$160 million. Managed projects for sewer, storm, bridge, and street, costing \$77 million, with 76% grant funding
- Directed major flooding crisis in June of 2008 with the outcome of zero residential flooding. Collaborated with emergency government director to secure National Guard units and raise community support, including voluntary labor and \$30,000 of donations
- As a result of the flooding crisis, I led the creation of a plan for major reconstruction of city streets, bridges, levees, sanitary and storm sewer systems.
- Led staff and consultants to pursue grants for sewer and flood projects, resulting in over \$47 million grant funding, dedicated for reconstruction.
- Strong, persistent negotiations, resulting in major retail establishments, such as Kohl's, Culvers and Hampton Inn
- Managed \$59 to \$80 million in annual expenditures and implemented cost-savings initiatives, such as a contract for city golf course management, saving an average of \$100,000 annually
- Lead the development of new management to Civic Center, saving city over \$150,000 annually
- Negotiated new agreements with Dr. Pepper/Snapple for future company development and retention of 220 jobs

**Village Administrator: Hobart, Wisconsin (July, 1997-Feb., 2008) pop. 8,599**

Hobart is located in Northeast Wisconsin on the Western border of Green Bay and entirely within the Oneida Tribe of Indians of Wisconsin Reservation. Premium housing with 27-hole and 18-hole golf courses.

- Created the SE Industrial Park and planned the 350-acre Centennial Centre Business Park, financed by TIF
- Negotiated with state legislators, former Governor Doyle, Oneida Tribe and the surrounding municipalities, to change Hobart from a town to its current village status, Standard & Poors AA+ bond rating, one of the highest in the state
- Created the first-ever service payment agreement with the Oneidas for tribal tax-exempt properties
- Created the Hobart Police Department and the Hobart Municipal Court, negotiating shared services with Lawrence, WI
- Rescued a Hobart Class A trout stream by mandating Green Bay airport to pipe harmful ethylene glycol to the Hobart sewage treatment system. Sensitive Oneida tribal negotiations performed on the project by fostering mutual trust.

**Village Administrator: Pulaski, Wisconsin (Jan., 1990 to July, 1997) pop. 3,548**

Pulaski is located in Northeast Wisconsin 15 miles northwest of Green Bay. The population is about 3,600 people. The largest event is the Annual Polka Days Festival, which draws from across the country.

- Sold city-owned residential and industrial lots.
- Reconstructed water, sanitary sewer, storm sewer, and streets with grant funding for most projects.
- Led the DNR mandated construction of \$8 million sewer pipeline
- Lobbied state representatives and Governor, acquiring 90% grant funding for the pipeline with special state legislation

- Created the Pulaski Industrial Park and three upper scale city-owned residential subdivisions, which contributed to doubling the property tax base from 1990 to 1997.
- Planned and coordinated the development for the newly created \$25 million high school, which services a 40 square mile radius.

**Village Coordinator: North Fond du Lac, Wisconsin (Nov., 1988 – Dec., 1989)**

Located in East Central Wisconsin, and has a population of about 5,000. A bedroom community for the City of Fond du Lac. Regional headquarters for Wisconsin Central Railroad.

- Managed CNN sited flooding by creating major storm sewer upgrades
- Zoning restrictions created to develop higher housing standards
- Drinking water radium levels reduced to meet safety standards

**Village Administrator: Necedah, Wisconsin (Jan., 1985 – Oct., 1988)**

- Management of HUD Housing rehabilitation projects, which increased the value of lower income homes
- Led the successful effort to create dam reconstruction grant with WI DNR assistance, which funded Necedah dam
- Funded construction of paved airport runway in place of grass runway using no property tax dollars. Secured 90% of federal funding and 10% matching funds from local private businesses
- Created the Necedah Industrial Park with railroad access. Coordinated downtown revitalization

**Education**

**M.A. in Public Policy and Administration:** University of Wisconsin-Madison. 1984.

**B.S. in Political Science:** University of Wisconsin-Stevens Point. 1980.

**Credentialed City Manager,** ICMA, 2018.

**Affiliations:** ICMA, Florida City/County Management Association, Jacksonville Chamber of Commerce, Three Rivers Council to the Jacksonville Chamber, Holy Redeemer Knights of Columbus, National Association of Realtors, Florida Association of Realtors, Northeast Florida Area Realtors Association.

**Certifications/Licenses:**

Real Estate Sales Associate: Florida License 3526273, active through September, 2025.

Ninja Selling Certification, April 22, 2022.



Joseph A. Helfenberger

1. **Do you possess a degree in Public Administration, engineering, environmental science, or a closely related field? Please list degree type (e.g., B.S., M.S.) and area (e.g., Environmental Science). If you have more than one degree, please provide that information.**
  - o I possess the following degrees:
    - **M.A. in Public Policy and Administration** from the University of Wisconsin-Madison, 1984.
    - **B.S. in Political Science** from the University of Wisconsin-Stevens Point, 1980.
2. **Do you possess any related licenses issued by the State of Florida or another State? Please provide the type of license and license number.**
  - o Yes, I hold the following license:
    - **Real Estate Sales Associate:** Florida License 3526273, active through September 2025.
3. **How many years of experience do you have in utilities, water, wastewater, utility infrastructure, operations, preventative maintenance, or other closely related fields?**
  - o I have had **extensive experience** in municipal management, which includes overseeing water, wastewater, sewer, and other utility infrastructure projects throughout my career. Relevant experience can be seen in my roles managing major infrastructure projects, particularly in sewer and stormwater systems.
  - o **Years of experience:** I have over 36 years of municipal management, much of which involved overseeing utility infrastructure, water, wastewater, and related operations.
4. **In 200 words or less, please describe your experience in utilities, water, wastewater, utility infrastructure, operations, preventative maintenance, or other closely related fields?**
  - o Throughout my career, I successfully oversaw and managed numerous water, wastewater, and utility infrastructure projects. While serving as City Administrator in Ottumwa, IA, I negotiated a 25-year sewer separation mandate agreement with the Iowa Department of Natural Resources (DNR), overseeing \$160 million in sewer and stormwater projects. I also led efforts to secure over \$47 million in grants for sewer and flood reconstruction in Ottumwa. I managed extensive utility infrastructure projects such as street, sewer, and bridge reconstruction, and spearheaded major stormwater and sewer upgrades. In my role as City Manager in Lake City, FL, I worked with Columbia County to improve

Joseph A. Helfenberger

the city's sewer, water, and gas services, ensuring effective utility delivery to over 40,000 residents. Additionally, I have experience implementing preventative maintenance programs and improving infrastructure sustainability. My efforts consistently focus on enhancing the efficiency and reliability of municipal utility systems, ensuring that they meet both current and future community needs.

**5. How many years of supervisory experience do you have?**

- I have over **36 years** of supervisory experience in various leadership roles, including City Manager, Village Administrator, County Manager, and Municipal Consultant.

**6. In 100 words or less, please describe your supervisory experience.**

- I have extensive supervisory experience managing large teams in municipal government. As City Manager in multiple cities, I oversaw teams ranging from 100 to 500+ employees, managing budgets up to \$137 million. I have led departments in city administration, public works, planning, and more. My leadership focused on improving operational efficiency, fostering transparency, and implementing cost-saving initiatives. I also mentored staff, ensuring professional development and successful project completion. I consistently worked to align teams with strategic goals, facilitating collaboration to address the needs of the community.

**7. In 100 words or less, describe your proficiency in the use of Microsoft Office products (e.g., Outlook, Word, Excel). How have you used this software in your work?**

- I am highly proficient in Microsoft Office products. I have used **Outlook** for email and scheduling, **Word** for drafting reports, memos, and policies, and **Excel** for managing budgets, tracking project data, and analyzing financial information. My experience includes creating detailed financial reports, tracking grant funding, and compiling data for strategic planning purposes. Microsoft Office tools have been essential for project management, ensuring efficient communication, budgeting, and reporting.

**8. Please list any certifications you have related to the functions and duties of this position.**

- I hold the following certifications:
  - **Real Estate Sales Associate:** Florida License 3526273 (active through September 2025).
  - **Ninja Selling Certification** (April 2022).

Joseph A. Helfenberger

**9. The salary for this position is negotiable. What are your salary and benefits requirements?**

Based on my 36 years of experience in municipal management, including roles as City Manager, Village Administrator, County Manager, and Municipal Consultant, I would expect a salary that reflects the seniority and scope of responsibility associated with this position. Given my expertise in overseeing large-scale infrastructure projects, managing multimillion-dollar budgets, and leading diverse teams, I am seeking a salary in the range similar to my highest earnings which I can discuss in person. This amount would align with my experience managing large municipalities and executing complex initiatives. I am open to further discussion regarding salary and benefits, and I look forward to aligning expectations during the interview process.