



**NOTICE OF A REGULAR MEETING TO BE HELD BY THE
McALLEN PUBLIC UTILITY BOARD OF TRUSTEES**

DATE: Tuesday, April 25, 2023

TIME: 4:00 P.M.

PLACE: McAllen City Hall
Commission Chambers – 3rd Floor
1300 Houston Avenue
McAllen, Texas 78501

SUBJECT MATTER:

See Subsequent Agenda.

CERTIFICATION

I, the Undersigned authority, do hereby certify that the attached agenda of meeting of the McAllen Public Utility Board of Trustees is a true and correct copy and that I posted a true and correct copy of said notice on the bulletin board in the Municipal Building, a place convenient and readily accessible to the general public at all times, and said Notice was posted on the 21st day of April, 2023 at 3:00 P.M. and will remain so posted continuously for at least 72 hours preceding the scheduled time of said meeting in accordance with Chapter 551 of the Texas Government Code.



Juan J. Rodriguez
Interim Utility Board Secretary/
Assistant General Manager



**BOARD OF TRUSTEES MEETING
TUESDAY, APRIL 25, 2023 – 4:00 PM
MCALLEN CITY HALL - COMMISSION CHAMBERS
1300 HOUSTON AVE, MCALLEN TX, 78501**

AGENDA

AT ANY TIME DURING THE COURSE OF THIS MEETING, THE MCALLEN PUBLIC UTILITY BOARD MAY RETIRE TO EXECUTIVE SESSION UNDER TEXAS GOVERNMENT CODE 551.071(2) TO CONFER WITH ITS LEGAL COUNSEL ON ANY SUBJECT MATTER ON THIS AGENDA IN WHICH THE DUTY OF THE ATTORNEY TO THE MCALLEN PUBLIC UTILITY BOARD UNDER THE TEXAS DISCIPLINARY RULES OF PROFESSIONAL CONDUCT OF THE STATE BAR OF TEXAS CLEARLY CONFLICTS WITH CHAPTER 551 OF THE TEXAS GOVERNMENT CODE. FURTHER, AT ANY TIME DURING THE COURSE OF THIS MEETING, THE MCALLEN PUBLIC UTILITY BOARD MAY RETIRE TO EXECUTIVE SESSION TO DELIBERATE ON ANY SUBJECT SLATED FOR DISCUSSION AT THIS MEETING, AS MAY BE PERMITTED UNDER ONE OR MORE OF THE EXCEPTIONS TO THE OPEN MEETINGS ACT SET FORTH IN TITLE 5, SUBTITLE A, CHAPTER 551, SUBCHAPTER D OF THE TEXAS GOVERNMENT CODE.

CALL TO ORDER

PLEDGE

INVOCATION

PRESENTATION OF EMPLOYEE OF THE MONTH - JUAN VALLEJO

PRESENTATION OF WATER MARK AWARD - HONORABLE MENTION FOR MPU'S EDUCATION CAMPS PRESENTED AT THE 2023 TEXAS WATER CONFERENCE IN HOUSTON

1. MINUTES:

- a) Approval of Special Meeting Minutes held April 6, 2023.

2. CONSENT AGENDA:

- a) Consider Adopting an Order of the Board of Trustees to Revise and Update MPU's Water Conservation and Drought Contingency Plan.
- b) Approval of the Fire Fighter Training Facility Subdivision.
- c) Approval of Mikada Subdivision.
- d) Approval of Silver Oak Subdivision.
- e) Approval of Vargas Patrimony Subdivision.

3. BIDS AND CONTRACTS:

- a) Award of Contract for City of McAllen Employee Dental Plan
- b) Award of Contract for City of McAllen Employee Vision Plan
- c) Award of Contract for City of McAllen Employee Basic Life, Voluntary Life and Disability Plans

- d) Consideration and Authorization to Declare MPU Property as Surplus
- e) Consider Professional Services Amendment #2 for Reuse Master Plan Update Project.

4. FUTURE AGENDA ITEMS

5. EXECUTIVE SESSION, CHAPTER 551, TEXAS GOVERNMENT CODE, SECTION 551.071 CONSULTATION WITH ATTORNEY, SECTION 551.072 LAND TRANSACTION, SECTION 551.074 PERSONNEL MATTERS; SECTION 551.087 ECONOMIC DEVELOPMENT NEGOTIATIONS

- a) Consultation with City Attorney regarding pending litigation before the PUC (T.G.C. 551.071)
- b) Discussion and possible lease, sale or purchase of Real Property, Tract 1 (Section 551.072, T.G.C).

ADJOURNMENT

IF ANY ACCOMMODATION FOR A DISABILITY IS REQUIRED (OR INTERPRETERS FOR THE DEAF), NOTIFY UTILITY ADMINISTRATION (681-1630) FORTY-EIGHT (48) HOURS PRIOR TO THE MEETING DATE. WITH REGARD TO ANY ITEM, THE MCALLEN PUBLIC UTILITY BOARD OF TRUSTEES MAY TAKE VARIOUS ACTIONS; INCLUDING BUT NOT LIMITED TO RESCHEDULING AN ITEM IN ITS ENTIRETY FOR A FUTURE DATE OF TIME. THE MCALLEN PUBLIC UTILITY BOARD MAY ELECT TO GO INTO EXECUTIVE SESSION ON ANY ITEM WHETHER OR NOT SUCH ITEM IS POSTED AS AN EXECUTIVE SESSION ITEM AT ANY TIME DURING THE MEETING WHEN AUTHORIZED BY THE PROVISIONS OF THE OPEN MEETINGS ACT.

THE NEXT REGULARLY SCHEDULED BOARD MEETING WILL BE HELD ON MAY 9, 2023.



AGENDA ITEM

1.a.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/19/2023

MEETING DATE

4/25/2023

1. Agenda Item: Approval of Special Meeting Minutes held April 6, 2023.

2. Party Making Request:

3. Nature of Request:

4. Budgeted:

Bid Amount: _____
Under Budget: _____

Budgeted Amount: _____
Over Budget: _____
Amount Remaining: _____

5. Reimbursement:

6. Routing:

Savannah Arredondo

Created/Initiated - 4/19/2023

7. Staff's Recommendation:

8. City Attorney: Approve. IJT

9. MPU General Manager: Approved - MAV

10. Director of Finance for Utilities: Approved - MDC

**STATE OF TEXAS
COUNTY OF HIDALGO
CITY OF MCALLEN**

The McAllen Public Utility Board (MPUB) convened in a Special Meeting on **Thursday, April 6, 2022**, at 2:00 pm at in the City Commission Chambers at City Hall with the following present:

Absent:	Charles Amos Ernest Williams Javier Villalobos Albert Cardenas Ricardo Godinez	Chairman Vice-Chairman Ex-Officio Member/Mayor Trustee Trustee
Staff:	Marco A. Vega, P.E. Isaac Tawil J.J. Rodriguez Savannah Arredondo Melba Carvajal Pablo Rodriguez Terri Uvalle Carlos Gonzalez, P.E. Edward Gonzalez Erika Gomez, EIT Jessica Salinas Marco Ramirez, P.E. Rafael Balderas, EIT Yesenia Tijerina Janet Landeros Cindy Reyes Alfredo Martinez Yajaira Zamarripa Rosalinda Ramos Ester Balboa Alonzo Lopez Mayra Valdez Kimberly Alonzo Emmanuel Villa Edgar Ituarte Marino Ibarra Lisa Rangel Maria Rivera Alejandra Garza Ismael Rodriguez, Jr. Oscar Hinojosa	General Manager City Attorney Assistant General Manager Assistant to the Utility Board Secretary Director of Finance for Utilities Assistant Director for Customer Relations Assistant Director-Utility Billing Utility Engineer Director of Water Systems Assistant Utility Engineer Water Education & Comm Coord Utility Engineer Assistant Utility Engineer Senior Administrative Clerk Grants & Contracts Coordinator Customer Relations Admin. Assistant Customer Relations Cashier Utility Billing Clerk Utility Billing Clerk Utility Billing Manager Utility Billing Clerk Customer Service Manager Customer Relations Cashier Customer Service Specialist Utility Billing Working Supervisor Utility Billing Clerk Utility Billing Admin. Assistant Customer Relations Working Sup. Customer Relations Cashier Customer Service Assistant Manager Assistant Director WW Utilities

CALL TO ORDER:

Chairman Amos called the meeting to order at 2:07 p.m.

1. MINUTES:

Mayor Villalobos moved to approve the minutes for the Regular Meeting held on February 28, 2023 and the Board Retreat held March 2, 2023. Vice Chairman Williams seconded the motion. The motion carried unanimously by those present.

2. CONSENT AGENDA

Mayor Villalobos moved to approve items 2a through 2c. Vice-Chairman Williams seconded the motion. The motion carried unanimously by those present.

- a) Approval of Fire Station No. 8 Subdivision.
- b) Approval of Sunset Valley Subdivision
- c) Approval of Suarez Subdivision

3. MANAGER'S REPORT:

- a) Consideration of the acceptance of a Certification of Unopposed Candidates for certain races on the May 6, 2023 General City Election and Issuance of an Order of Cancellation for same races. Presentación y aceptación de una Certificación de Candidatos Únicos para ciertos puestos o cargos, para la Elección General de la Ciudad del 6 de Mayo de 2023 y aprobación de una Orden de Cancelación para los mismos puestos.

Isaac Tawil, City Attorney, stated that no one had filed an application to run for the Public Utility Board by the deadline for the May ballot. Since there were no candidates, the law allows those elections to be cancelled and the incumbents will be declared the winners.

Mayor Villalobos moved to approve item the Consideration of the acceptance of a Certification of Unopposed Candidates. Vice-Chairman Williams seconded the motion. The motion carried unanimously by those present.

- b) Review of Quarterly Investment Report for Quarter Ending December 31, 2022.

Mayor Villalobos moved to approve the Review of Quarterly Investment Report for Quarter Ending December 31, 2022. Vice-Chairman Williams seconded the motion. The motion carried unanimously by those present.

4. FUTURE AGENDA ITEMS

5. EXECUTIVE SESSION, CHAPTER 551, TEXAS GOVERNMENT CODE, SECTION 551.071 CONSULTATION WITH ATTORNEY, SECTION 551.072 LAND TRANSACTION, SECTION 551.074 PERSONNEL MATTERS; SECTION 551.087 ECONOMIC DEVELOPMENT NEGOTIATIONS

Chairman Amos recessed the meeting at 2:18 p.m. to go into Executive Session. Chairman Amos reconvened the meeting at 2:42 p.m.

- a) Consultation with City Attorney regarding legal issues with the development process. (Section 551.071, T.G.C)
- b) Consultation with City Attorney regarding pending litigation before the PUC (T.G.C 551.071).
- c) Consultation with City Attorney regarding legal issues related to board appointments (Section 551.071).

No action was taken

ADJOURNMENT

There being no other business to come before the Board, the meeting was unanimously adjourned at 2:45 p.m.

Charles Amos, Chairman

Attest:

Juan J. Rodriguez
Interim Utility Board Secretary/
Assistant General Manager



AGENDA ITEM

2.a.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/19/2023

MEETING DATE

4/25/2023

1. **Agenda Item:** Consider Adopting an Order of the Board of Trustees to Revise and Update MPU's Water Conservation and Drought Contingency Plan.
2. **Party Making Request:**
Janet Landeros
3. **Nature of Request:** State ordinance requires retail public water suppliers to update their Water Conservation and Drought Contingency Plan every five years. The plan was last updated and adopted by the City Commission and MPU Board in May 2018. -
4. **Budgeted:**

Bid Amount:		Budgeted Amount:	
Under Budget:		Over Budget:	
		Amount Remaining:	
5. **Reimbursement:**
6. **Routing:**
Janet Landeros Created/Initiated - 4/19/2023
7. **Staff's Recommendation:** Consider Adopting an Order of the Board of Trustees to Revise and Update MPU's Water Conservation and Drought Contingency Plan
8. **City Attorney:** Approve. IJT
9. **MPU General Manager:** Approved - MAV
10. **Director of Finance for Utilities:** Approved - MDC



Memo

TO: Marco A. Vega, P.E., General Manager

CC: McAllen Public Utility Board of Trustees

THRU: Edward Gonzalez, Water Systems Director

FROM: Janet Matthews Landeros, Grants and Contracts Coordinator

DATE: April 18, 2023

SUBJECT: **Updated Water Conservation and Drought Contingency Plan**

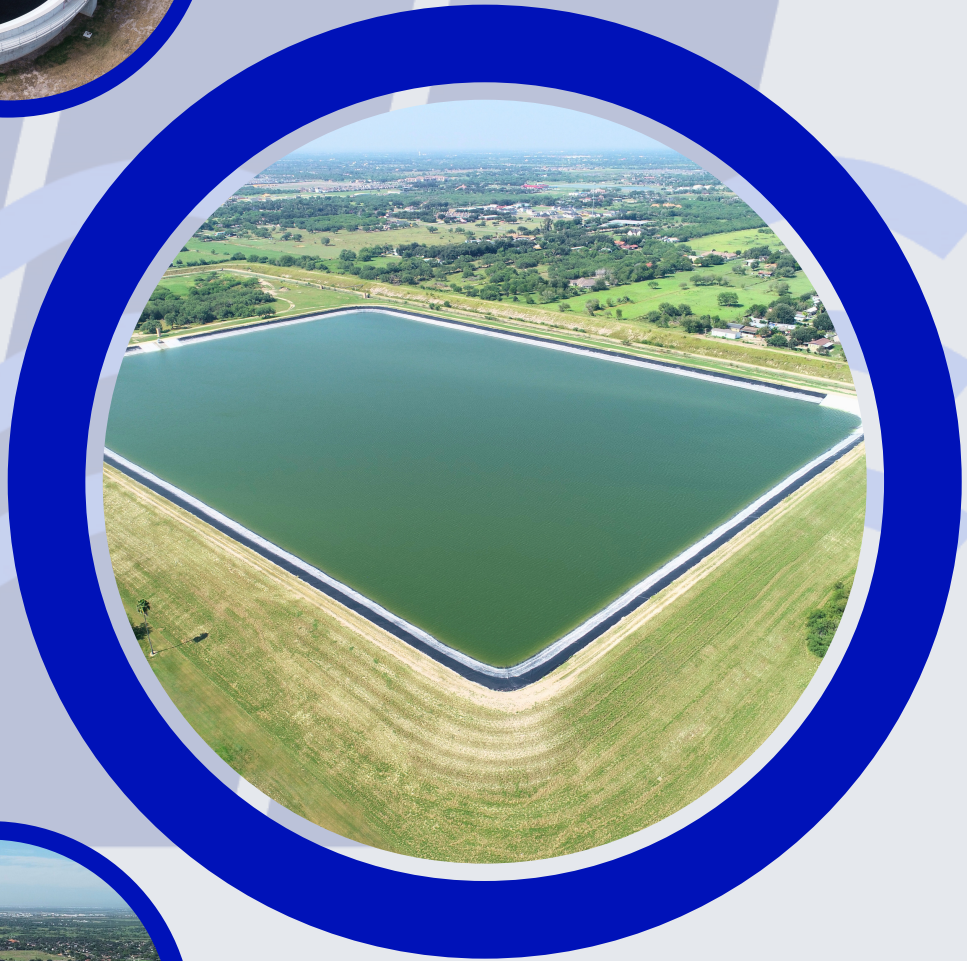
The purpose of the City of McAllen's Water Conservation and Drought Contingency Plan (Plan) is to improve water use efficiency and water shortage planning. The Plan outlines strategies for monitoring the progression of a drought and responding to potential water supply shortages to minimize its adverse impacts. The Plan also presents practices, techniques, and technologies that may be used to conserve the available water supply, improve water efficiencies, and prevent or reduce the loss of water.

The Texas Commission on Environmental Quality (TCEQ) requires all retail public water suppliers to update and readopt their Water Conservation and Drought Contingency Plan every five (5) years, no later than May 1st. The Texas Water Development Board (TWDB) also requires an adopted Water Conservation and Drought Contingency Plan to qualify for financial assistance. The City of McAllen's Plan was last updated and approved by the McAllen Public Utility Board of Trustees on May 30, 2018.

Staff requests that the McAllen Public Utility Board of Trustees Consider Adopting an Order of the Board of Trustees to Revise and Update MPU's Water Conservation and Drought Contingency Plan. Staff will be available for comments or questions.

CITY OF MCALLEN

WATER CONSERVATION & DROUGHT CONTINGENCY PLAN



May 2023

McAllen Public Utility

**CITY OF MCALLEN
MCALLEN PUBLIC UTILITY**

WATER CONSERVATION AND DROUGHT CONTINGENCY PLAN

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Section I: Sec. 106-116 DECLARATION OF POLICY, PURPOSE, AND INTENT

In order to conserve the available water supply and protect the integrity of water supply facilities, with particular regard for domestic water use, sanitation, and fire protection, and to protect and preserve public health, welfare, and safety and minimize the adverse impacts of water supply shortage or other water supply emergency conditions, the City of McAllen, Texas and McAllen Public Utility (MPU) hereby adopts the following regulations and restrictions on the delivery and consumption of water, under this Water Conservation and Drought Contingency Plan (Plan).

The purpose of this Plan is to establish a water conservation and drought contingency strategy for the City of McAllen in accordance with Texas Administrative Code Title 30, Chapter 288. The basic goal of this Plan is to ensure an uninterrupted supply of water in an amount sufficient to satisfy essential human needs. The Plan develops a conservation strategy for reducing the volume of water withdrawn from a water supply source, for reducing the loss or waste of water, for increasing the recycling and reuse of water, and for preventing the pollution of water. Overall, this Plan is a strategy for temporary supply management and demand management responses to temporary and potentially recurring water supply shortages and other water supply emergencies.

Water uses regulated or prohibited under this Plan are considered non-essential and continuation of such uses during times of water shortage or other emergency water supply condition are deemed to constitute a waste of water which subjects the offender(s) to penalties as defined in Section X of this Plan.

Section II: Sec. 106-117 UTILITY PROFILE

McAllen, Hidalgo County, Texas is in an area known as the Lower Rio Grande Valley of Texas, which is located at the southern tip of the state. The city limits extend south to the Rio Grande, across from the Mexican City of Reynosa. McAllen is about 70 miles west of the Gulf of Mexico and approximately ten miles from the Mexican border.

MPU provides water and wastewater services within a 48.7 square mile area, which includes the City of McAllen and a portion of customers living in various neighborhoods of adjacent extraterritorial jurisdictions of the cities of Alton, Edinburg, Mission, La Joya and Pharr. The service area has an estimated population as of March 2023 of 183,792. There was an approximate 2.2% annual growth in population over the past decade. The population is projected to continue to grow at least another 10% or more by 2030.

McAllen faces water reliability challenges due to being located a semiarid climate featuring long, very hot and humid summers, and brief, warm winters. There are two distinct seasons: a wet season from May to October and a dry season from November to April. Temperatures consistently rise above 100 °F (38 °C) from June through August, with exceptionally high humidity. Drought conditions are part of the natural weather patterns as summer months do not provide much precipitation.

A. WATER SYSTEM

1. Water Supply

Raw Water Supply: The Rio Grande River is the sole source of water for the City of McAllen service area and MPU has water contracts with the following districts:

WATER DELIVERY DISTRICT	ACRE FT/YEAR
Hidalgo County Irrigation District Number 1	4,000 acre ft/year
Hidalgo County Irrigation District Number 2	8,111 acre ft/year
Hidalgo County Water Improvement District Number 3	14,530 acre ft/year
United Irrigation District	11,250 acre ft/year
Brownsville Irrigation District	2,000 acre ft/year
City of McAllen Water Rights	645 acre ft/year
Total	40,886 acre ft/ year

2. Water Treatment System

MPU operates two Water Treatment Plants

Southwest Water Treatment Plant (2501 W Expressway 83): 50.5 MGD (rerated 2023)

Northwest Water Treatment Plant (8313 North Bentsen Rd): 11.2 MGD (rerated 2011)

Total System Treatment Capacity: 61.7 MGD

Note: The Southwest Water Treatment Plant includes a groundwater well rated at 1.5 MGD

3. Water Pumping and Storage

Current annual pumpage for 2022 was 8.45 billion gallons of water. MPU has various pumps located at the Southwest Water Treatment Plant to pump raw water from the raw water reservoir into the plant facilities for treatment. The plant also has high service pumps to pump water from the ground storage tanks into the distribution system. MPU relies on elevated storage and high service pumps for pressure maintenance. Raw Pump Total Capacity 100.9 MGD, High Service Total Capacity 120.7 MGD

MPU has seven water towers with a total of 6.75 million gallons of elevated storage, and 11.9 million gallons of ground storage. All ground storage and elevated towers are monitored by a SCADA system. The system allows MPU to monitor flow data and record historical trends in the treatment and distribution system.

As of 2023, MPU has an estimated 747.0 miles of water lines, of which approximately sixteen percent (16%) are 12 inches in diameter or larger. The MPU system has 60,032 water valves and 5,381 active fire hydrants.

Average annual pumpage (3-year average 2020-2022): 8,742.58 MG/year

Maximum daily treatment capacity: 61.7 MGD

Average daily pumpage (3-year average): 23.95 MGD

4. Water Use

MPU supplies water for residential, commercial, industrial, and public use. The total per capita use for the City in 2021 is estimated at 157 gallons per capita per day (gpcd). This is an average taken by dividing the total water treated by the population served. The residential gallons per capita per day are estimated at 94 gpcd. Residential gpcd is calculated by dividing total single-family and multi-family residential water sales by the population served.

The industrial users accounted for 3.0% of total water use. The largest volume industrial user for 2022 was Coca-Cola Company, which purchased approximately 67.22 MG of water, or 0.8 percent (0.8%) of total water usage.

Large sized meters, or those 1.5 inches and larger in size, make up only 3.3% of the meters used but use 33.3% of the water. Conversely, small sized meters, or those 1-inch and below, make up 96.7% of all meters but account for less than 66.7% of metered sales.

5. Unaccounted for Water

The unaccounted-for water is due to breaks, leaks, meter under-registration, processing, flushing mains, system loss, and un-metered fire hydrants. The amount of unaccounted for water is determined by the difference between production and sales of water. The average amount of unaccounted-for water loss for the past three years was 12.41%. The unaccounted-for loss of water for 2022 was 9.45%.

6. Water Master Plan

An updated Water Master Plan was completed by Freese and Nichols, Inc. in January 2023 to evaluate the integrity of the existing water systems and to recommend a phased capital improvements plan to serve growth through 2042. The recommended improvements will serve as a basis for the design, construction, and financing of facilities required to meet MPU's water service needs due to projected population growth.

Generally, the Water Master Plan will include projects that will help to improve water conveyance and water storage. These projects will not only address growth but mitigate water loss. To diversify the Utilities' water portfolio and to lessen the dependency on surface water, consideration for alternate water sources for future treatment expansions are considered.

B. WASTEWATER SYSTEM

1. Wastewater Treatment System

MPU operates two Wastewater Treatment Plants

South Wastewater Treatment Plant (4100 Idela Ave)

This plant is a 10.0 MGD Biological Nutrient Removal Plant with a design flow with 31.0 MGD peak flow capabilities. It is currently sixty one percent (61%) hydraulically loaded with effluent limitation of 10 mg/l of carbonaceous biochemical oxygen demand; 15 mg/l of total suspended solids; 2 mg/l of ammonia nitrogen and E. coli, CFU or MPN/100 ml 126.

North Wastewater Treatment Plant (2100 West Sprague)

This plant is a 15.0 MGD design flow with 28.125 MGD peak flow capability. The permit limitations include 10 mg/l of biochemical oxygen demand, and 15 mg/l of total suspended solids, 3 mg/l of ammonia nitrogen and 126 MPN/100 ml E. coli.

Both Wastewater Treatment Plants are based upon extended aeration activated sludge system, with secondary effluent limitations. Treated effluent is discharged into floodways and eventually into the Arroyo Colorado and Laguna Madre Estuary.

The total treated wastewater volume for 2022 was 4516.368 million gallons. The average daily between both Wastewater Treatment Plants is 12.37 MGD.

The wastewater infrastructure consists of 664 miles of wastewater lines, 56 lift station within the City of McAllen and 10 lift stations within the City of Alton.

2. Wastewater Production

Average annual amount treated (4-year average 2019-2022): 4,775.3 MG/yr

Maximum daily treatment capacity: 21.25 MGD

Average daily treated: 13.1 MGD

3. Wastewater Master Plan

An updated Wastewater Master Plan was completed by Freese and Nichols, Inc. in January 2023 to evaluate the integrity of the existing wastewater systems and to recommend a phased capital improvements plan to serve growth through 2042. The recommended improvements will serve as a basis for the design, construction, and financing of facilities required to meet MPU's wastewater service needs due to projected population growth.

The Wastewater Master Plan provides recommendations for infrastructure improvements that will satisfy growth and improve wastewater collections and conveyance. The efficiency of wastewater collection and conveyance to the wastewater treatment facilities is crucial to assure that the availability of Reclaimed Water is maximized.

C. RECLAIMED WATER SYSTEM

1. Reclaimed Water

The City of McAllen currently produces reclaimed water from both Wastewater Treatment facilities. The South Wastewater Treatment Plant provides Type II Reclaimed water to the City owned Champion Lakes Golf Course, which is located approximately one mile away from the treatment facility. The North Wastewater Treatment Plant produces both Type I and Type II Reclaimed Water for irrigation and industrial use. The Tres Lagos Master Planned Community and City owned Youth Baseball Complex facility are served with Type I reclaimed water for irrigation use. Additionally, the City also has contracts to serve reclaimed water for industrial use to electric power generation facilities Calpine and Magic Valley.

Plans for continued expansion and growth of the reclaimed water system are in place to maximize the usage and storage of reclaimed water. Currently, reclaimed water is stored at repurposed wastewater clarifiers within the treatment facilities. Storage facilities at point of delivery to the Tres Lagos Community will soon be constructed. Furthermore, MPU is constantly evaluating potential reclaimed water users that could be served from the South Wastewater Treatment Plant. The South Wastewater Treatment Plant master layout includes a filtration system to produce Type I reclaimed water in the future.

2. Reclaimed Water Master Plan

An updated Reclaimed Water Master Plan is projected to be completed by Plummer Consultants in the Summer of 2023. The Master Plan will include projected reclaimed water needs and infrastructure improvements to meet such requirements. Evaluation and analysis of reclaimed water treatment process, distribution, and storage needs will also be included to continue to extend and grow the existing reclaimed water system.

Section III: Sec. 106-118 WATER CONSERVATION GOALS

Based on the data found in the utility profile and on careful evaluation of the City Of McAllen's

water consumption and practices, MPU has set the following goals to be achieved through the adoption of this water conservation plan:

- A. MPU will strive to attain a two percent (2%) reduction goal and to maintain the unaccounted-for water loss at 8 - 10 percent by 2028.
- B. To implement long term cost-effective recovery measures for major causes of unaccounted-for water related to metering. We have implemented a meter change out policy that requires all meters to be changed out after 10 years or 1.0 MG of total flow and an aggressive meter testing program to identify and deal with problem meters. A 2017 water audit reflected that our program is working.
- C. To increase both public and employee awareness regarding water conservation and water related issues. This will especially be encouraged during summer months when water consumption increases significantly.
- D. To continue to pursue alternate water sources.
- E. To promote xeriscape landscape use like low-water using shrubs and plants, patios, rocks, decks, and walkways in order to reduce the amount of high water consuming landscape area. Businesses as well as residential users will be encouraged to participate.
- F. To promote more efficient irrigation techniques for agriculture, industry, and private use through rebates, retrofit, and education.
- G. A full time Water Education and Communications Coordinator is on staff. The Coordinator will be developing conservation programs and educational activities to both the public and to school age children to enhance the understanding of water utility systems, as well as, promote water conservation and prevention of pollution of water resources.
- H. Wholesale customers will be required to implement and adhere to a water conservation and drought contingency plan. Currently, no wholesale contracts exist.

Section IV: Sec. 106-119 WATER CONSERVATION STRATEGIES

A. Conservation Related Projects

In an effort to advance water conservation goals, McAllen has prioritized CIP Projects that incorporate a measurable direct conservation/drought contingency benefit. These projects include the following: delivery efficiency projects; water metering upgrade projects; projects that increase storage of either raw water and potable water supplies; and projects that improve system redundancy such as alternate source projects. A more detailed description of these projects is provided below:

1. Infrastructure Improvement Projects:

- a. **Raw Water Conveyance System Improvements:** Raw water is delivered from a third party, normally an Irrigation District, to a McAllen owned reservoir. The water is then delivered from the reservoir to our treatment facilities for processing. Portions of the raw water conveyance system is comprised of concrete mortar joint pipe. This pipe is considered a rigid pipe and due to its size, any leak can account for significant water losses. Thus, projects that improve efficiency and reliability of this delivery system is a targeted goal.

- b. Water Storage System Improvements:** These include projects that increase/improve water storage capacity for either raw water supplies and/or treated water. May also include projects that mitigate water losses such as reservoir water losses and delivery losses.
- c. Interconnections with Neighboring Systems:** Interconnections with neighboring systems can help resiliency during drought and/or emergency conditions. Wherever possible, McAllen Public Utility will continue to pursue interconnectivity.

2. Alternate Water Sources

- a. Wastewater Effluent Reclaimed (aka reuse) Water:** This type of water can be considered to have both a direct and indirect conservation benefit. Potable Reuse Technologies exist that can treat water to a potable standard. These projects are generally described as either direct or indirect potable reuse. A more common application is to treat this water down to a non-potable standard. Uses for this non-potable water include landscape irrigation, construction water, cooling water, industrial processing, etc. MPU currently has a non-potable reuse program for water via irrigation of treated wastewater effluent on the City's golf course as well as the master planned community of Tres Lagos. Additionally, MPU has contracts to sell reclaimed water to Calpine and Magic Valley Electric Generation.
- b. Brackish Groundwater Desalination:** McAllen relies almost exclusively on surface water from the Rio Grande River. Numerous studies exist that suggest a plentiful supply of brackish groundwater in our region. In fact, an alternate source study report funded by the Bureau of Reclamation for MPU in 2017 identified Brackish Groundwater Desalinization as a recommended strategy.

3. System Monitoring/Operations

- a. Leak Detection**
- b. SCADA Systems**
- c. Condition Assessments**
- d. Asset Management**

B. Public Education

McAllen Public Utility will inform citizens, improve awareness and promote ongoing water conservation efforts within the City of McAllen.

1. McAllen Public Utility will periodically provide the public with bilingual information (Spanish and English) about the Drought Contingency Plan, including information about the conditions under which each stage of the Drought Contingency Plan is to be initiated or terminated and the drought response measures to be implemented in each stage.
2. MPU has a Water Education and Communications Coordinator on staff who is responsible for promoting ongoing water conservation efforts. This information will

be provided by means of, but not limited to, an appropriate combination of the following items:

- Public service announcements on the McAllen Cable Network.
- Internal and external newsletter announcements and information.
- Press releases, media alerts and social media campaigns.
- Distribution of pamphlets, brochures, and fact sheets.
- Including summarized information, tips, and conservation practices on the McAllen Public Utility website.
- Host special events for McAllen citizens that promote water conservation efforts which include: World Water Day, Drinking Water Week, Customer Service Week, and the Annual Night Out.
- Participate in special public events and educational offerings, by having booths at festivals or fairs.
- Public Water and Wastewater Plant tours.
- Water education presentations and workshops for McAllen-area schools.
- Water education camps for children.
- Water education through organizations such as the International Museum of Art and Science and Quinta Mazatlán.

C. Metering Devices and Universal Metering

1. Metering Devices

New meters, 2 inches and smaller in size, are bought according to the latest revision of "AWWA New Meter Standard for Cold-Water Meters" in order to specify all materials, design, manufacture, and testing of all meters. The manufacturer will guarantee that all new meters will test at 98.1 to 101 percent accurate at the maximum rate and 95 to 101 percent at the "low flow" rate as designed by AWWA Standards Manual M-6 on a meter size for size basis. This ensures accurate and precise measurement of water diverted.

Older meters that may be registering too high or low will be replaced as time permits in order to accurately account for water and lower any unaccounted-for water loss.

2. Metering.

MPU currently meters all water usage except that of fire hydrants and water loss due to leaks, breaks, processing, flushing of mains, and system loss. MPU, however, does keep track of water used by fire hydrants through the city fire department and distribution department.

MPU uses Advanced Utilities Software to maintain billing, to keep accurate records of water consumption, and to identify high and low water users. MPU will test all meters that appear to show unusually high or low water usage based on fluctuating meter data. Water distribution tests meters based on an "as needed" basis when customers complain or a problem arises.

The MPU Water Distribution Department is responsible for maintaining all 61,264 connections (March 2023). Meter readers use a portable meter tester and/or a read-a-flow recorder to test meters in the field. When meters cannot be read in the field, they are taken into a meter shop to be assessed. Priority is always given to water leaks with all other tasks including, service calls, maintenance calls, and other water distribution projects.

In February 2017, JBS Associates, Inc. completed a water distribution audit and leak survey which included a meter management study for MPU. The study included an analysis of production and metered sales from January 2013 to January 2017, and of individually metered water consumption accounts from January 2013 to January 2017. The report made recommendations that are currently being utilized, such as the recommendation to implement quarterly testing of meter accuracy in the case of zero-consumption or low-use accounts.

D. Water Distribution Audit and Leak Survey

In February 2017, JBS Associates, Inc. completed a water distribution audit and leak survey. The audit was conducted to determine causes for unaccounted-for water and develop recommendations for unaccounted-for water recovery in a cost-effective manner. This audit and leak survey is conducted every five (5) years at a minimum. In addition, the following reports are submitted to the Texas Water Development Board that give an overall picture of the MPU's Water System including data on water usage, water loss, conservation efforts and capacities. A Water Use Survey is submitted to the Texas Water Development Board annually on March 1st and The Water Loss Audit Report and the Annual Water Conservation Plan Report are submitted on May 1st.

A continuous leak detection and repair program is carried out by MPU. Meter readers also check for leaks while reading meters and performing regular maintenance. For the year 2017, a full-scale leak detection project was implemented.

E. Plumbing Codes and Retrofit Program

The City does have plumbing codes pursuant to the standard plumbing code issued from the International Code Council. Additionally, Texas Legislature passed laws, which requires plumbing fixtures sold in the state after to meet strict standards that incorporate efficient water use and conservation in new structures. These laws subsequently effects plumbing fixtures sold in the City and will help to eliminate inefficient plumbing fixtures.

F. Water Conservation Landscaping

1. Drip Irrigation

When practical, MPU will advocate the use of drip irrigation for the watering of landscapes for commercial establishments. Also, the use of ornamental fountains will be discouraged except when they recycle and use minimal quantities of water.

Licensed irrigation contractors will be asked to use drip irrigation systems, where possible, and to use water conserving irrigation systems like sprinklers which produce large drips instead of a fine mist and a sprinkler layout which accommodates prevailing wind patterns.

2. City of McAllen Parks and Recreation Department

MPU will continue to work with the City of McAllen Parks and Recreation Department in order to eliminate any wasteful water use. The watering of parks for example will be evaluated and done according to efficient water conserving methods. Municipal pools will also be evaluated for efficient water use.

3. Local Landscape Architects and Local Nurseries

Local landscape architects and local nurseries will be asked and encouraged to utilize efficient irrigation systems and native low water using plants and grasses. Xeriscape gardening and landscaping techniques will also be asked to be promoted.

G. Conservation Oriented Water Rate Structure

1. Rates

The City of McAllen has established three schedules of rates to be charged for the consumption of water supplied through the City water system, as follows. Refer to the City of McAllen ordinances for the current rates

- a. Standard water rate schedule for customers within the City for City of McAllen customers under the City's Certificate of Convenience and Necessity (CCN). *(Ord. No. 2017-27, § I, 5-8-17; Ord. No. 2017-51, § I, 9-25-17; Ord. No. 2019-57, § I, 9-23-19; Ord. No. 2022-114, § I, 9-26-22)*
- b. Standard water rate schedule for areas previously covered by Sharyland Water Supply Corporation Certificate of Convenience and Necessity relating to any buyout phases whereby the City has entered into agreements with Sharyland Water Supply Corporation for buyout of their certified area. *(Ord. No. 2017-27, § I, 5-8-17; Ord. No. 2017-51, § I, 9-25-17; Ord. No. 2019-57, § I, 9-23-19; Ord. No. 2022-114, § I, 9-26-22)*
- c. Standard water rate schedule outside the City. *(Ord. No. 2017-27, § I, 5-8-17)*

H. Monitoring and Records Management Program

A Monitoring and Records Management Program is in place for tracking annual budget allocation for Hidalgo County Irrigation District No. 1, Hidalgo County Irrigation District No. 2, Hidalgo County Irrigation District No. 3, United Irrigation District, Hidalgo County Irrigation District No. 6 and Brownsville Irrigation District to determine water deliveries, sales and losses.

Section V: Sec. 106-120 DROUGHT CONTINGENCY PLAN

In order to conserve the available water supply and protect the integrity of water supply facilities, with particular regard for domestic water use, sanitation, and fire protection, and to protect and preserve public health, welfare, and safety and minimize the adverse impacts of water supply shortage or other water supply emergency conditions, the City of McAllen/McAllen Public Utility hereby adopts the following regulation and restrictions on the delivery and consumption of water.

Water uses regulated or prohibited under this Drought Contingency Plan (Drought Plan) are considered to be non-essential and continuation of such uses during times of water shortage or other emergency water supply conditions are deemed to constitute a waste of water which subjects the offender(s) to penalties as defined in this section

A. Public Involvement

Opportunity for the public to provide input into the preparation of the Drought Contingency Plan was provided by the MPU by scheduling and providing notice of public meetings considering adoption of the Water Conservation and Drought Contingency Plan.

B. Public Education

MPU will periodically provide the public with information about the Drought Contingency Plan, including information about the conditions under which each stage of the Drought Contingency Plan is to be initiated or terminated and the drought response measures to be implemented in each stage. This information will be provided by means of periodic publications in the local newspaper, social media outlets, and utility bill inserts or mail-outs.

C. Coordination with Regional Water Planning Group

The service area of McAllen Public Utility is located within the State of Texas Region M Planning Group and has provided a copy of this Plan to the State of Texas Region M Planning Group.

D. Implementation and Enforcement

The General Manager or his/her designee is hereby authorized and directed to implement the applicable provisions of this Drought Plan upon the determination that such implementation is necessary to protect public health, safety, and welfare. The General Manager, or his/her designee, shall have the authority to initiate or terminate drought or other water supply emergency response measure as described in this Plan. In the case of an emergency situation, such as a canal breakdown, pump failures, line ruptures, etc., the General Manager is authorized to take immediate actions deemed necessary to minimize or mitigate the risks and impacts of the water supply emergency.

E. Application

The provisions of this Drought Plan shall apply to all persons, customers, and property utilizing water provided by McAllen Public Utility. The terms “person” and “customer” as used in the Drought Plan include individuals, corporations, partnerships, associations, and all other legal entities.

Section VI: Sec. 106-121 TRIGGERING CRITERIA FOR DROUGHT RESPONSE STAGES

The General Manager *or* his or her designee shall monitor water supply and demand conditions on a monthly basis and shall determine when conditions warrant initiation or termination of each stage of the plan. Notification will be made through major media outlets. The designated City representative will notify water users when water use restrictions have been eased due to lessening of drought conditions.

The triggering criteria described below are based on the level of the United States share of water in the Falcon-Amistad Reservoirs as reported by the TCEQ Rio Grande Watermaster, and demand on the municipal system capacity. The stages of the drought plan may be rescinded when all of the conditions listed as triggering events have ceased for a period of three (3) consecutive days. Any one of the triggers listed below *may* cause the utility to initiate water restrictions. Please refer to Table 1. Demand, Supply and Emergency Triggers.

Current as of 2023 Water Treatment Plant Capacities:

Southwest Water Treatment Plant: rerated in 2022, 49.0 MGD

Northwest Water Treatment Plant: rerated in 2011, 11.2 MGD

Southwest Water Treatment Plant Ground Well: (rated in 2012) 1.5 MGD

Total System Treatment Capacity: 61.7 MGD

Table 1. Demand, Supply and Emergency Triggers

	Trigger	Action
Demand Triggers	Water demand reaches or exceeds eighty five percent (85%) of delivery capacity for three (3) consecutive days (<i>currently 50.78 MGD</i>)	Public Utility Board may enact Stage Two water restrictions
	Water demand reaches or exceeds 90 percent (90%) of delivery capacity for three (3) consecutive days (<i>currently 53.78 MGD</i>)	Public Utility Board may enact Stage Three water restrictions
	Water demand reaches or exceeds ninety five percent 95% of delivery capacity for three (3) consecutive days (<i>currently 56.76 MGD</i>)	Public Utility Board may enact Stage Four water restrictions
	Water demand reaches or exceeds one hundred percent (100%) of delivery capacity at any time (<i>currently 59.75 MGD</i>)	Public Utility Board may enact Stage Five water restrictions
Supply Triggers	Stage One Water Restrictions at all times unless:	
	Reservoir levels of Amistad/Falcon reach twenty five percent (25%) of capacity	Public Utility Board may enact Stage Two water restrictions
	Reservoir levels of Amistad/Falcon reach fifteen percent (15%) of capacity	Public Utility Board may enact Stage Three water restrictions
	Reservoir levels of Amistad/Falcon reach ten percent (10%) of capacity	Public Utility Board may enact Stage Four water restrictions
	Reservoir levels of Amistad/Falcon reach five percent (5%) of capacity	Public Utility Board may enact Stage Five water restrictions
Emergency Triggers	As determined by utility General Manager, including but not limited to system outage, equipment failure, or supply source contamination	Reduce water use to levels deemed necessary

Section VII: Sec. 106-122 DROUGHT RESPONSE STAGES

A. Notification

1. Public Notification

The MPU General Manager or his/ her designee shall notify the public of implementation. The public will be notified of each stage by means of the following:

Publication in a newspaper of general circulation
 Direct mail to each customer in the water bill
 Public service announcements,
 Signs posted in public places
 Take-home fliers at the public library and community centers
 Social Media

2. Additional Notification:

The MPU General Manager or his/ her designee shall notify directly, or cause to be notified directly, the following individuals and entities:

Mayor / Chairman and members of the City Commission / Utility Board

Fire Chief(s)
City and/or County Emergency Management Coordinator(s)
County Judge and County Commissioner(s)
State Disaster District / Department of Public Safety
TCEQ
Major water users
Critical water users, i.e. hospitals and dialysis centers,
Parks / street superintendents & public facilities managers
Industrial users

- B. The City of McAllen/McAllen Public Utility has an emergency conservation plan that outlines five stages for possible water shortage and/or emergency conditions.

A brief description of the five stages is summarized below.

1. Stage One: Voluntary Conservation.

Voluntary conservation is the first stage of the conservation program and is always in force unless a higher stage is required and enacted. During Stage One, the public is requested to voluntarily limit the amount of water used and only use the amount absolutely necessary for health, business, and irrigation. Notice of such request shall be given by the General Manager through appropriate circulars, television, radio, and newspaper media at his or her discretion.

2. Stage Two: Mandatory Compliance Water Alerts.

During Stage Two, MPU will aim to reduce per capita consumption by two percent (2%). The following restrictions shall apply to all persons:

- a. Irrigation of outdoor vegetation shall be limited except for during the days and times as provided in this section and in such zones as designated herein. Irrigation by drip method or hand-held buckets is permitted at any time in any zone.

Zone 1: Northern City limits on the North, 10th Street on the East, Nolana Avenue on the South and Western City limits on the West—Sunday and Wednesday during the time periods as provided for below.

Zone 2: Northern City limits on the North, Eastern City limits on the East, Nolana on the South and 10th Street on the West—Monday and Thursday during the time periods as provided for below.

Zone 3: Nolana on the North, 10th Street on the East, Business 83 on the South and Western City limits on the West—Tuesday and Friday during the time periods as provided for below.

Zone 4: Nolana on the North, Eastern City limits on the East, Business 83 on the South, 10th Street on the West—Wednesday and Saturday.

Zone 5: Business 83 on the North, 10th Street on the East, Southern City limits on the South and Western City limits on the West—Thursday and Monday during the times as provided for below.

Zone 6: Business 83 on the North, Eastern City limits on the East, Southern City limits on the South, and 10th Street on the West—Friday and Tuesday during the time period as provided below.

Table 2. Map of City Irrigation Zones

Zone 1	10 th Street	Zone 2
Nolana Avenue		
Zone 3		Zone 4
		Business Highway 83
Zone 5		Zone 6

Irrigation may only be conducted during the hours of midnight to 10:00 a.m. and 6:00 p.m. to midnight on the authorized days.

- b. The washing of automobiles, trucks, trailers boats, airplanes and other types of mobile equipment is prohibited, except on designated irrigation days between the hours of 6:00 p.m. to 10:00 a.m. Such washing, when allowed, shall be done with a handheld bucket or a handheld hose equipped with a positive shutoff nozzle for quick rinses.

Exception: Washing may be done at any time on the immediate premises of a commercial carwash or commercial service station. Further, such washing may be exempted from this provision if the health, safety and welfare of the public is contingent upon frequent vehicle cleaning, such as garbage trucks and vehicles to transport food and perishables.

- c. The washing or sprinkling of foundations is prohibited except on designated irrigation days between the hours of 8:00 p.m. and 12:00 midnight.
- d. The refilling or adding of water to residential swimming and/or wading pools is prohibited except on designated irrigation days between the hours of 8:00 p.m. to 10:00 a.m.
- e. The operation of any ornamental fountain or other structure making similar use of water is prohibited except for those fountains or structures with a recycling system.
- f. The use of water for irrigation for golf greens and tees is prohibited except on designated irrigation days between the hours of 6:00 p.m. to 10:00 a.m.

The irrigation of golf course fairways is absolutely prohibited. Provided, however, any golf course utilizing wastewater effluent or raw water is exempted from this provision.

- g. Use of water from fire hydrants shall be limited to firefighting and related activities, and/or other governmental use activities necessary to maintain the health, safety, and welfare of the City.

- ### 3. Stage Three: Mandatory Compliance Water Warning.

During Stage Three, the following restrictions shall apply. All elements of Stage Two, including the goal of two percent (2%) reduction of water use per capita, shall remain in effect in Stage Three except that:

- a. It shall be unlawful for any person to irrigate any outdoor vegetation other than in zones and on the days as designated in Stage Two and only during the hours of midnight to 10:00 a.m. and 7:00 p.m. to midnight on such designated days. Irrigation by drip or hand-held buckets is permitted at any time in any zone.
- b. The watering of golf fairways areas is prohibited unless done with treated wastewater, reclaimed water, or well water.

A water surcharge shall be levied against all customers in the following amounts:

1. Residential/domestic metered customers (5/8 inch 3/4-inch 1-inch meters) shall pay a fifty percent (50%) surcharge for any water used over an amount of 15,000 gallons per month.
2. Irrigation-metered customers shall pay a fifty percent (50%) surcharge for any water used over 10,000 gallons per month.
3. Commercial and industrial metered customers shall pay a ten percent (10%) surcharge for any water used over an amount equal to eighty percent (80%) of the maximum monthly consumption over any one billing cycle out of the last 12 months preceding the month in which the Stage Three designation was implemented.

4. Stage Four: Mandatory Compliance Water Shortages.

During Stage Four, the following restrictions shall apply. All elements of Stage Three, including the goal of two percent (2%) reduction of water use per capita, shall remain in effect in Stage Four except that it shall be unlawful for any person to irrigate any vegetation outdoors except on the following designated days in the zones established herein:

Zone 1 - Sunday
Zone 2 - Monday
Zone 3 - Tuesday
Zone 4 - Wednesday
Zone 5 - Thursday
Zone 6 - Friday

And only during the times established under Stage Three of this section.

- a. All outdoor irrigation of vegetation shall be allowed only between the hours of midnight to 10:00 a.m. and 8:00 p.m. to midnight on designated days.
- b. The washing of automobiles, trucks, trailers, boats, airplanes, and other types of mobile equipment not occurring upon the immediate premises of commercial carwashes and commercial service stations and not in the immediate interest of the public health, safety and welfare shall be prohibited except on designated irrigation days and only on the owners of such vehicles, etc., premises.
- c. Car washes and commercial service stations in the immediate interest of the public health, safety and welfare shall be limited to fifty percent (50%) of their monthly average usage based on the last twelve (12) billing periods for each of such customer. After such usage, the General Manager shall enforce this subsection by terminating water service.
- d. Commercial nurseries, commercial sod farmers, and similarly situated establishments shall water only on designated days between the hours of 10:00 p.m. and 5:00 a.m. and shall use only handheld hoses, drip irrigation systems, or handheld buckets.
- e. The filling, refilling or adding of water, except to maintain the structure integrity of the pool, to swimming and/or wading pools is prohibited.
- f. The operation of any ornamental fountain or similar structure is prohibited.
- g. A water surcharge shall be levied against all customers during Stage Four in the following amounts:
 - 1. Residential/domestic metered customers (5/8-inch, 3/4-inch, and 1-inch meters) shall pay a seventy five percent (75%) surcharge for any water used over an amount 10,000 gallons per month.
 - 2. Those irrigation-metered customers shall pay a seventy five percent (75%) surcharge for any water used.
 - 3. Those commercial and industrial metered customers shall pay a ten percent (10%) surcharge for any water used over an amount equal to sixty percent (60%) of the maximum monthly consumption over any one billing cycle out of the last twelve (12) months preceding the month in which the Stage Four designation was implemented.

5. Stage Five: Mandatory Compliance Water Shortage Emergency

During Stage Five, the following restrictions shall apply. All elements of Stage Four, including the goal of two percent reduction (2%) of water use per capita, shall remain in effect in Stage Five except that:

- a. No applications for new, additional, further expanded, or increased-in-size water service connections, meters, service lines, pipeline extensions, mains, or other water service facilities of any kind shall be allowed, approved or installed except as approved by the Public Utility Board.
- b. All allocations of water use to non-essential industrial and commercial customers shall be reduced to amounts as established by the Public Utility Board.

- c. The maximum monthly water use allocation for residential customers may be established with revised rate schedules and penalties by the City Commission on recommendation by the Public Utility Board.
- d. Irrigation is permitted only by:
 - 1. Handheld or faucet filled bucket;
 - 2. Continuously handheld hoses;
 - 3. Drip irrigation during the hours from 6:00 a.m. to 8:00 a.m., once every ten (10) days, by a schedule established by the General Manager.
- e. The washing of automobiles, trucks, trailers boats, airplanes, and other types of mobile equipment not occurring upon the immediate premises of commercial carwashes and commercial service stations and not in the immediate interest of the public health, safety and welfare shall be prohibited.
- f. A water surcharge shall be levied against all customers during Stage Five in the following amounts:
 - 1. Residential/domestic metered customers shall pay a one hundred percent (100%) surcharge for any water used over an amount of 8,000 gallons per month.
 - 2. Those irrigation-metered customers shall pay a one hundred percent (100%) surcharge for any water used.
 - 3. Those commercial and industrial metered customers shall pay a ten percent (10%) surcharge for any water used over an amount equal to twenty percent (20%) of the maximum monthly consumption over any one billing cycle out of the last twelve (12) months preceding the month in which the Stage Five designation was implemented.

Section VIII: Sec. 106-123 VARIANCES

The General Manager, or his or her designee, may grant temporary variance from the provisions of the Drought Plan if the person requesting the variance can satisfactorily demonstrate that failure to grant such variance would adversely affect the health, sanitation, or fire protection of the public or the person requesting such variance, and if one or more of the following conditions are met:

- a. Compliance with this Plan cannot be technically accomplished during the duration of the water supply shortage or other condition for which the plan is in effect.
- b. Alternative methods can be implemented which will achieve the same level of reduction in water use.

Section IX: Sec. 106-124 PENALTY OF VIOLATION

Any person violating any provision of the Plan after order and notice as specified in this division shall be deemed guilty of an offense, and, upon conviction, shall be punished as prescribed in this Code, section 1-14, provided, however, a first offense shall be punishable by a fine of not to exceed two hundred dollars (\$200.00), exclusive of court costs. In the event of a second subsequent conviction of said person for violating any provision of this division during an emergency conservation period, the minimum fine shall be not less than three hundred dollars (\$300.00) exclusive of court costs. A third conviction during the emergency conservation period by the same person shall be punished by a fine of not less than four hundred dollars (\$400.00)

exclusive of court costs. The violation of each provision of this division, and each separate violation thereof, shall be deemed a separate offense, and shall be punished accordingly. Provided, however, compliance may be further sought through injunctive relief in the district court.

For purposes of this division, in any case where water has been used in any manner contrary to any provision of this section, It shall be presumed that the person, individual corporation, or partnership in whose name a water meter connected is registered with McAllen Public Utility as the customer on the water account for the property where the violation occurs or originates shall be presumed to be the violator.

It shall be presumed that the utility customer has intentionally and knowingly, recklessly, or negligently made, caused, used, or permitted to be used, the water in such a contrary manner.

In any prosecution charging a violation of this section: Proof that the violations occurred in this property serviced by the utility connection the name of the account holder thereof shall constitute in evidence a *prima facie* presumption that the registered customer of such account was the person responsible at the place and time during which such violation occurred.

Any City of McAllen Environmental and Code Compliance Department personnel or authorized utility department personnel may:

Issue citations for violations of this division to the person he reasonably believes to be in violation of this article. The citation shall be prepared in duplicate and shall contain the name and address of the violator, if known, the offense charged and shall direct such person to appear at the city municipal court no later than ten days from the date of service of the citation.

The alleged violator shall be requested to sign the citation and shall be served a copy of the citation. Service of the citation shall be complete upon the attempt to give it to the alleged violator, to an agent or employee of the violator or to a person over fourteen (14) years of age who is a member of the violator's family or a resident at the violator's residence. In the event no person is available to sign the complaint, a copy of the complaint shall be left at the address of the violator, which shall constitute notice of violation.

Corporations will be served in accordance with the Code of Criminal Procedure.

City of McAllen Environmental and Code Compliance Department citations issued for violations of this section shall be of the same force and effect as a citation issued under section 61-2 of this Code. The citations issued for violations of this division will provide that if a person fails to answer such citation, that a municipal court complaint will be sworn to upon a failure to respond to the citation.

Upon continuous violations of any mandated stage, the General Manager may provide for a notice of disconnections of water services for deferred periods. Anyone receiving such notice may appeal the same to the utility board by giving written notice therefore, within seventy two (72) hours of receipt of notice of disconnection. Prior to the reconnection of service, the standard reconnection fee shall be paid. (*Ord. No. 2017-27, § I, 5-8-17*)

Section X: Sec. 106-125 ADMINISTRATIVE PENALTIES

In lieu of the charge for violation of the division as set out in Section [106-124] Penalty of Violation, the General Manager may provide that any person violating, shall be subject to an administrative charge being added to their monthly utility bill, which such charge shall be payable as part of the monthly water utility bill. Such payment shall be subject to the disconnecting procedures as set out in section 106-221 of this chapter, including the right to

appeal such disconnect notice to the General Manager's authorized representative, as set out in such section.

City of McAllen Environmental and Code Compliance personnel or Utility Department personnel may issue notice of violation and notice of administrative charge to be imposed when such officer or personnel reasonably believes that a violation of the article has occurred. The administrative charge shall be established by minute order of the Public Utility Board from time to time, and shall compensate the Public Utility System for activities such as issuing citations, inspecting properties, administering its conservation program including public education. Such charge may be tiered based on the number of frequency of violations and the public health concerns relating to various stages of conservation measures.

A notice of administrative charge shall be left, when possible, at the structure at the location of the violation of the City's conservation ordinance.

The person receiving such administrative notice or the person responsible for the account under which the administrative charge will be assessed, may appeal the imposition of the administrative assessment prior to the issuance of the utility bill by contacting the General Manager or her or his authorized representative if such party believes there has been an error in such charge or there is some other reason there is no justification for the charge being issued. The General Manager or her or his authorized representative is hereby authorized to make determinations concerning the assessment of administrative charges, upon the appeal of any such parties. (*Ord. No. 2017-27, § I, 5-8-17*)

ORDINANCE NO. 2023-_____
ORDER NO. 2023-_____

AN ORDINANCE AMENDING THE CODE OF ORDINANCES OF THE CITY OF MCALLEN CHAPTER 106 (“UTILITIES”); ARTICLE III (“WATER”), DIVISION 5 (“WATER”) CONSERVATION AND DROUGHT CONTINGENCY PLAN”)BY ADOPTION OF THE REVISED AND UPDATED WATER CONSERVATION AND DROUGHT CONTINGENCY PLAN; PROVIDING FOR AN EFFECTIVE DATE; PROVIDING FOR PUBLICATION; PROVIDING FOR SEVERABILITY; AND ORDAINING OTHER PROVISION RELATED TO THE SUBJECT MATTER HEREOF.

WHEREAS, Title 30, Chapter 288 of the Texas Administrative Code and the regulation of the Texas Commission on Environmental Quality (“TCEQ”) require that the City of McAllen adopt a Water Conservation Plan; and,

WHEREAS, the McAllen City Commission deems it in the best interest of the City to adopt the City of McAllen Public Utility Water Conservation and Drought Contingency Plan revised and updated April 2023; and,

WHEREAS, the McAllen Public Utility Board of Trustees has heretofore adopted a Water Conservation and Drought Contingency Plan that requires revising and updating;

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF COMMISIONERS OF THE CITY OF MCALLEN, TEXAS, THAT:

SECTION I: The McAllen City Commission hereby adopts the City of McAllen Public Utility Water Conservation and Drought Contingency Plan revised and updated April 2023, a true and correct copy of which is attached hereto.

SECTION II: That, this ordinance shall take effect immediately upon its passage and publication in accordance with law.

SECTION III: The City Secretary is hereby authorized and directed to cause the caption of this ordinance to be published in a newspaper having general circulation in McAllen, Texas in accordance with the provision of the Code of Ordinances of the City of McAllen, Section 2-56.

SECTION IV: The City Secretary is hereby authorized and directed to cause the contents of Section I and hereof to be published in the appropriate location in the Code of Ordinances of the City of McAllen.

SECTION V: If any part or parts of this Ordinance are found to be invalid or unconstitutional by a court having competent jurisdiction, then such invalidity or unconstitutionality shall not affect the remaining parts hereof and such remaining parts shall remain in full force and effect, and to that extent this Ordinance is considered severable.

CONSIDERED, PASSED and APPROVED this 24th day of April, 2023, at a regular meeting of the Board of Commissioners of the City of McAllen, Texas at which a quorum was present and which was held in accordance with Chapter 551 of the Texas Government Code.

SIGNED this _____ day of April, 2023.

CITY OF MCALLEN

Javier Villalobos, Mayor

ATTEST

Perla Lara, TRMC, City Secretary

APPROVED AS TO FORM:

Isaac J. Tawil, City Attorney

CONSIDERED, PASSED and APPROVED this 25th day of April, 2023, at a regular meeting of the McAllen Public Utility Board of Trustees of the City of McAllen, Texas at which a quorum was present and which was held in accordance with Chapter 551 of the Texas Government Code.

SIGNED this _____ day of April, 2023.

CITY OF MCALLEN

Charles Amos, Chairman

ATTEST

Juan J. Rodriguez, Assistant General Manager/ Interim Board Secretary

APPROVED AS TO FORM:

Isaac J. Tawil, City Attorney



AGENDA ITEM

2.b.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/19/2023

MEETING DATE

4/25/2023

1. Agenda Item: Approval of the Fire Fighter Training Facility Subdivision.
2. Party Making Request:
Rafael Balderas Jr.
3. Nature of Request: Request of MPU Board approval from the developer of the proposed subdivision.
4. Budgeted:

Bid Amount:	_____	Budgeted Amount:	_____
Under Budget:	_____	Over Budget:	_____
		Amount Remaining:	_____
5. Reimbursement: N/A.
6. Routing:
Rafael Balderas Jr. Created/Initiated - 4/19/2023
7. Staff's Recommendation: Staff recommend approval of the proposed subdivision with the conditions set forth.
8. City Attorney: Approve. IJT
9. MPU General Manager: Approved - MAV
10. Director of Finance for Utilities: Approved - MDC

Memo

TO: Marco A. Vega, P.E., General Manager
J.J. Rodriguez, Asst. General Manager

THRU: Marco Ramirez, P.E., Utility Engineer
Carlos Gonzalez, P.E., Utility Engineer

FROM: Rafael A. Balderas, E.I.T., Asst. to the Utility Engineer

DATE: April 17, 2023

SUBJECT: **Fire Fighter Training Facility Subdivision; Consideration & Approval of the Subdivision**

This property is located on the east side of La Lomita Road, approximately 800 feet south of Sprague Road (7 Mile). It is located within the McAllen City Limits and is being proposed as a training facility. The tract consists of 15 acres and will be a single lot.

The subdivision application was originally filed with the City on September 22, 2022 and receive preliminary P&Z approval on October 18, 2022. The information required from the developer's engineer for this agenda was received on April 19, 2023.

Utility plan/availability is described as follows:

1. **Water Service:** The applicant is proposing to install a water service to service the facility, which would connect to an existing 8-inch waterline that runs along the south property line. An additional fire hydrant will be installed as well for fire protection.
2. **Wastewater Service:** The applicant is proposing to install a wastewater service line to service the facility, which would connect to an existing 8-inch wastewater line that runs on the south side of the property.
3. The property does not fall within any reimbursement service areas.

Staff recommends MPUB approval of the subdivision application as proposed subject to the following: 1.) Dedication of a utility easement, possibly along the perimeter of the property, and where the main utility lines will be installed/exist; 2.) Installation of the proposed public utility infrastructure be constructed as proposed; and 3.) Installation of individual water services for each unit.

I'll be available for further discussion/questions at the MPUB meeting.

MEMORANDUM

Date: February 03, 2023
To: Rafael Balderas, McAllen PUB
From: Mario A. Reyna, P.E.
Subject: Fire Fighter Training Facility

Following is a description of the water and sewer as proposed for the above referenced subdivision:

WATER - MPUB

The domestic water will be served by City of McAllen. There is an existing 8-inch waterline along the East side of La Lomita Road that runs north and south and intersects with an existing 8-inch waterline along Brazos Street on the north side. Proposing to connect on the waterline along Brazos Street with a proposed 2" water meter for domestic and a 1" water meter for irrigation to provide service for the proposed site.

SEWER:

The sanitary sewer will be served by City of McAllen. There is an existing 8-inch sanitary sewer line along the west side of La Lomita Road that runs north and south and intersects with an existing 8-inch sanitary sewer line along Brazos Street on the south side. Proposing to connect on the sanitary sewer line along Brazos Street with a proposed 6" sanitary sewer service to provide service for the proposed site.



Thank You,
Mario A. Reyna, P.E.

REIMBURSEMENT WAIVER

STATE OF TEXAS X

COUNTY OF HIDALGO X

THIS CERTIFICATE, issued by the McAllen Public Utility (MPUB), as authorized by such Board of Trustees, hereinafter called the MPUB to City of McAllen hereinafter called the DEVELOPER.

1. The DEVELOPER is the developer of the following described property:

Fire Fighter Training Facility and proposes to construct Utility Improvements as shown on a plan
(Subdivision Name)

designed by Melden and Hunt dated _____, hereinafter called the
(Engineering Firm)

IMPROVEMENTS, as approved by the McAllen Public Utility Board on _____.
(Approval date)

2. By the execution of this certificate, the Developer hereby waives and disclaims the right to obtain reimbursement from Intervening Developers in accordance with the MPUB's Reimbursement Policy.

ISSUED in triplicate originals this _____ day of _____, 201__.

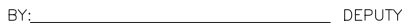
CITY OF McALLEN BY THE
McALLEN PUBLIC UTILITY

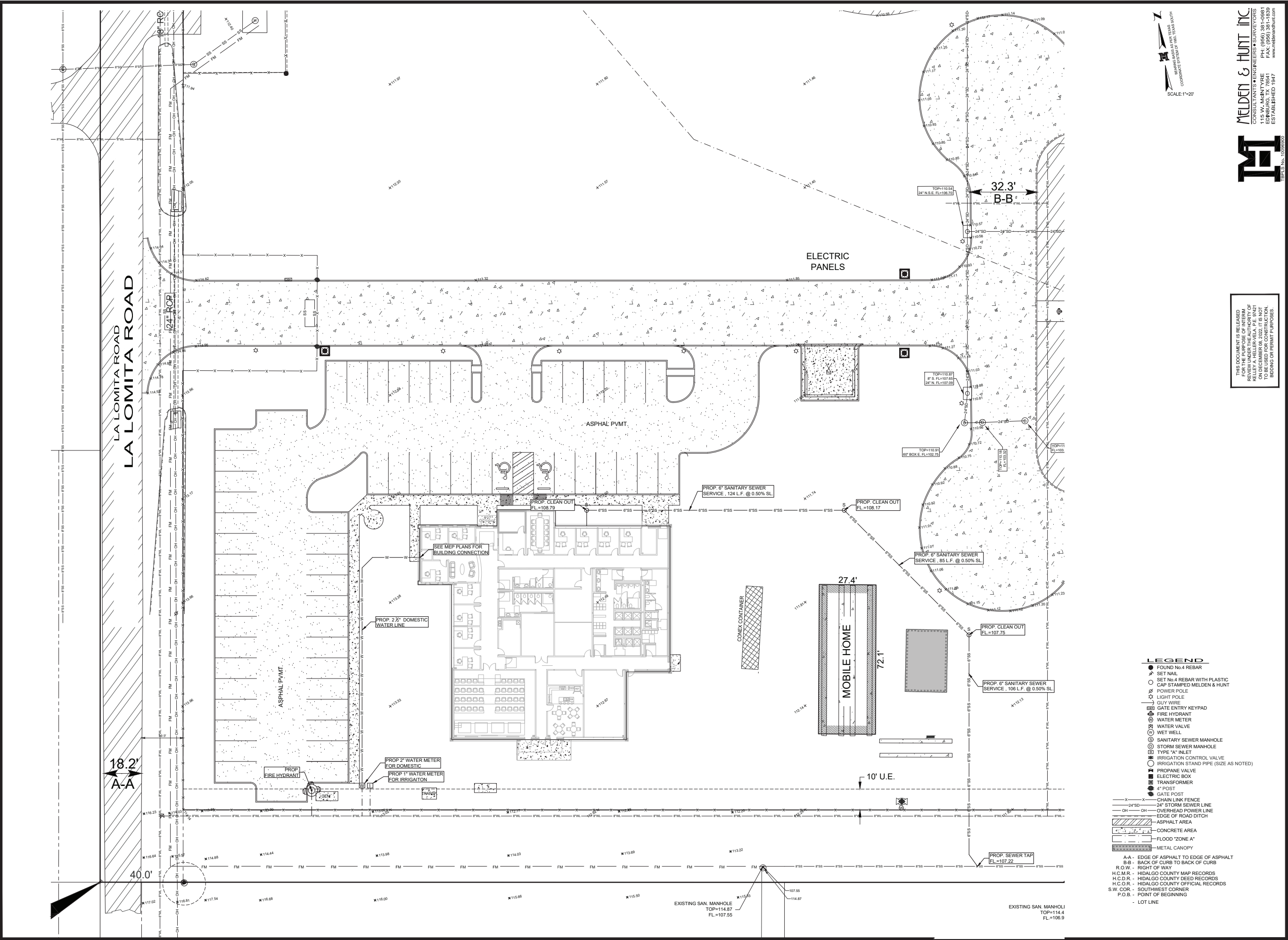
BY: _____
Mark Vega, P.E.
General Manager, McAllen Public Utility
Post Office Box 220
McAllen, Texas 78505-0220
(956) 681-1630

ATTEST:

Board Secretary

DEVELOPER
BY: City of McAllen
Address: _____





SCALE: 1"=20'

MELDEN & HUNT INC.
CONSULTANTS • ENGINEERS • SURVEYORS
115 W. MCINTYRE
CORPUS CHRISTI, TEXAS 78401
ESTABLISHED 1947
PH: (361) 381-0981
T: (361) 381-0981
F: (361) 381-0981
WWW.MELDENANDHUNT.COM

THIS DOCUMENT IS RELEASED
FOR THE PURPOSE OF INTERIM
REVIEW UNDER THE AUTHORITY OF
KELLEY A. HELLERVELA, P.E. 07421
IT IS NOT TO BE USED FOR CONSTRUCTION,
BIDDING OR PERMIT PURPOSES.

- LEGEND**
- FOUND No. 4 REBAR
 - SET NAIL
 - SET No. 4 REBAR WITH PLASTIC CAP STAMPED MELDEN & HUNT
 - ✱ POWER POLE
 - ✱ LIGHT POLE
 - ✱ GUY WIRE
 - ⊞ GATE ENTRY KEYPAD
 - ⊞ FIRE HYDRANT
 - ⊞ WATER METER
 - ⊞ WATER VALVE
 - ⊞ WET WELL
 - ⊞ SANITARY SEWER MANHOLE
 - ⊞ STORM SEWER MANHOLE
 - ⊞ TYPE "A" INLET
 - ⊞ IRRIGATION CONTROL VALVE
 - ⊞ IRRIGATION STAND PIPE (SIZE AS NOTED)
 - ⊞ PROPANE VALVE
 - ⊞ ELECTRIC BOX
 - ⊞ TRANSFORMER
 - ⊞ 4" POST
 - ⊞ GATE POST
 - CHAIN LINK FENCE
 - 24" STORM SEWER LINE
 - OVERHEAD POWER LINE
 - EDGE OF ROAD DITCH
 - ▨ ASPHALT AREA
 - ▨ CONCRETE AREA
 - ▨ FLOOD "ZONE A"
 - ▨ METAL CANOPY
 - A-A - EDGE OF ASPHALT TO EDGE OF ASPHALT
 - B-B - BACK OF CURB TO BACK OF CURB
 - R.O.W. - RIGHT OF WAY
 - H.C.M.R. - HIDALGO COUNTY MAP RECORDS
 - H.C.D.R. - HIDALGO COUNTY DEED RECORDS
 - H.C.O.R. - HIDALGO COUNTY OFFICIAL RECORDS
 - S.W. COR. - SOUTHWEST CORNER
 - P.O.B. - POINT OF BEGINNING
 - LOT LINE

GIGNAC ARCHITECTS
ARCHITECTURE • CONSTRUCTION MANAGEMENT
416 STARR STREET
CORPUS CHRISTI, TEXAS 78401
T 361.884.2661
F 361.884.4232
222 E. VAN BUREN, SUITE 102
HARLINGEN, TEXAS 78550
T 956.365.4820
F 956.365.4822
3700 N. 10TH, SUITE 205
MCALLEN, TEXAS 78501
T 956.686.0100
F 956.622.7313

CONSULTANTS
CIVIL: Melden & Hunt
STRUCTURAL:
Chaning Engineering
MEP:
DBR Inc.
LANDSCAPE & IRRIGATION:
Heffner Design Team

100% CD REVIEW SET



FIRE TRAINING FACILITY
McALLEN, TEXAS

Project Number: 22481.04
Drawing Date: NOV. 16, 2022
Drawn: CESAR
Checked:
Scale: AS SHOWN
ACAD File:

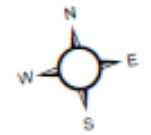
Revisions:

NO.	DESCRIPTION

Sheet Title:
UTILITY LAYOUT
C3

Y:\Land Development\Commercial\McAllen\22143 - Gignac - Fire Training Facility\dwg\hna\22481.04-FLA.dwg, 12/07/2022 2:27:12 PM, DWG, 16, PDF, p.3

FIRE FIGHTER TRAINING FACILITY



1 inch = 274 feet

Legend

- Proposed Clean-Out
- Proposed Manholes
- ⚙ Proposed Fire Hydrant
- ⚙ Existing Fire Hydrants
- Proposed Force Main
- Proposed Sewer Line
- Proposed Water Line
- Proposed Sewer

Type of Main

- Force Main
- Existing Waterline
- Proposed Area



AGENDA ITEM

2.c.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/18/2023

MEETING DATE

4/25/2023

1. Agenda Item: Approval of Mikada Subdivision
2. Party Making Request:
Rafael Balderas Jr.
3. Nature of Request: Request of MPU Board approval from the developer of the proposed subdivision.
4. Budgeted:

Bid Amount:	_____	Budgeted Amount:	_____
Under Budget:	_____	Over Budget:	_____
		Amount Remaining:	_____
5. Reimbursement: Waterline Reimbursement to the developer of Taylor Commercial Point Sub. for the Taylor Commercial Point Water Project in the amount of \$5,616.89. Wastewater Line Reimbursement to the developer of Taylor Commercial Point Sub. for the Taylor Commercial Point Wastewater Project in the amount of \$8,871.30. Waterline Reimbursement to MPU for the Bentsen Road Water Project in the amount of \$662.46. Wastewater Line Reimbursement to MPU for the Bentsen Road Wastewater Project in the amount of \$4,604.18.
6. Routing:
Rafael Balderas Jr. Created/Initiated - 4/18/2023
7. Staff's Recommendation: Staff recommends approval of the proposed subdivision with the conditions set forth.
8. City Attorney: Approve. IJT
9. MPU General Manager: Approved - MAV
10. Director of Finance for Utilities: Approved - MDC

Memo

TO: Marco A. Vega, P.E., General Manager
J.J. Rodriguez, Asst. General Manager

THRU: Marco Ramirez, P.E., Utility Engineer
Carlos Gonzalez, P.E., Utility Engineer

FROM: Rafael A. Balderas, E.I.T., Asst. to the Utility Engineer

DATE: April 17, 2023

SUBJECT: **Mikada Subdivision; Consideration & Approval of the Subdivision**

This property is located on the north side of Pecan Boulevard and approximately 360 feet east of Taylor Road. It is located within the McAllen City Limits and is being proposed as C-3 commercial. The tract consists of 2 acres and will be a single lot for retail commercial use.

The subdivision application was originally filed with the City on January 30, 2023 and receive preliminary P&Z approval on February 21, 2023. The information required from the developer's engineer for this agenda was received on April 17, 2023.

Utility plan/availability is described as follows:

1. **Water Service:** The applicant is proposing to install a water service to service the property, which would connect to an existing 8-inch waterline that runs along the east property line. Staff recommends that an 8-inch waterline be installed along the south property line, which would connect to the existing flush valve that was set from the neighboring property to the west. Fire hydrants will be installed as needed.
2. **Wastewater Service:** The applicant is proposing to install a wastewater service line to service the property, which would connect to an existing 8-inch wastewater line that runs on the south side of the property.
3. The property falls within the MPU: Bentsen Road and Dev.: Taylor Commercial Point Water and Wastewater reimbursement service areas.

Staff recommends MPUB approval of the subdivision application as proposed subject to the following: 1.) Dedication of a utility easement, possibly along the perimeter of the property, and where the main utility lines will be installed; 2.) Installation of the proposed public utility infrastructure be constructed as recommended; 3.) Installation of individual water services for each suite/unit; 4.) Payment of a Waterline Reimbursement to the developer of Taylor Commercial Point Sub. in the amount of \$5,616.89 for the Taylor Commercial Point Water Project; 5.) Payment of a Wastewater Line Reimbursement to the developer of Taylor Commercial Point Sub. in the amount of \$8,871.30; 6.) Payment of a Waterline Reimbursement to MPU in the amount of \$662.46 for the Bentsen Road Water Project; and 7.) Payment of a Wastewater Line Reimbursement to MPU in the amount of \$4,604.18 for the Bentsen Road Wastewater Project.

I'll be available for further discussion/questions at the MPUB meeting.

JAVIER HINOJOSA ENGINEERING/Consulting Engineers

416 E. Dove Avenue • McAllen, Texas 78504

Tel: (956) 668-1588

javier@javierhinojosaeng.com

TBPELS FIRM NO. F-1295

Mikada Subdivision Water and Sanitary Sewer Description

Water

Mikada Subdivision will be served by existing 12" water line along the south property line, and an existing 8" water along the east property line. Lot 1 will be served by a 2" water service connecting to the existing 8" water line. Fire hydrants will be constructed in accordance with fire code as determined by site plan.

Sanitary Sewer

Mikada Subdivision will be served by existing 8" sewer line along the south property line. Lot 1 will be served by a 6" sewer service connecting to the existing 8" sewer line.


Javier Hinojosa, P.E.



3/2/23

REIMBURSEMENT WAIVER

STATE OF TEXAS X

COUNTY OF HIDALGO X

THIS CERTIFICATE, issued by the McAllen Public Utility (MPUB), as authorized by such Board of Trustees, hereinafter called the MPUB to Mikada, LLC hereinafter called the DEVELOPER.

1. The DEVELOPER is the developer of the following described property:

Mikada Subdivision and proposes to construct Utility Improvements as shown on a plan
(Subdivision Name)

designed by Javier Hinojosa Engineering dated March 2023 hereinafter called the
(Engineering Firm)

IMPROVEMENTS, as approved by the McAllen Public Utility Board on _____
(Approval date)

2. By the execution of this certificate, the Developer hereby waives and disclaims the right to obtain reimbursement from Intervening Developers in accordance with the MPUB's Reimbursement Policy.

ISSUED in triplicate originals this _____ day of _____, 2023.

CITY OF McALLEN BY THE
McALLEN PUBLIC UTILITY

BY: _____
Mark Vega, P.E.
General Manager, McAllen Public Utility
Post Office Box 220
McAllen, Texas 78505-0220
(956) 681-1630

ATTEST:

Board Secretary

DEVELOPER

BY: _____
Mikada, LLC
400 W. Nolana, Ste. H2
McAllen, Texas 78504
By: Jose Chanin, Manager

**SUBDIVISION REIMBURSEMENT WORKSHEET
MIKADA SUBDIVISION**

WATER LINE REIMB. CALCULATIONS

WATER: MPU: BENTSEN ROAD WATER
COST: \$301.12 x 2 AC \$602.24
10% ADMIN FEE <10 YEARS 60.22

WATER LINE REIMBURSEMENT \$662.46

SEWER LINE REIMB. CALCULATIONS

SEWER: MPU: BENTSEN ROAD SEWER
COST: \$2,092.81 x 2 AC \$4,185.62
10% ADMIN FEE <10 YEARS 418.56

SEWER LINE REIMBURSEMENT \$4,604.18

WATER LINE REIMB. CALCULATIONS

WATER: DEV OF TAYLOR COMMERCIAL POINT WATER
COST: \$2,553.13 x 2 AC \$5,106.26
10% ADMIN FEE <10 YEARS 510.63

WATER LINE REIMBURSEMENT \$5,616.89

SEWER LINE REIMB. CALCULATIONS

SEWER: DEV OF TAYLOR COMMERCIAL POINT SEWER
COST: \$4,032.41 x 2 AC \$8,064.82
10% ADMIN FEE <10 YEARS 806.48

SEWER LINE REIMBURSEMENT \$8,871.30

TOTAL REIMBURSEMENT DUE \$19,754.83

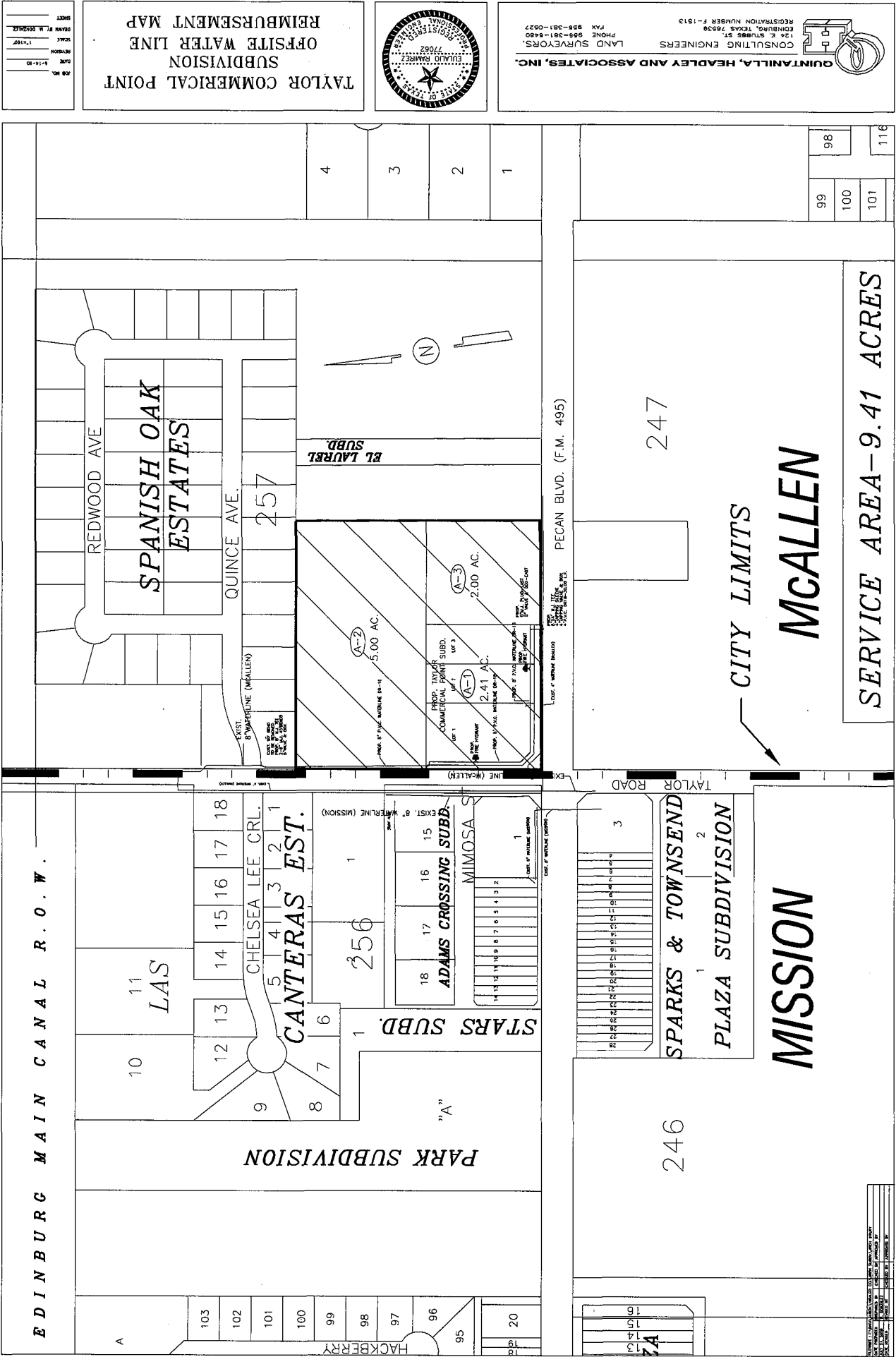
Prepared By: RB Date: 4/14/2023 Reviewed By: _____

Escrows will be adjusted upon execution of Final Reimbursement Certificate

I hereby agree to pay amounts indicated above and any additional costs determined in the Final Reimbursement Certificate as approved by McAllen Public Utility Board.

Signature: 

Print: Jose Chanin



[illegible]

18		17		16		15	
ADAMS CROSSING SUBD.							

MINOSA ST

14	13	12	11	10	9	8	7	6	5	4	3	2	1
----	----	----	----	----	---	---	---	---	---	---	---	---	---

STARS SUBD.

14	13	12	11	10	9	8	7	6	5	4	3	2
MIMOSA ST												
1												

SPARKS & TOWNSEND
PLAZA SUBDIVISION

MISSION

TAYLOR ROAD

247

CITY LIMITS

McALLEN

SERVICE AREA-13.95 ACRES

99		98	97	BE
100				
101				

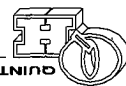
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TAYLOR COMMERCIAL POINT
SUBDIVISION
OFFSITE SEWER LINE
REIMBURSEMENT MAP

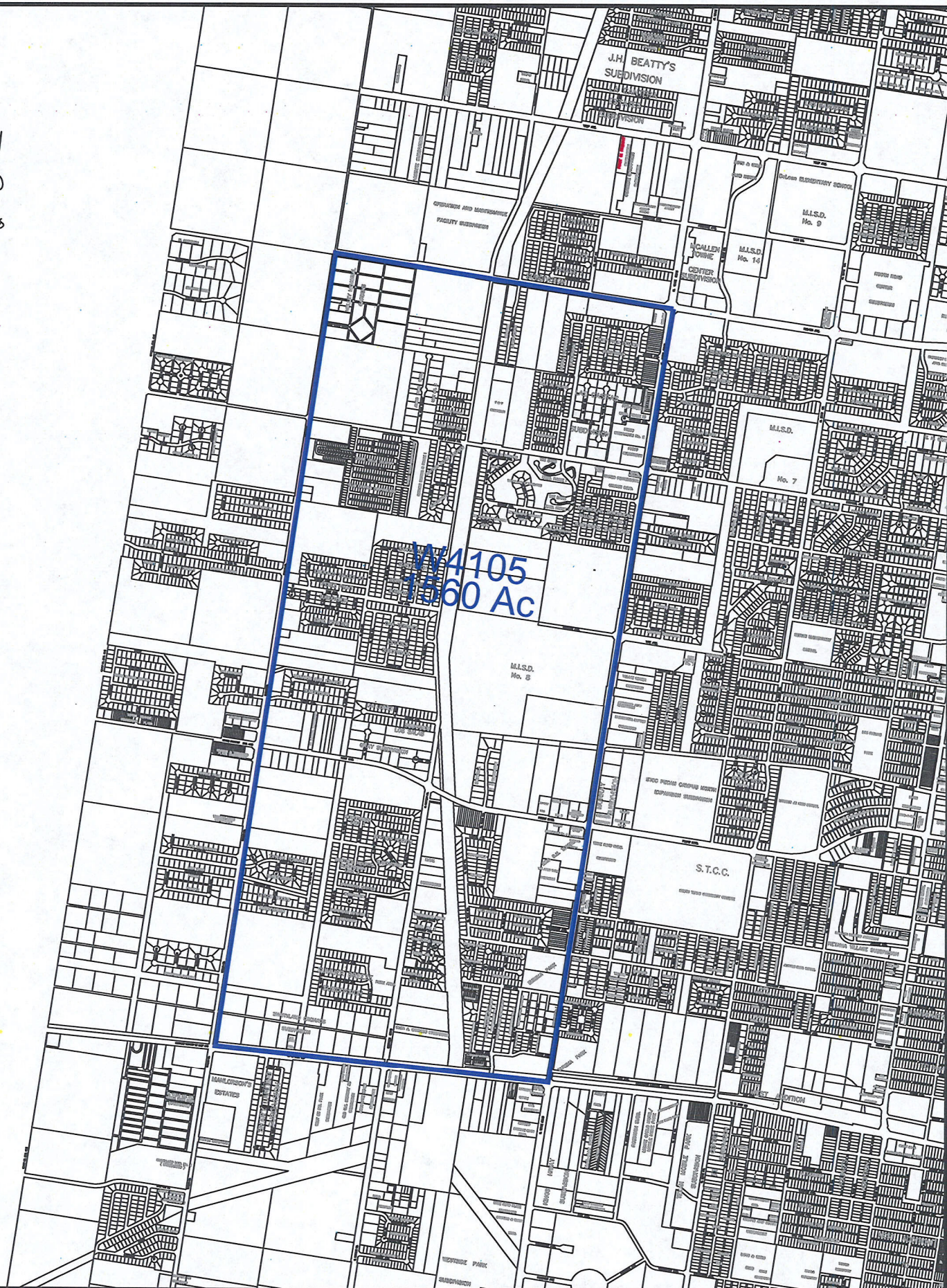


LAND SURVEYORS
PHONE 958-381-6480
FAX 958-381-0527

CONSULTING ENGINEERS,
124 E. STUBBS ST.,
EDINBURG, TEXAS 78539
REGISTRATION NUMBER F-1513



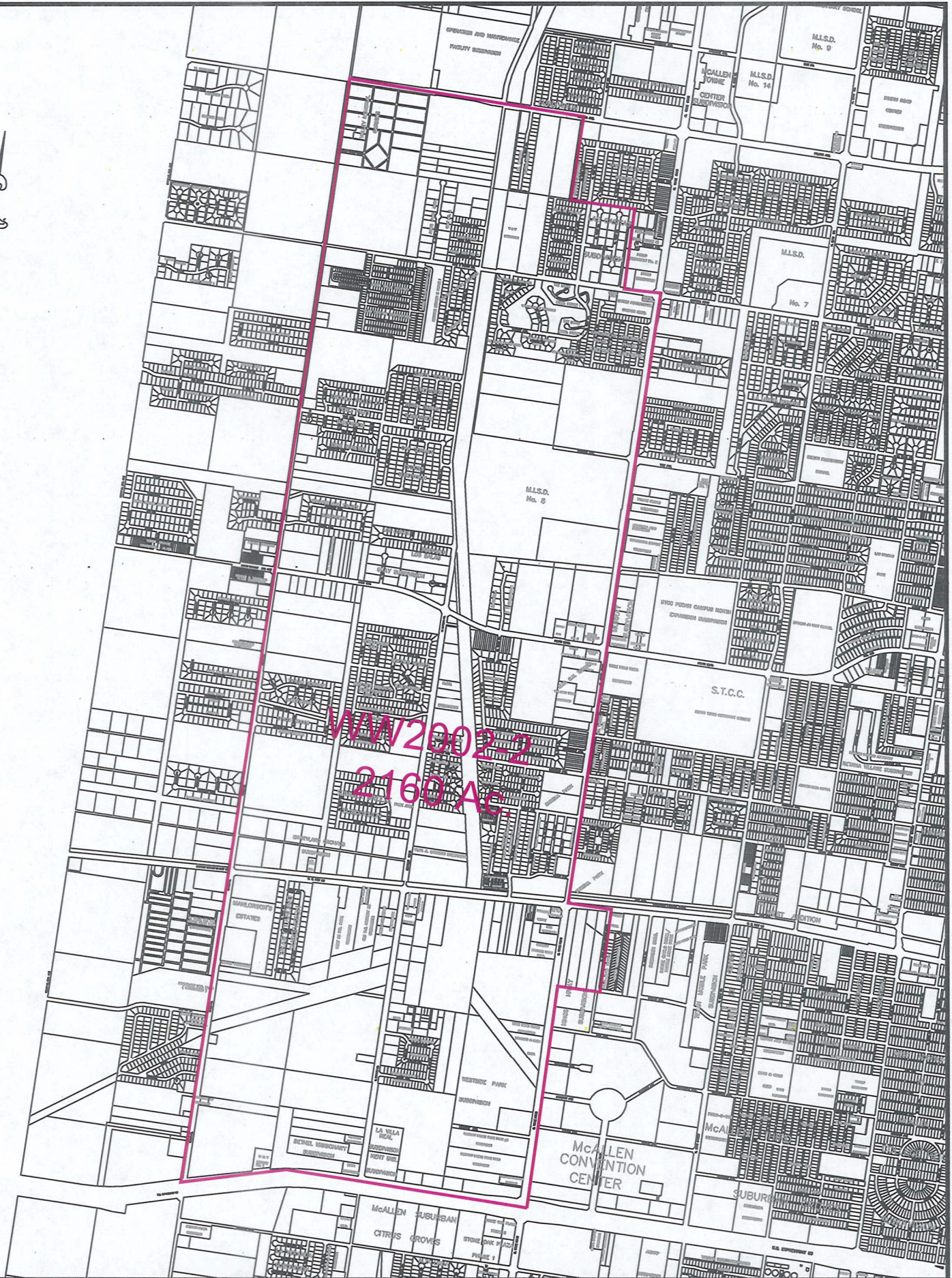
_____ JCS NO.
 _____ DATE
 _____ 9-14-10
 _____ REVISION
 _____ SCALE
 _____ DRAWN BY M. 000023
 _____ SHEET



McALLEN
PUBLIC UTILITY



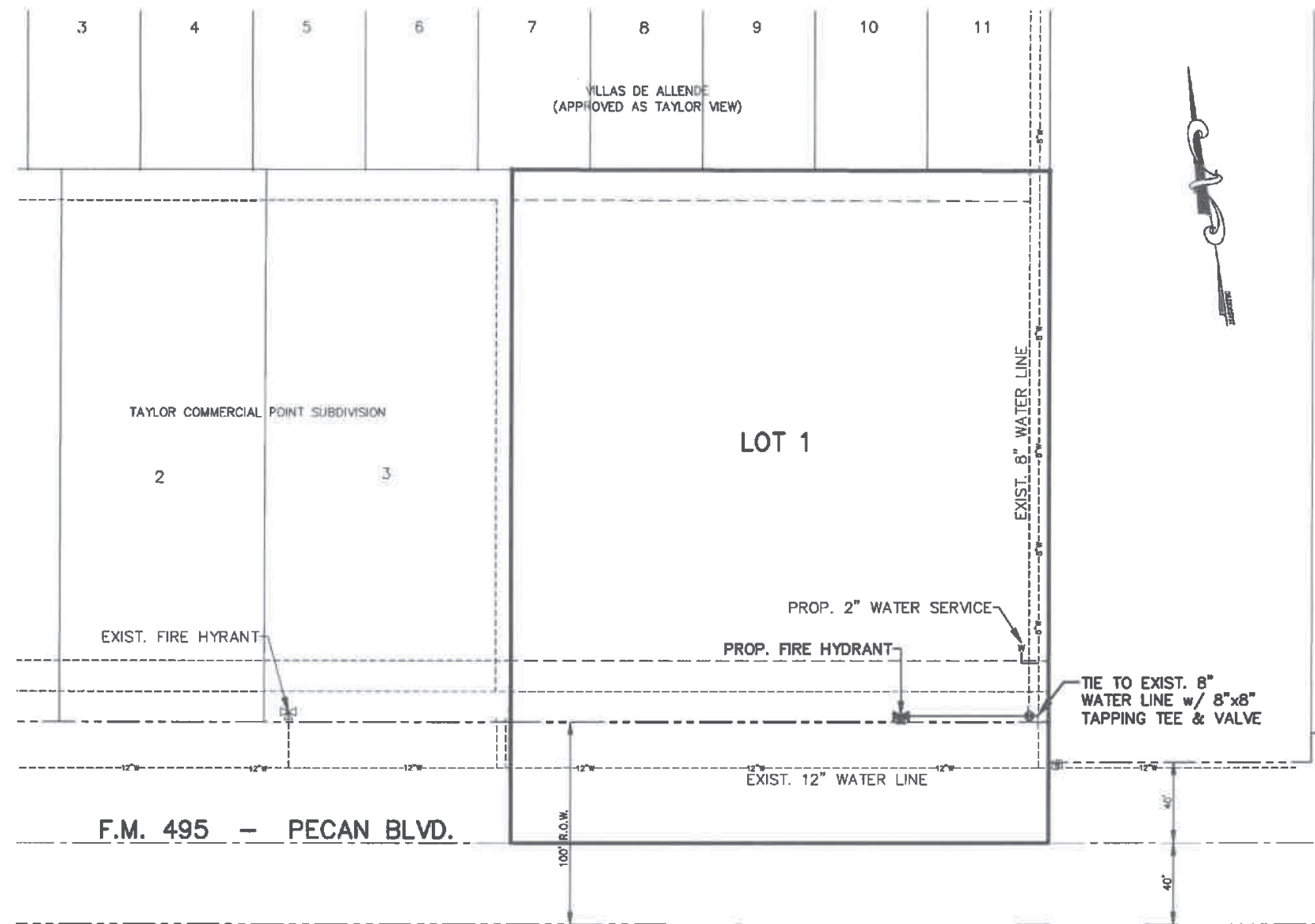
N.T.S.



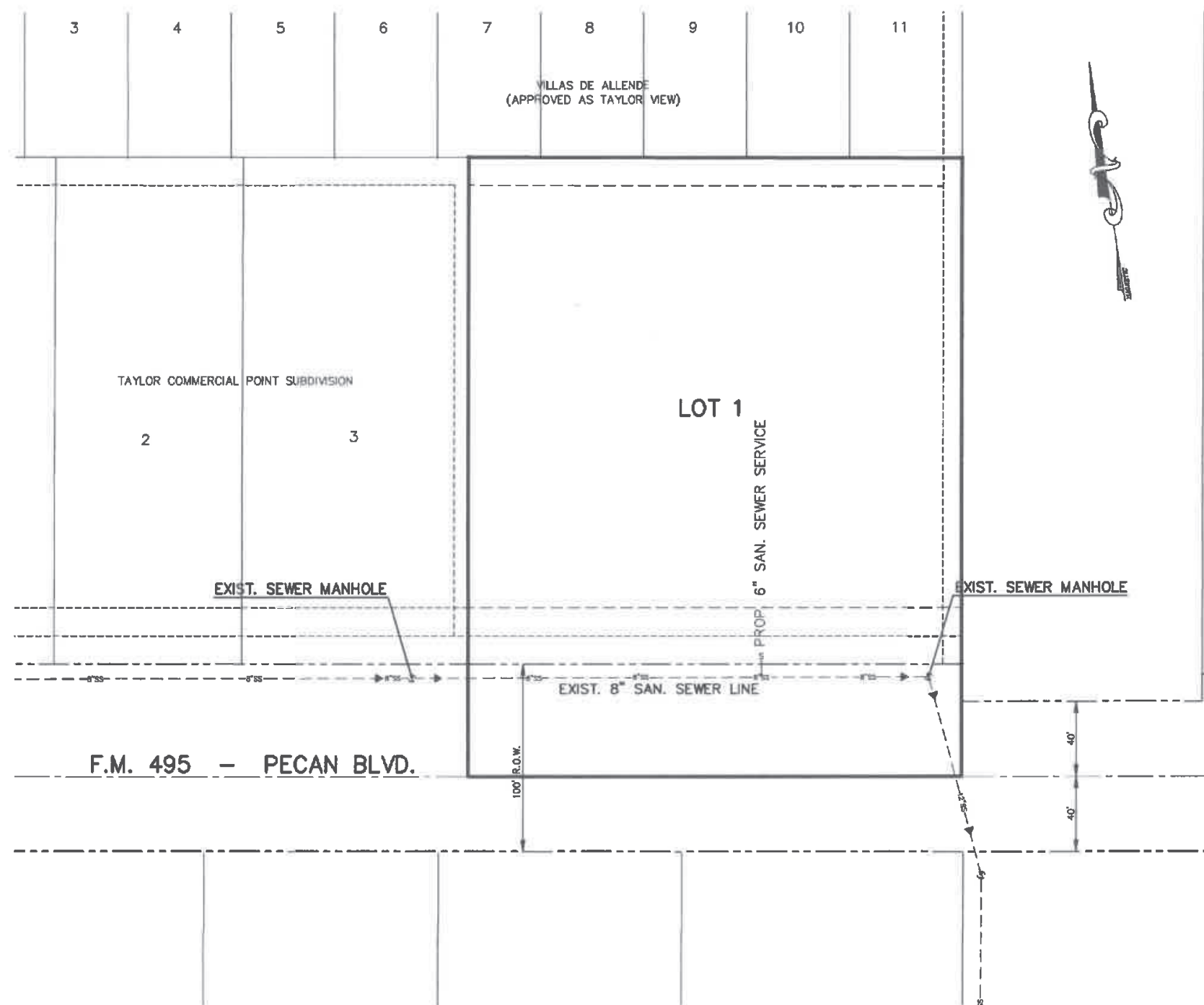
BENTSEN ROAD SEWER
SERVICE AREA



McALLEN
PUBLIC UTILITY

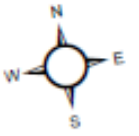


PROPOSED WATER LAYOUT MIKADA SUBDIVISION



PROPOSED SANITARY SEWER LAYOUT

MIKADA SUBDIVISION



1 inch = 70 feet

- Legend**
- Proposed Clean-Out
 - Proposed Manholes
 - Proposed Fire Hydrant
 - Existing Fire Hydrants
 - Proposed Force Main
 - Proposed Sewer Line
 - Proposed Water Line
 - Proposed Sewer
- Type of Main**
- Force Main
 - Existing Waterline
 - Proposed Area



AGENDA ITEM

2.d.

PUBLIC UTILITY BOARD

**DATE SUBMITTED
MEETING DATE**

**04/18/2023
4/25/2023**

1. Agenda Item: Approval of Silver Oak Subdivision.
2. Party Making Request:
Rafael Balderas Jr.
3. Nature of Request: Request of MPU Board approval from the developer of the proposed subdivision.
4. Budgeted:

Bid Amount:		Budgeted Amount:	
Under Budget:		Over Budget:	
		Amount Remaining:	
5. Reimbursement: Waterline Reimbursement to MPU for the Northgate Water Project in the amount of \$3,592.24.
6. Routing:
Rafael Balderas Jr. Created/Initiated - 4/18/2023
7. Staff's Recommendation: Staff recommends approval of the proposed subdivision with the conditions set forth.
8. City Attorney: Approve. IJT
9. MPU General Manager: Approved - MAV
10. Director of Finance for Utilities: Approved - MDC

Memo

TO: Marco A. Vega, P.E., General Manager
J.J. Rodriguez, Asst. General Manager

THRU: Marco Ramirez, P.E., Utility Engineer
Carlos Gonzalez, P.E., Utility Engineer

FROM: Rafael A. Balderas, E.I.T., Asst. to the Utility Engineer

DATE: April 17, 2023

SUBJECT: **Silver Oak Subdivision; Consideration & Approval of the Subdivision**

This property is located on the south side of future Hobbs Street and on the west side of Bicentennial Boulevard. It is located within the McAllen City Limits and is being proposed as R-1 residential. The tract consists of 2.92 acres and will be 5 lots for single family homes.

The subdivision application was originally filed with the City on March 15, 2023 and receive preliminary P&Z approval on April 4, 2023. The information required from the developer's engineer for this agenda was received on April 17, 2023.

Utility plan/availability is described as follows:

1. **Water Service:** The applicant is proposing to install an 8-inch waterline to service the property which would connect to an existing 8-inch waterline just north of the property. An additional fire hydrant is being proposed. Staff recommends the waterline go to-and-through the property to the west side property line.
2. **Wastewater Service:** The applicant is proposing to install an 8-inch wastewater line to service the property that would connect to an existing 8-inch wastewater line north of the tract. Staff recommends that the wastewater line go to-and-through the property to the west side property line.
3. The property falls within the MPU: Northgate Water reimbursement service area.

Staff recommends MPUB approval of the subdivision application as proposed subject to the following: 1.) Dedication of a utility easement, possibly along the perimeter of the property, and where the main utility lines will be installed; 2.) Installation of the proposed public utility infrastructure be constructed as recommended; and 3.) Payment of a Waterline Reimbursement to MPU in the amount of \$3,592.24 for the Northgate Water Project.

I'll be available for further discussion/questions at the MPUB meeting.

JAVIER HINOJOSA ENGINEERING/Consulting Engineers

416 E. Dove Avenue • McAllen, Texas 78504

Tel: (956) 668-1588

javier@javierhinojosaeng.com

TBPELS FIRM NO. F-1295

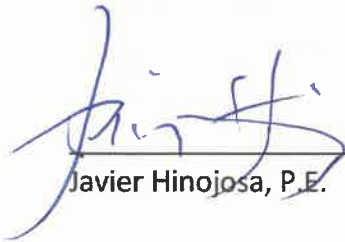
Silver Oak Subdivision Water and Sanitary Sewer Description

Water

This 5-lot single family subdivision will be connecting to a City of McAllen 8" water line located along the east side of Hobbs Drive Street with an 8" water line extending south to a flush valve at the end of the cul-de-sac. Each lot will be served by a 1" water service. A fire hydrant will be placed at the street entrance onto Hobbs Drive to meet the City of McAllen fire regulations.

Sanitary Sewer

This subdivision will tie to an existing 8" sewer stub out at the southwest corner of 18th Street and Hobbs Drive. An 8" sewer line will be extended to the end of the cul-de-sac with each lot being served by a 4-inch sewer service and clean-out at the end of the service.


Javier Hinojosa, P.E.



REIMBURSEMENT WAIVER

STATE OF TEXAS X

COUNTY OF HIDALGO X

THIS CERTIFICATE, issued by the McAllen Public Utility (MPUB), as authorized by such Board of Trustees, hereinafter called the MPUB to RD Silver Oak, LLC hereinafter called the DEVELOPER.

1. The DEVELOPER is the developer of the following described property:

Silver Oak Subdivision and proposes to construct Utility Improvements as shown on a plan
(Subdivision Name)

designed by Javier Hinojosa Engineering dated March, 2023, hereinafter called the
(Engineering Firm)

IMPROVEMENTS, as approved by the McAllen Public Utility Board on _____.
(Approval date)

2. By the execution of this certificate, the Developer hereby waives and disclaims the right to obtain reimbursement from Intervening Developers in accordance with the MPUB's Reimbursement Policy.

ISSUED in triplicate originals this _____ day of _____, 2023.

CITY OF McALLEN BY THE
McALLEN PUBLIC UTILITY

BY: _____
Mark Vega, P.E.
General Manager, McAllen Public Utility
Post Office Box 220
McAllen, Texas 78505-0220
(956) 681-1630

ATTEST:

Board Secretary

DEVELOPER
BY:  _____
RD Silver Oak, LLC
By: Jason E. Garza, President
P.O. Box 6105
McAllen, Texas 78502

**SUBDIVISION REIMBURSEMENT WORKSHEET
SILVER OAK SUBDIVISION**

WATER LINE REIMB. CALCULATIONS				
WATER:	MPU: NORTHGATE WATER			
COST:	\$1,118.38	x	2.92 AC	\$3,265.67
10% ADMIN FEE	<10 YEARS			326.57
WATER LINE REIMBURSEMENT				\$3,592.24

TOTAL REIMBURSEMENT DUE **\$3,592.24**

Prepared By: JB Date: 4/14/2023 Reviewed By: _____

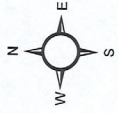
Escrows will be adjusted upon execution of Final Reimbursement Certificate

I hereby agree to pay amounts indicated above and any additional costs determined in the Final Reimbursement Certificate as approved by McAllen Public Utility Board.

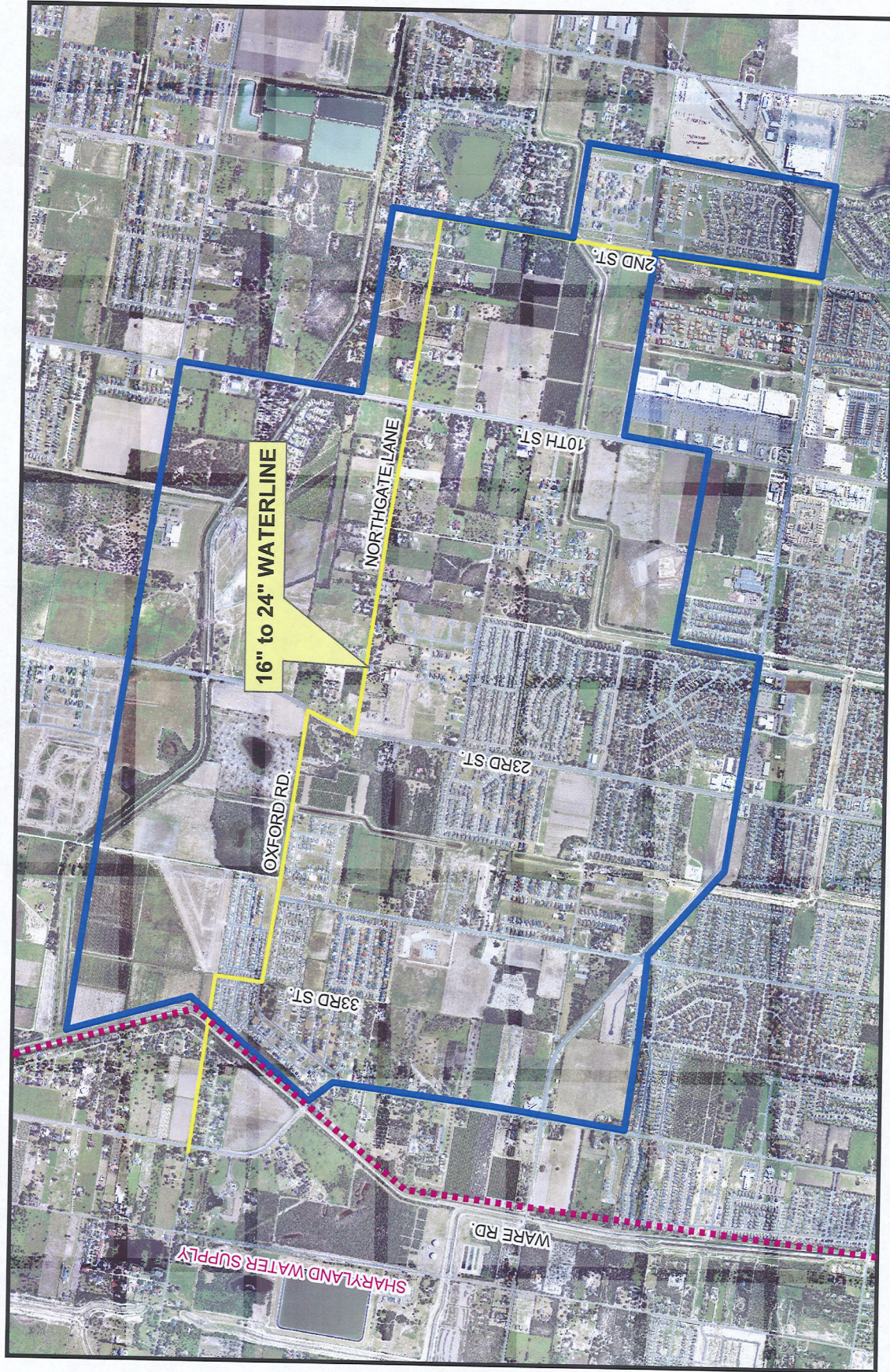
Signature: 

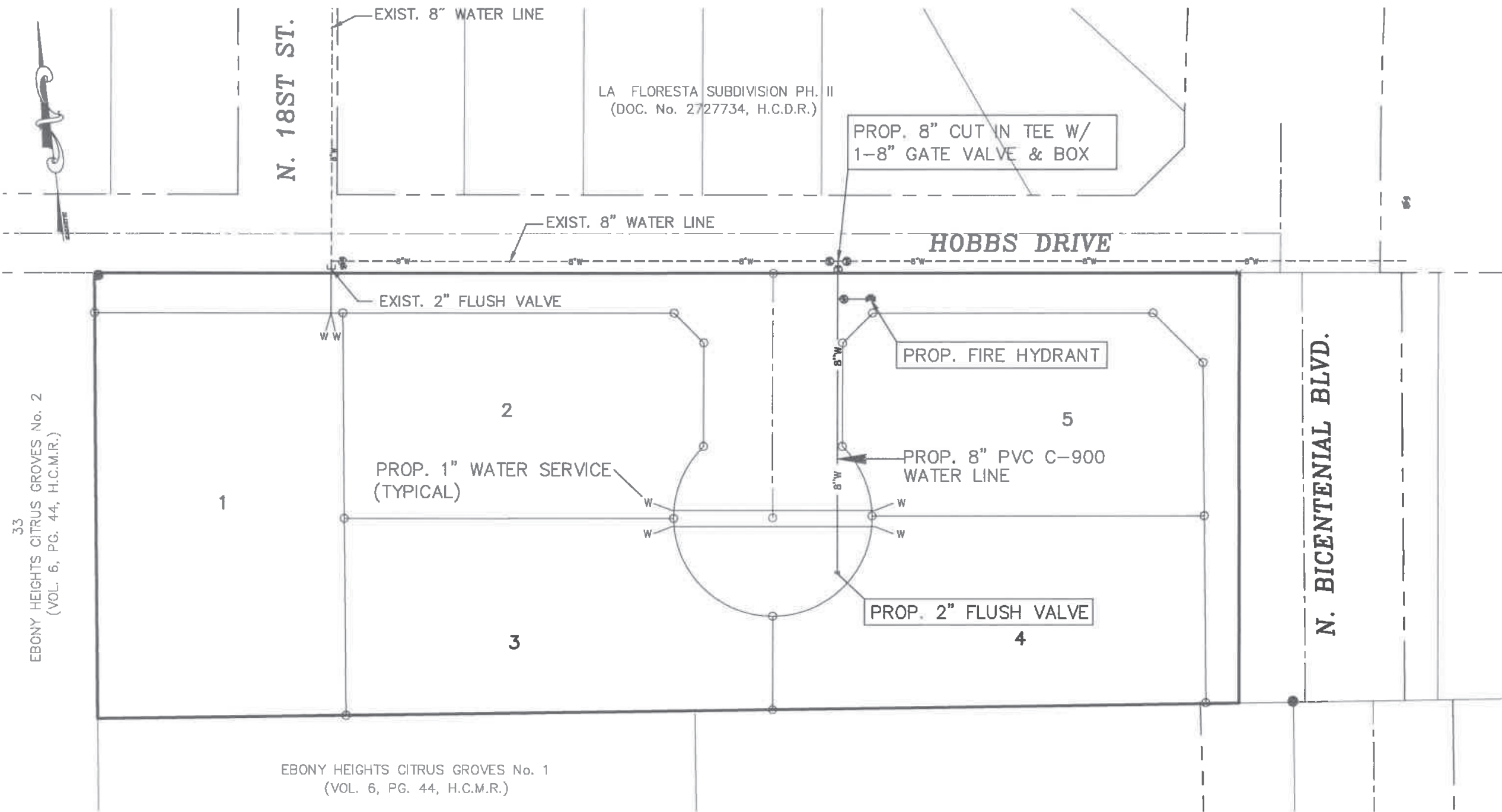
Print: JASON GARZA

NORTHGATE SERVICE AREA (2500 Ac.)

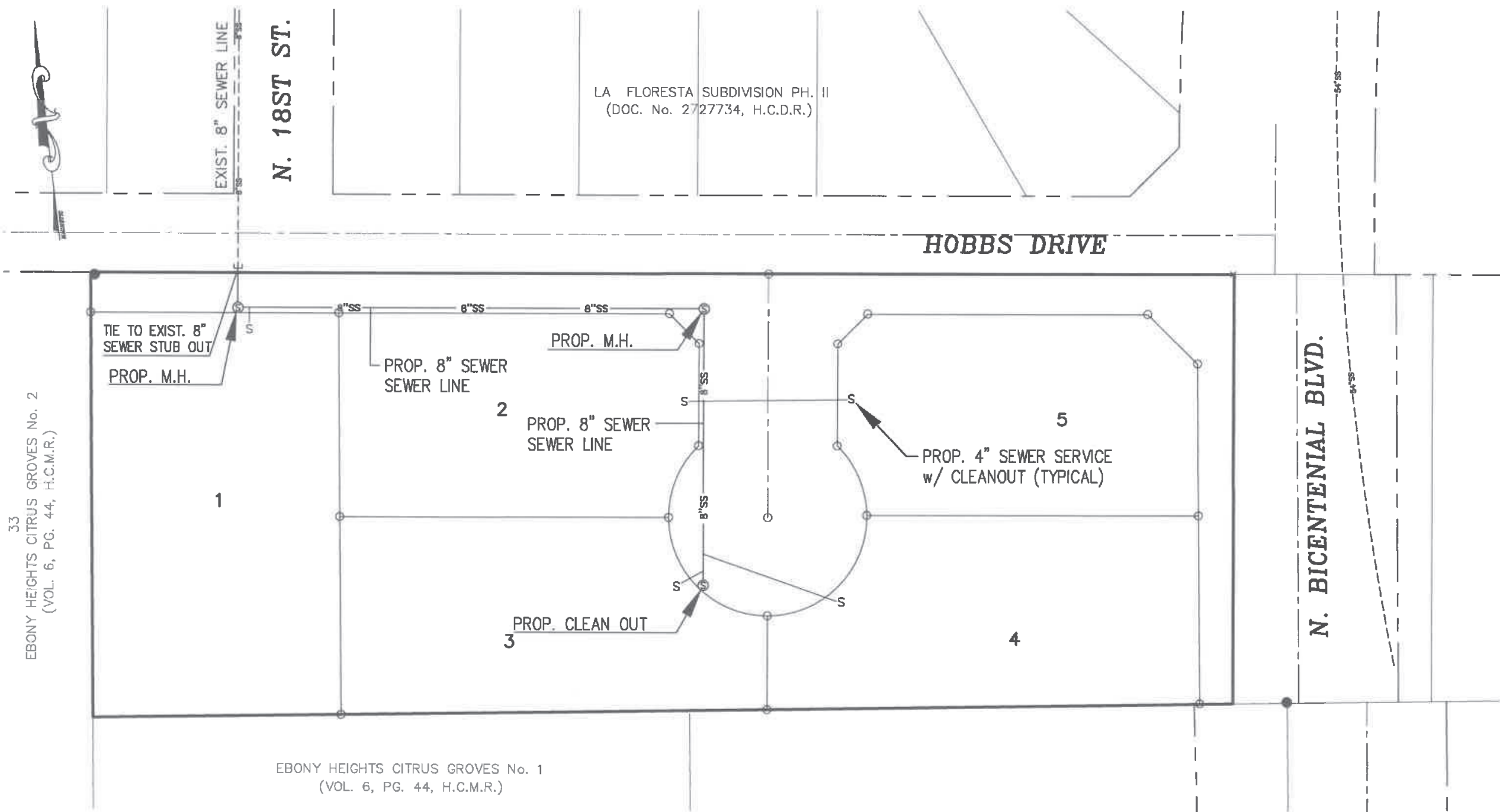


1 inch = 1,500 feet

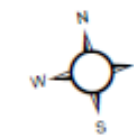




PROPOSED WATER LAYOUT SILVER OAK SUBDIVISION



PROPOSED SEWER LAYOUT SILVER OAK SUBDIVISION



1 inch = 104 feet

- Legend**
-  Proposed Clean-Out
 -  Proposed Manholes
 -  Proposed Fire Hydrant
 -  Existing Fire Hydrants
 -  Proposed Force Main
 -  Proposed Sewer Line
 -  Proposed Water Line
 -  Proposed Sewer
- Type of Main**
-  Force Main
 -  Lots
 -  Existing Waterline
 -  Proposed Area



AGENDA ITEM

2.e.

PUBLIC UTILITY BOARD

**DATE SUBMITTED
MEETING DATE**

**04/18/2023
4/25/2023**

1. Agenda Item: Approval of Vargas Patrimony Subdivision.
2. Party Making Request:
Rafael Balderas Jr.
3. Nature of Request: Request of MPU Board approval from the developer of the proposed subdivision.
4. Budgeted:

Bid Amount:	_____	Budgeted Amount:	_____
Under Budget:	_____	Over Budget:	_____
		Amount Remaining:	_____
5. Reimbursement: Waterline Reimbursement to MPU for the Central McAllen Distribution Water Project in the amount of \$137.32.
6. Routing:
Rafael Balderas Jr. Created/Initiated - 4/18/2023
7. Staff's Recommendation: Staff recommends approval of the proposed subdivision with the conditions set forth.
8. City Attorney: Approve. IJT
9. MPU General Manager: Approved - MAV
10. Director of Finance for Utilities: Approved - MDC

Memo

TO: Marco A. Vega, P.E., General Manager
J.J. Rodriguez, Asst. General Manager

THRU: Marco Ramirez, P.E., Utility Engineer
Carlos Gonzalez, P.E., Utility Engineer

FROM: Rafael A. Balderas, E.I.T., Asst. to the Utility Engineer

DATE: April 17, 2023

SUBJECT: **Vargas Patrimony Subdivision; Consideration & Approval of the Subdivision**

This property is located on the east side of 29th Street and approximately 500 feet north of Erie Avenue. It is located within the McAllen City Limits and is being proposed as R-2 residential. The tract consists of 0.495 acres and will be 2 lots for multi-family use.

The subdivision application was originally filed with the City on November 15, 2022 and receive preliminary P&Z approval on December 6, 2022. The information required from the developer's engineer for this agenda was received on April 18, 2023.

Utility plan/availability is described as follows:

1. **Water Service:** The applicant is proposing to install water services to service each lot, which would connect to an existing 8-inch waterline that runs along 29th Street.
2. **Wastewater Service:** The applicant is proposing to install wastewater services to service each lot, which would connect to an existing 8-inch wastewater line that runs on the east side of the tract.
3. The property falls within the MPU: Central McAllen Distribution Water reimbursement service area.

Staff recommends MPUB approval of the subdivision application as proposed subject to the following: 1.) Dedication of a utility easement, possibly along the perimeter of the property, and where the main utility lines will be installed; 2.) Installation of the proposed public utility infrastructure be constructed as recommended; 3.) Installation of individual water services for each unit/suite; and 4.) Payment of a Waterline Reimbursement to MPU in the amount of \$137.32 for the Central McAllen Distribution Water Project.

I'll be available for further discussion/questions at the MPUB meeting.

MAS ENGINEERING, LLC

TBPE Firm No. 15499

WATER AND SANITARY SEWER NARRATIVE

For

Vargas Patrimony Subdivision

McAllen, Texas

BEING 0.495 ACRES OUT TRACT NUMBER FIVE AND SIX OF AN UNRECORDED PLAT OF THAT 5.0 ACRE TRACT OUT OF LOT 146, LA LOMITA IRRIGATION AND CONSTRUCTION COMPANY'S SUBDIVISION, VOLUME 24, PAGE 68, DEED RECORDS OF HIDALGO COUNTY, TEXAS, SAME BEING OUT OF THE FOLLOWING TWO TRACTS: A CALLED 0.23 ACRE TRACT, CONVEYED TO MIGUEL A. VARGAS, RECORDED IN DOCUMENT NO. 3129727, OFFICIAL PUBLIC RECORDS HIDALGO COUNTY, TEXAS.

THIS IS 2 LOTS OF MULTIFAMILY SUBDIVISION (FOURPLEX). THE PROPERTY IS LOCATED ON EAST SIDE OF 29TH STREET, SOUTH OF US HIGHWAY BUSINESS 83, WITHIN THE CITY OF MCALLEN, TEXAS.

WATER SUPPLY DESCRIPTION

VARGAS PATRIMONY SUBDIVISION HAS AN EXISTING 8" WATER LINE RUNNING ALONG 29TH STREET ON THE EAST SIDE. THE SUBDIVISION PROPOSED TO INSTALL 2 1" WATER SERVICES FOR SUBDIVISION. THIS WILL BE PROVIDE WITH POTABLE WATER.

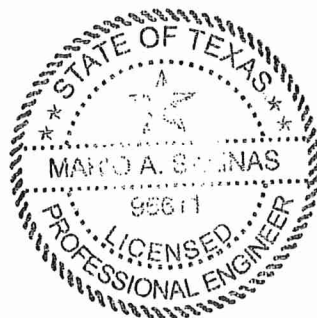
THERE IS AN EXISTING FIRE HYDRANT ALONG THE 29TH STREET THAT IS LOCATED IN THE CENTER OF THE SUBDIVISION.

SANITARY SEWER SYSTEM DESCRIPTION

THE VARGAS PATRIMONY SUBDIVISION HAS AN EXISITING 8" SANITARY SEWER SYSTEM RUNNING ALONG THE REAR OF THE PROPOSED SUBDIVISION THROUGH PUBLIC EASEMENTS. THE PROPOSED SUBDIVISION WILL PROVIDED 2 6" SANITARY SEWER SERVICES (1 FOR EACH LOT).



MARIO A. SALINAS, P.E.



REIMBURSEMENT WAIVER

STATE OF TEXAS X

COUNTY OF HIDALGO X

THIS CERTIFICATE, issued by the McAllen Public Utility (MPUB), as authorized by such Board of Trustees, hereinafter called the MPUB to **MIGUEL & JOHANA VARGAS** hereinafter called the DEVELOPER.

1. The DEVELOPER is the developer of the following described property:

VARGAS PATRIMONY SUBDIVISION and proposes to construct Utility Improvements as shown on a plan
(Subdivision Name)

designed by **MAS ENGINEERING, LLC.** dated _____, hereinafter called the
(Engineering Firm)

IMPROVEMENTS, as approved by the McAllen Public Utility Board on _____
(Approval date)

2. By the execution of this certificate, the Developer hereby waives and disclaims the right to obtain reimbursement from Intervening Developers in accordance with the MPUB's Reimbursement Policy.

ISSUED in triplicate originals this _____ day of _____, 202__.

CITY OF McALLEN BY THE
McALLEN PUBLIC UTILITY

BY: _____
Mark Vega, P.E.
General Manager, McAllen Public Utility
Post Office Box 220
McAllen, Texas 78505-0220
(956) 681-1630

ATTEST:

Board Secretary

DEVELOPER

BY: Miguel A. Varg

Address: **901 W. SOLAR DRIVE**
MISSION, TEXAS 78574

**SUBDIVISION REIMBURSEMENT WORKSHEET
VARGAS PATRIMONY SUBDIVISION**

WATER LINE REIMB. CALCULATIONS

WATER: MPU: CENTRAL MCALLEN DISTRIBUTION
COST: \$252.20 x 0.495 AC \$124.84
10% ADMIN FEE <10 YEARS 12.48

WATER LINE REIMBURSEMENT \$137.32

TOTAL REIMBURSEMENT DUE \$137.32

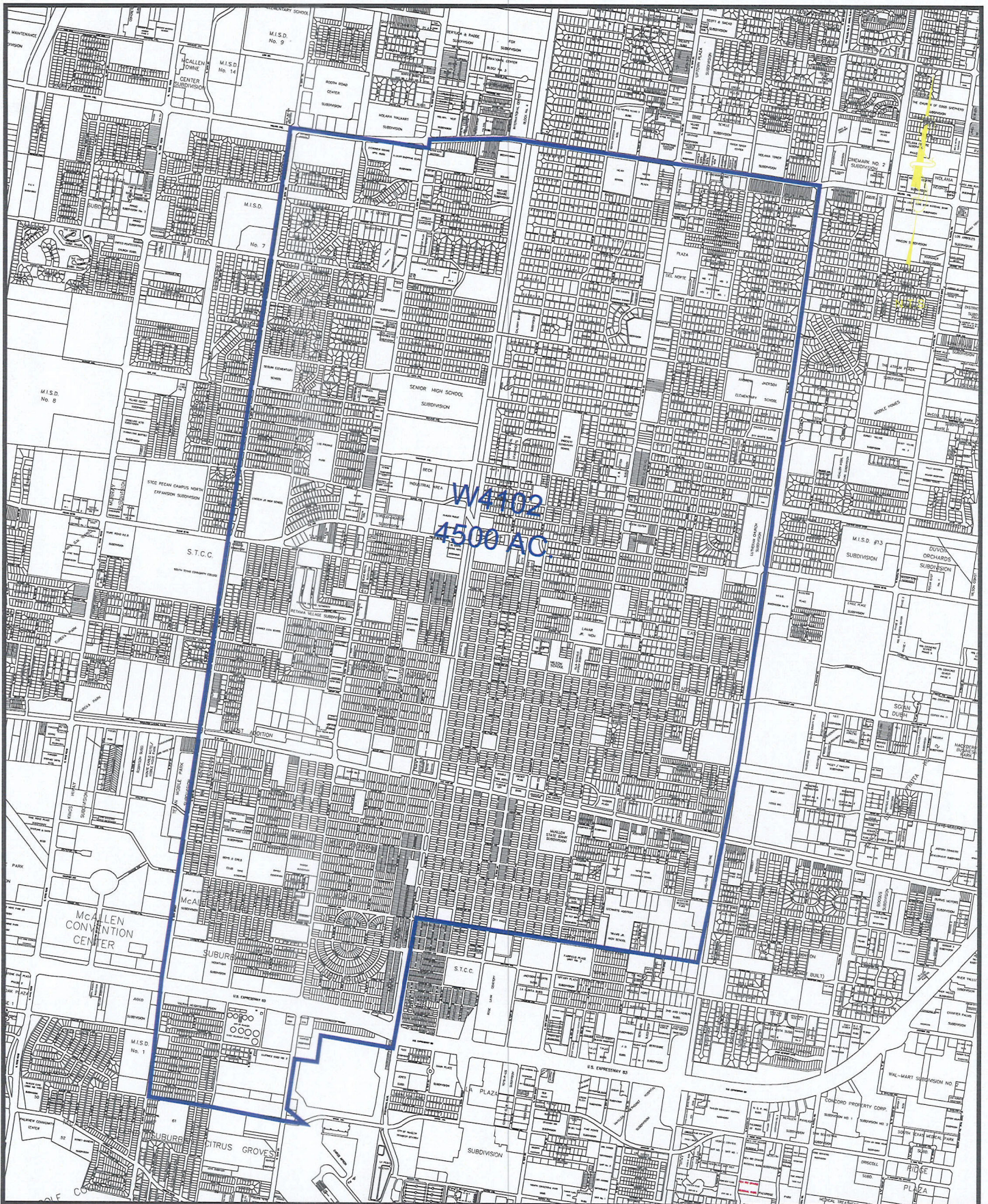
Prepared By: RL Date: 4/14/2023 Reviewed By: _____

Escrows will be adjusted upon execution of Final Reimbursement Certificate

I hereby agree to pay amounts indicated above and any additional costs determined in the Final Reimbursement Certificate as approved by McAllen Public Utility Board.

Signature: _____

Print: _____

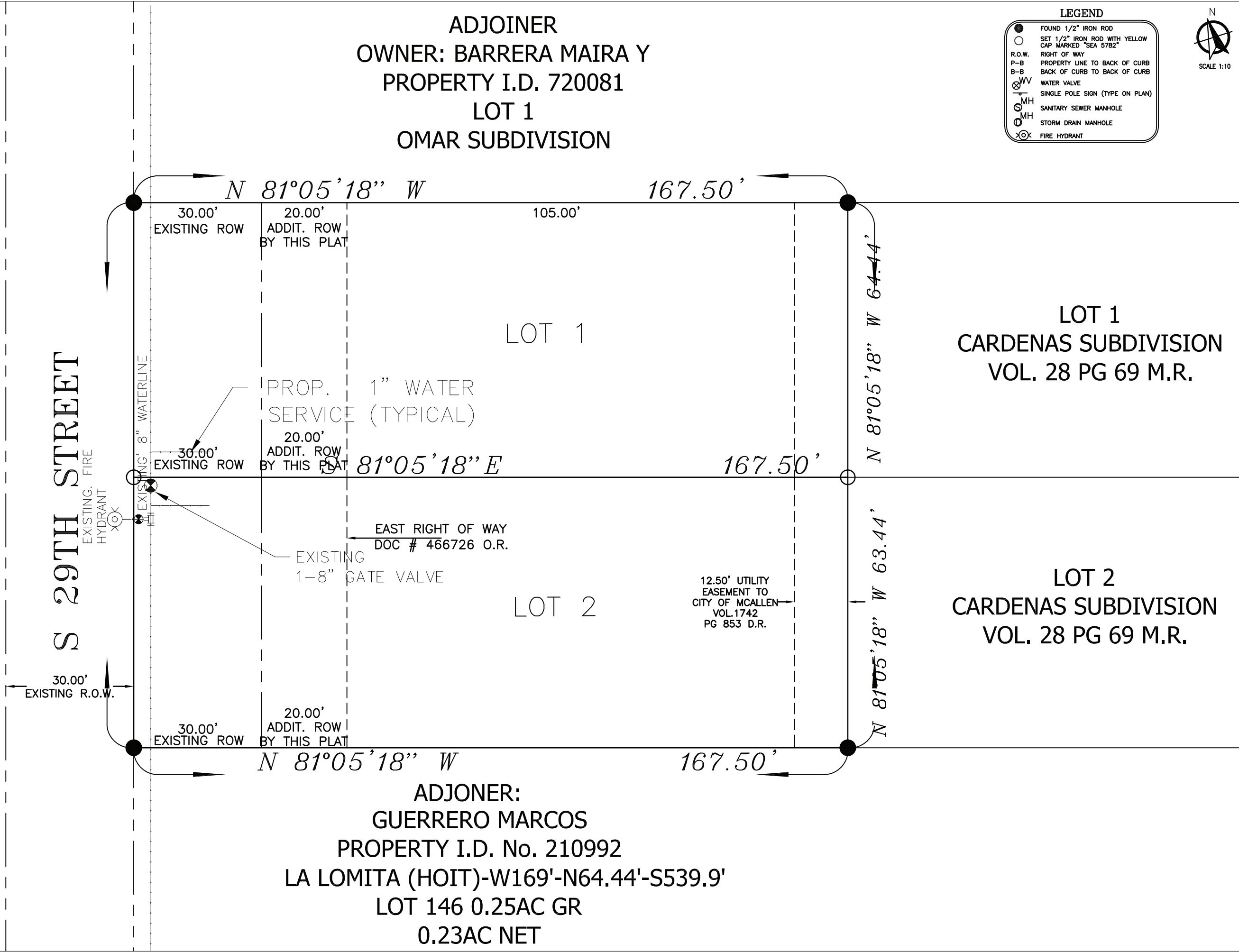


CENTRAL McALLEN DISTRIBUTION MAINS
SERVICE AREA



PH. (956) 537-1311
E-MAIL: MSALINAS6973@ATT.NET

BLOCK 2 AMENDED MAP OF TEXAN MOBILE
PARK SUBD. V. 15 P. 27 M.R.



ADJOINER
OWNER: BARRERA MAIRA Y
PROPERTY I.D. 720081
LOT 1
OMAR SUBDIVISION

LEGEND	
●	FOUND 1/2" IRON ROD
○	SET 1/2" IRON ROD WITH YELLOW CAP MARKED "SEA 5782"
R.O.W.	RIGHT OF WAY
P-B	PROPERTY LINE TO BACK OF CURB
B-B	BACK OF CURB TO BACK OF CURB
⊗	WATER VALVE
⊕	SINGLE POLE SIGN (TYPE ON PLAN)
⊙	SANITARY SEWER MANHOLE
⊙	STORM DRAIN MANHOLE
⊗	FIRE HYDRANT



PROJECT NAME:	VARGAS PATRIMONY SUBDIVISION
ADDRESS:	311 S 29TH ST. MCALLEN, TEXAS 78501
CLIENT INFORMATION:	MIGUEL A. VARGAS

MAS ENGINEERING LLC.
CONSULTING ENGINEERING
FIRM NO. F-15499

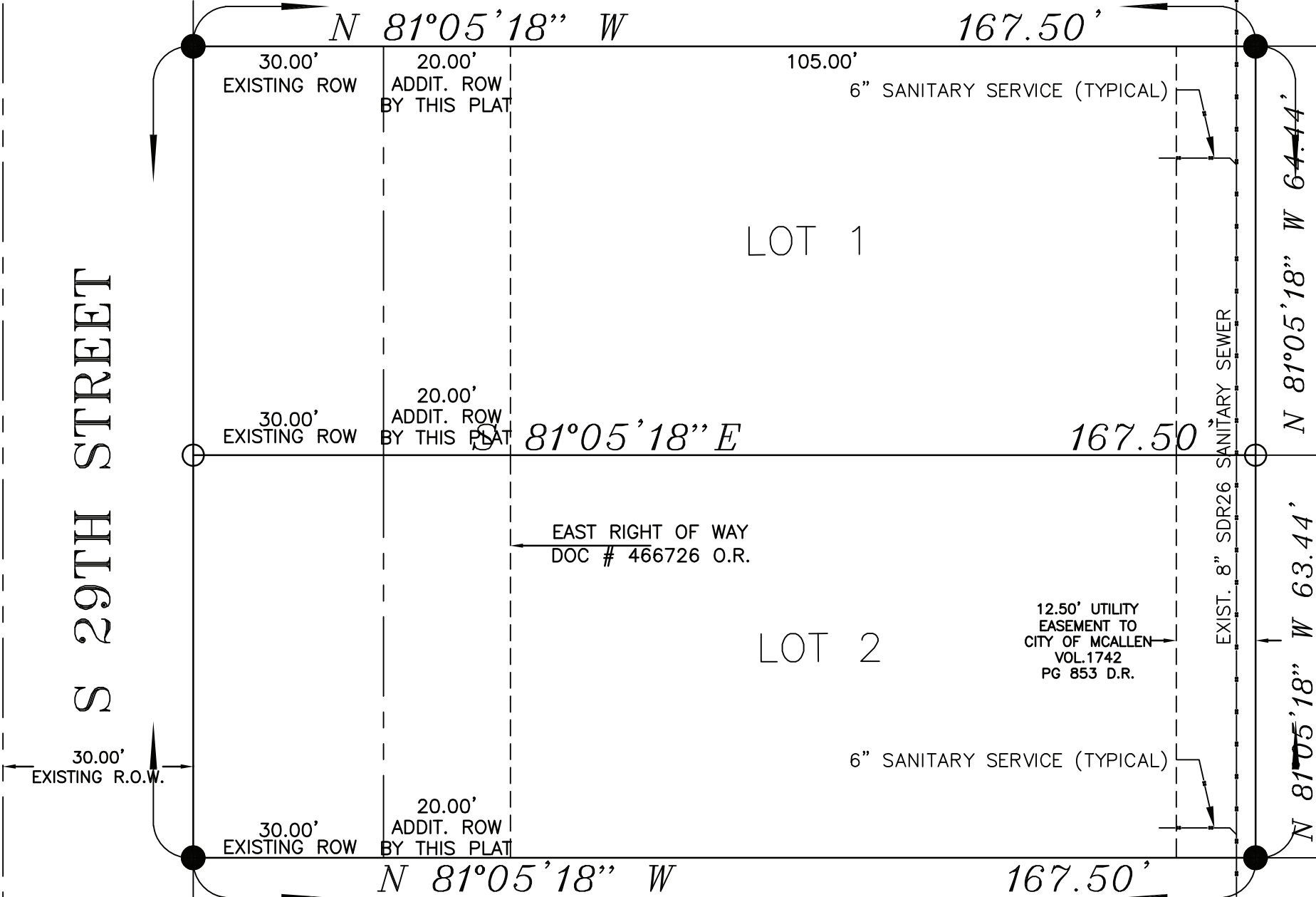
3911 N 10TH STREET, SUITE H
MCALLEN, TEXAS 78501
PH. (956) 537-1311
E-MAIL: MSALINAS6973@ATT.NET

THIS IS THE PROPERTY OF THE PROFESSIONAL ENGINEER WHOSE SEAL APPEARS ON THIS DRAWING AND IT IS UNLAWFUL TO REUSE THIS DRAWING ON ANY OTHER PROJECT OR TO COPY, TRACE OR IN ANY OTHER WAY REPRODUCE ANY OR ALL PARTS OF THIS DRAWING WITHOUT THE WRITTEN CONSENT OF THE ENGINEER.

SHEET NAME: WATER PLAN		
REVISION: 1	BY: JB	APPROVED BY: MAS
DATE OF PREPARATION: 04-07-2023		
PROJECT No. 	SHEET No. C-2	

BLOCK 2 AMENDED MAP OF TEXAN MOBILE
PARK SUBD. V. 15 P. 27 M.R.

S 29TH STREET



ADJOINER
OWNER: BARRERA MAIRA Y
PROPERTY I.D. 720081
LOT 1
OMAR SUBDIVISION

LEGEND

- FOUND 1/2" IRON ROD
- SET 1/2" IRON ROD WITH YELLOW CAP MARKED "SEA 5782"
- R.O.W. RIGHT OF WAY
- P-B PROPERTY LINE TO BACK OF CURB
- B-B BACK OF CURB TO BACK OF CURB
- WV WATER VALVE
- MH SINGLE POLE SIGN (TYPE ON PLAN)
- MH SANITARY SEWER MANHOLE
- MH STORM DRAIN MANHOLE
- ⊗ FIRE HYDRANT



LOT 1
CARDENAS SUBDIVISION
VOL. 28 PG 69 M.R.

LOT 2
CARDENAS SUBDIVISION
VOL. 28 PG 69 M.R.

ADJONER:
GUERRERO MARCOS
PROPERTY I.D. No. 210992
LA LOMITA (HOIT)-W169'-N64.44'-S539.9'
LOT 146 0.25AC GR
0.23AC NET

PROJECT NAME: VARGAS PATRIMONY SUBDIVISION

ADDRESS: 311 S 29TH ST.
MCALLEN, TEXAS 78501

CLIENT INFORMATION: MIGUEL A. VARGAS

MAS ENGINEERING LLC.
CONSULTING ENGINEERING
FIRM NO. F-15499

3911 N 10TH STREET, SUITE H
MCALLEN, TEXAS. 78501

PH. (956) 537-1311
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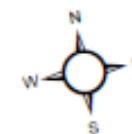
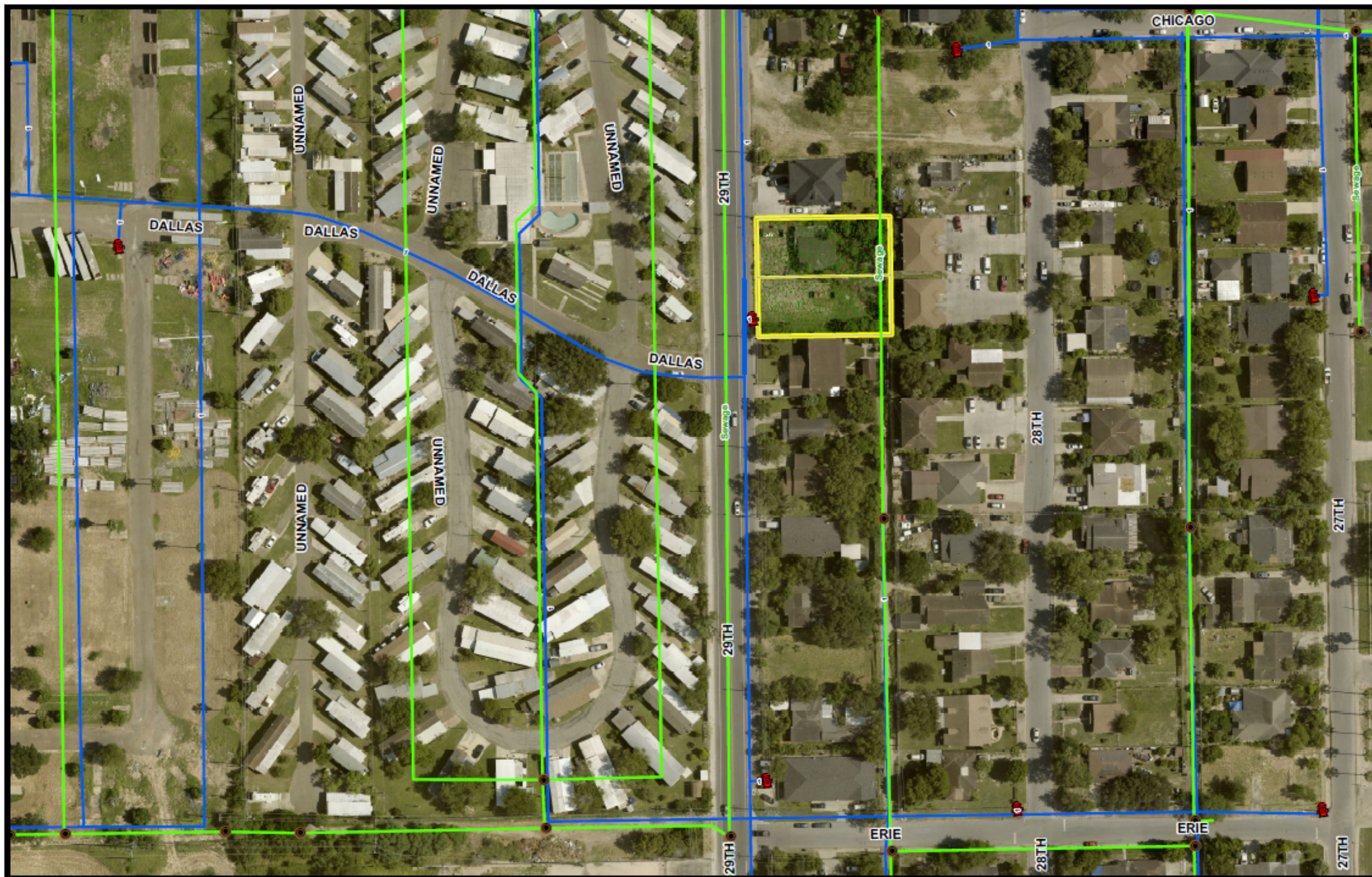
SHEET NAME: SANITARY SEWER PLAN

REVISION: 2 BY: JB APPROVED BY: MAS

DATE OF PREPARATION: 11-11-2022

PROJECT No. SHEET No. C-3

VARGAS PATRIMONY



1 inch = 104 feet

- Legend**
- Proposed Clean-Out
 - Proposed Manholes
 - Proposed Fire Hydrant
 - Existing Fire Hydrants
 - Proposed Force Main
 - Proposed Sewer Line
 - Proposed Water Line
 - Proposed Sewer
- Type of Main**
- Force Main
 - Lots
 - Existing Waterline
 - Proposed Area



AGENDA ITEM

3.a.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/03/2023

MEETING DATE

4/25/2023

1. Agenda Item: Award of Contract for City of McAllen Employee Dental Plan

**2. Party Making Request:
Jolee Perez, Benefits Coordinator**

3. Nature of Request: Award of Contract for City of McAllen Employee Dental Plan

4. Budgeted:

Bid Amount: _____
Under Budget: _____

Budgeted Amount: _____
Over Budget: _____
Amount Remaining: _____

5. Reimbursement:

6. Routing:

Jolee Perez
Jeff Johnston
Melba Carvajal

Created/Initiated - 4/3/2023
Approved - 4/3/2023
Final Approval - 4/3/2023

7. Staff's Recommendation: Staff recommends a three-year award to Delta Dental, effective October 1, 2023._

8. City Attorney: Approve. IJT

9. MPU General Manager: Approved - MAV

10. Director of Finance for Utilities: Approved - MDC



MEMORANDUM

TO: Mark Vega; General Manager of Public Utilities
FROM: Jolee Perez; Director of Employee Benefits
DATE: April 25, 2023
RE: City of McAllen Employee Dental Plan

As part of our ongoing efforts to ensure robust employee benefits while securing the best possible rates, the Employee Benefits Department solicited for informal proposals for the Employee Dental Plan. The current dental plan agreement is set to expire September 30, 2023. This plan is 100% paid for by employees.

Respondents

Lincoln Financial (*incumbent*)
Standard Insurance Company
Ameritas
Humana
Sun Life
BCBSTX

Non-Respondents*

Aetna
Guardian Life
MetLife
United Healthcare
Mutual of Omaha
UNUM

** Due to noncompetitive rates*

While we have experienced both administrative and member satisfaction with our current provider Lincoln, they represent the greatest increase in premiums over all other provider considerations at approximately \$67,000 in increase to employee premiums annually.

Of the top ranked carrier proposals, Delta Dental and Standard Insurance Company offered the most comprehensive and favorable package. However, Standard Insurance Company premiums were less favorable, costing employees minimally about \$23,000 more annually and they did not guarantee a flat rate for year three of the term. Delta Dental mirrored our current plan design, had minimal impact to provider disruption and guaranteed three-year flat rate.

After comparing the plan design, provider disruption, premiums and taking into consideration past experience and references, we recommend a three-year contract award to Delta Dental, effective October 1, 2023.

	Current Monthly Premium	Renewed Monthly Premiums	Change / Month
Employee Only	\$19.86	\$19.91	+\$0.05
Employee Plus Family	\$65.58	\$65.76	+\$0.18

City of McAllen - Dental Insurance Proposals 2023

PLAN BENEFITS / RATES		LFG (CURRENT)	LFG (RENEWAL)	Delta Dental Insurance Company	Standard Insurance Company 1	Standard Insurance Company 2	Ameritas	Humana	Sun Life	BCBSTX
Dental Benefits										
Benefit Payable on Calendar Year or Plan Year	Calendar Year	Calendar Year	Calendar Year	Calendar Year	Calendar Year	Calendar Year	Calendar Year or Plan Year choice	Calendar Year	Calendar Year	Calendar Year
Annual Open Enrollment Included	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Annual Open	Yes
Benefit Waiting Period	No	No	No	No	No	No	No	Orthodontic: 12 months	No	No
Late Entrant Provision	No	No	No	No	No	No	No	No	6 month restorative, 12m Basic, 12 month Major	No
Calendar Year Maximum	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500
Annual Deductible	\$50	\$50	\$50	\$50	\$50	\$50	\$50 lifetime deductible	\$50	50	\$50
Deductible Family Maximum	3	3	3	3	3	3	3	3	3	\$3
Preventative Services - Percent Payable	100%	100%	100%	100%	100%	100%	100%	100%	100	100%
Basic Services - Percent Payable	80%	80%	80%	80%	80%	80%	80%	80%	80	80%
Major Services - Percent Payable	50%	50%	50%	50%	50%	50%	50%	50%	50	50%
Waiting Period for Basic, Major, or Ortho Services	No	No	No	No	No	No	No	Orthodontic: 12 months	No	No
Exams	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventive	Preventative	Preventative
Cleanings/ # of cleanings?	Preventative/ 3 cleanings per yr	Preventative/ 3 cleanings per yr	Preventative/ 3 cleanings per yr	Preventative/ 3 cleanings per yr	Preventative/ 3 cleanings per yr	Preventative/ 3 cleanings per yr	Preventative/ 3 cleanings per yr	Preventive (3 cleanings per year)	Preventative/ 2 per cal year	Preventative/3 cleanings per year
Fluoride	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventive	Preventative	Preventative
Bitewing X-Rays	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventive	Preventative	Preventative
Full Mouth X-Rays	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventive	Preventative	Preventative
Space Maintainers	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventive	Preventative	Preventative
Sealants	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Preventative	Basic	Preventative	Preventative
Amalgam Fillings	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Basic
Composite Fillings	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Basic
Are Composite fillings covered for all teeth?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
Non Surgical Periodontics	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Surgical Periodontics	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Non Surgical Endodontics	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Surgical Endodontics	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Simple Extractions	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Basic	Major
Complex Extractions	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Anesthesia	Basic and Major	Basic and Major	Basic & Major	Basic and Major	Basic and Major	Basic and Major	Basic & Major	Major	Major	Major
Inlays, Onlays, Crowns	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Crown Repair	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Bridges	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Dentures	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Denture Repair	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Implants	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Prosthetics	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Ortho Services										
Ortho Services - Percent Payable	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Ortho Services age limitation	Adult and Child	Adult and Child	Adult and Child	Adult and Child	Adult and Child	Adult and Child	Adult and Child	Adult/Child	Adult and Child	Adult & Child
Ortho Services Lifetime Maximum	\$1,200	\$1,200	\$1,200	\$1,250	\$1,250	\$1,250	\$1,200	\$1,200	\$1,250	\$1,200
Waiting Period										
Waiting Period	None	None	None	None	None	None	None	None	none	None
Late Entrant Provision	12 months	12 months	12 months	12 months	12 months	12 months	12 months	12 months	12 months	12 months
Open Enrollment	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	yes	Yes
Monthly Rates										
Employee Only	\$19.86	\$21.80	\$19.91	\$20.58	\$21.20	\$21.20	\$22.04	\$21.23	\$21.57	\$19.32
Employee + Family	\$65.58	\$72.19	\$65.76	\$67.98	\$70.02	\$70.02	\$70.84	\$70.13	\$71.26	\$63.81
Rate Guarantee Period	24 Months	24 Months	36 months	24 months w/ 3rd year cap @ 5%, EE \$21.60 & FAM \$71.38	36 months	36 months	24 months, with 5% cap 3rd & 4th year rates of EE \$23.14 & FAM \$74.38	36 Months	24 months	24 months, 6% rate cap year 3 EE \$20.48, FAM \$67.64
Monthly Premium										
Employee Only Enrolled	789	\$15,669.54	\$17,200.20	\$15,708.99	\$16,237.62	\$16,726.80	\$ 17,389.56	\$16,750.47	\$17,018.73	\$15,243.48
Employee + Family Enrolled	611	\$40,069.38	\$44,108.09	\$40,179.36	\$41,535.78	\$42,782.22	\$ 43,283.24	\$42,849.43	\$ 43,539.86	\$38,987.91
Total Monthly Premium		\$55,738.92	\$61,308.29	\$55,888.35	\$57,773.40	\$59,509.02	\$ 60,672.80	\$59,599.90	\$60,558.59	\$54,231.39
1st year Annual Premium		\$668,867.04	\$735,699.48	\$670,660.20	\$693,280.80	\$714,108.24	\$ 728,073.60	\$715,198.80	\$ 726,703.08	\$650,776.68
2nd year Annual Premium		\$668,867.04	\$735,699.48	\$670,660.20	\$693,280.80	\$714,108.24	\$ 728,073.60	\$715,198.80	\$ 726,703.08	\$650,776.68
3rd year Annual Premium				\$670,660.20	\$727,866.96	\$714,108.24	\$ 764,443.68	\$715,198.80		\$689,841.12
Differential to Current Annual Premium			\$66,832.44	\$1,793.16	\$24,413.76	\$45,241.20	\$ 59,206.56	\$46,331.76	\$ 57,836.04	(\$18,090.36)
Additional Services/ Notes										
			1. No Balance Billing for members for PPO & Premier 2. Diagnostic & Preventative Waiver- does not apply to plan maximum benefit in lieu of Dental Rewards. 3. Instead of D&P Waiver, Dental Rewards can be included- matching benefits. Will be able to transfer reward dollars. 4. Cost Estimator tool & Teledentistry tools w/ Virtual	Ortho Reset & Max Builder included	Ortho Reset	Dental Rewards: Members will maintain their earned rewards and there is a unlimited maximum carryover. There is no max rollover. Single Lifetime Deductible		Preventative Services do not apply to plan maximum		
		Implementation Credit: \$2500 per plan year (total \$5k)	Implementation Credit: \$15,000 (\$5,000 per plan year)	Implementation Credit: \$15,000 one-time	Implementation Credit: \$15,000 one-time	Implementation Credit: \$10,0000 one-time or \$2500 per year up to \$10k		Implementation Credit: Will pay fees up to 1% of annual premium. (\$7,267 one-time payment)	Implementation Credit: \$15,000 (\$5,000 annually)	
				3rd year Annual difference from 1st & 2nd year: \$34,586.16		3rd & 4th year difference from 1st & 2nd year: \$36,370.08			3rd year difference from 1st & 2nd year: \$39,064.44	

City of McAllen

TOP DENTAL PROVIDERS (\$5K+ CLAIMS)

Group ID	TIN	Dent Network	Provider Last Name	Provider First Name	Address 1	City	Members Using	Claims Submitted	Paid Amt	Charge Amt	Covered Amt	LFG (CURRENT)	Delta Dental PPO™	Delta Dental Premier®	Standard Insurance Company	Ameritas	Humana	Sun Life Dental Network	BCBSTX
CTYMCALL2	461660748	In-Network	TAN	JOHN	2200 TRENTON RD	MCALLEN	124	259	\$43,440.19	\$78,614.76	\$65,748.68	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	823708598	In-Network	MEZA	JOSE	312 PECAN BLVD	MCALLEN	26	128	\$21,940.40	\$39,299.00	\$31,690.45	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	830555242	In-Network	BAEK	JOON	228 N WARE RD	MCALLEN	46	96	\$19,931.01	\$31,209.72	\$27,200.87	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	472522995	In-Network	GRAY	DAVID	4336 N MCCOLL RD	MCALLEN	35	119	\$16,508.90	\$30,321.00	\$24,075.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	814176384	In-Network	GONZALEZ	DAVID	1104 W SAM HOUSTON BLVD	PHARR	26	78	\$10,800.10	\$35,714.00	\$15,649.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	820943400	In-Network	SMITH IV	ANDREW	308 S BRYAN RD	MISSION	23	86	\$10,120.10	\$24,448.00	\$13,915.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	810884374	In-Network	OCHOA	JOSE	3724 PECAN BLVD STE 2	MCALLEN	12	65	\$10,052.60	\$32,131.00	\$13,945.00	YES	YES	YES	YES	YES	YES	YES	NO
CTYMCALL2	463926611	In-Network	CHAVEZ	MARITZA	4500 N 10TH ST	MCALLEN	12	67	\$9,665.00	\$32,911.00	\$12,479.00	YES	YES	YES	YES	YES	YES	YES	NO
CTYMCALL2	2611333782	In-Network	SALINAS	ROCKY	3001 N 23RD ST	MCALLEN	22	94	\$9,489.05	\$43,768.00	\$13,984.74	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	821576788	In-Network	LOPEZ	ROXANA	4501 W EXPRESSWAY 83	MCALLEN	15	53	\$9,365.70	\$29,025.00	\$12,048.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	300520192	In-Network	MORALES	ESTEBAN	820 W NOLANA AVE STE A	MCALLEN	26	74	\$9,195.80	\$36,966.00	\$13,319.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	853695482	In-Network	ANTOLIN	JED RYAN	2019 W NOLANA AVE	MCALLEN	13	42	\$9,180.60	\$32,133.06	\$11,360.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	462997827	In-Network	VELA	DEYANIRA	281 E TRENTON RD	EDINBURG	11	74	\$8,789.35	\$19,099.76	\$11,479.57	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	270929726	In-Network	PEREZ	FRANCISCO	4728 S JACKSON RD	EDINBURG	17	30	\$8,749.67	\$33,572.01	\$18,059.25	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	273940257	In-Network	VASQUEZ	RICARDO	4853 S JACKSON RD	EDINBURG	9	64	\$8,442.57	\$15,588.00	\$9,992.74	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	208486449	In-Network	MOHAMED	CARLOS	6800 N 10TH ST	MCALLEN	24	66	\$8,134.90	\$15,704.00	\$10,237.00	YES	NO	NO	YES	YES	YES	YES	YES
CTYMCALL2	742923008	Out of Network	RODRIGUEZ DDS	RICARDO	409 N 10TH ST	MCALLEN	31	73	\$7,490.20	\$11,839.00	\$9,761.00	NO	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	842945720	In-Network	RODRIGUEZ	ALVARO	3400 N MCCOLL RD	MCALLEN	20	32	\$7,316.78	\$46,010.00	\$17,442.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	272082576	In-Network	TAYLOR	DAVID	1400 E EXPRESSWAY 83	MCALLEN	15	56	\$7,148.28	\$21,221.48	\$14,985.75	YES	NO	YES	NO	NO	YES	YES	YES
CTYMCALL2	844343925	Out of Network	TIJERINA	LAURO	4121 NORTH 22ND ST	MCALLEN	19	65	\$6,790.20	\$25,796.00	\$10,874.00	NO	NO	NO	NO	NO	NO	NO	NO
CTYMCALL2	201352135	In-Network	DE LA GARZA	JAVIER	461 N WESTGATE DR	WESLACO	26	63	\$6,690.20	\$28,845.60	\$11,681.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	742943111	In-Network	GARCIA	RICARDO	1608 N 8TH ST	MCALLEN	9	49	\$6,630.22	\$13,521.59	\$13,521.59	YES	YES	YES	NO	YES	NO	YES	YES
CTYMCALL2	352465994	In-Network	CHU	VIOLETTA	117 E GRIFFIN PKWY	MISSION	14	36	\$6,373.40	\$11,540.01	\$7,889.60	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	462283550	In-Network	GARCIA	DAMIEN	800 E DOVE AVE	MCALLEN	12	47	\$6,209.90	\$19,501.00	\$8,520.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	853709881	In-Network	MORALES	ESTEBAN	820 W NOLANA AVE STE A	MCALLEN	16	51	\$6,097.20	\$19,012.00	\$8,879.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	474820181	In-Network	MUNOZ	RICARDO	8001 N 10TH ST STE 150	MCALLEN	10	26	\$5,774.84	\$12,572.00	\$9,970.40	YES	NO	NO	NO	YES	YES	YES	YES
CTYMCALL2	815166263	In-Network	GARCIA	JOHN	4502 S MCCOLL RD	EDINBURG	11	41	\$5,118.30	\$17,048.00	\$7,058.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	742943601	In-Network	CAZARES	JOSE	1632 N 10TH ST	MCALLEN	24	82	\$4,999.39	\$49,589.19	\$22,009.38	YES	NO	YES	YES	YES	YES	YES	YES
CTYMCALL2	2611333782	In-Network	SALINAS	ROCKY	805 N CAGE BLVD	PHARR	14	42	\$4,830.16	\$18,269.56	\$6,620.39	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	273126199	In-Network	CRUZ	CARLOS	2405 CORNERSTONE BLVD	EDINBURG	19	30	\$4,822.40	\$17,890.00	\$9,183.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	462016923	In-Network	HING	KYLE	1560 E CANTON RD STE G	EDINBURG	18	30	\$4,453.40	\$10,229.00	\$5,717.60	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	471875605	In-Network	DOLEYRES	DORIS	1905 E MONTE CRISTO RD	EDINBURG	13	27	\$4,340.70	\$5,834.00	\$5,360.00	YES	NO	YES	YES	YES	YES	YES	YES
CTYMCALL2	742923008	Out of Network	RODRIGUEZ	RICARDO	409 N. 10TH ST	MCALLEN	27	45	\$4,220.80	\$6,756.00	\$5,415.00	NO	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	742943383	In-Network	BURKETT	JASON	6900 N 10TH STREET	MCALLEN	10	34	\$4,210.49	\$12,845.00	\$6,215.87	YES	YES	YES	YES	YES	YES	NO	YES
CTYMCALL2	824181626	In-Network	CHAPA	ANACRISTINA	1123 S 10TH AVE	EDINBURG	10	20	\$4,110.60	\$29,994.00	\$10,104.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	461003418	In-Network	GUI TO	NICOLE	2708 W NOLANA AVE STE 120	MCALLEN	18	31	\$4,070.01	\$10,698.00	\$5,297.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	822988400	In-Network	PARK	CHAN MIN	930 E EXPRESSWAY 83	MCALLEN	9	23	\$4,064.56	\$9,369.00	\$6,350.36	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	208486449	Out of Network	GUTIERREZ	LETICIA	6800 N 10TH ST	MCALLEN	18	43	\$4,022.60	\$7,579.00	\$4,315.00	NO	NO	NO	NO	NO	YES	YES	YES
CTYMCALL2	452885555	In-Network	AST	BRIAN	1300 S CAGE BLVD STE K	PHARR	10	24	\$3,986.61	\$9,600.53	\$5,196.38	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	832128764	In-Network	COBAN	ALPER	2702 CORNERSTONE BLVD	EDINBURG	11	22	\$3,851.70	\$8,369.00	\$4,343.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	208486449	Out of Network	BECERRA	MARIA PATR	6800 N 10TH ST	MCALLEN	12	23	\$3,809.40	\$9,121.00	\$4,486.00	NO	NO	NO	NO	NO	YES	YES	YES
CTYMCALL2	822651335	In-Network	GULATI	ASHWIN	228 E MILE 3 RD UNIT 101	PALMHURST	9	20	\$3,807.90	\$10,035.00	\$5,103.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	462016923	In-Network	MOROZUMI	MARK	1560 E CANTON RD STE G	EDINBURG	11	22	\$3,768.20	\$8,163.25	\$5,024.00	YES	YES	YES	YES	YES	YES	YES	YES
CTYMCALL2	824459246	In-Network	VERAY	GILBERTO	4229 W EXPRESSWAY 83	MCALLEN	14	43	\$3,767.10	\$11,106.00	\$5,067.00	YES	YES	YES	YES	YES	YES	YES	YES

Top 35 Providers (\$5k+ Claims)	LFG	Delta Premier	Standard	Ameritas	Humana	Sun Life	BCBS
Out of Network Dentists	5	5	6	4	2	2	3
Out of Network Claims	249	223	262	187	114	29	197
Out of Network Members	107	83	83	64	28	99	43
Out of Network Paid Benefit	\$26,333	\$28,531.94	\$34,175.54	\$21,770.48	\$13,420.42	\$11,000.69	\$26,508



AGENDA ITEM

3.b.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/03/2023

MEETING DATE

4/25/2023

1. Agenda Item: Award of Contract for City of McAllen Employee Vision Plan

**2. Party Making Request:
Jolee Perez, Benefits Coordinator**

3. Nature of Request: Award of Contract for City of McAllen Employee Vision Plan

4. Budgeted:

Bid Amount: _____
Under Budget: _____

Budgeted Amount: _____
Over Budget: _____
Amount Remaining: _____

5. Reimbursement:

6. Routing:
Jolee Perez **Created/Initiated - 4/3/2023**
Jeff Johnston **Approved - 4/3/2023**
Melba Carvajal **Final Approval - 4/3/2023**

7. Staff's Recommendation: Staff recommends award of contract for City of McAllen Employee Vision Plan to the incumbent, Davis Vision, for a five-year term effective October 1, 2023.

8. City Attorney: Approve. IJT

9. MPU General Manager: Approved - MAV

10. Director of Finance for Utilities: Approved - MDC



MEMORANDUM

TO: Mark Vega; General Manager Public Utilities
FROM: Jolee Perez; Director of Employee Benefits
DATE: April 25, 2023
RE: City of McAllen Employee Vision Plan

As part of our ongoing efforts to ensure robust employee benefits while securing the best possible rates, the Employee Benefits Department solicited for informal proposals for the Employee Vision Plan. The current vision plan agreement is set to expire September 30, 2023. This plan is 100% paid for by employees.

Respondents

Davis Vision (incumbent)
Humana
BCBSTX
Sun Life

Non-Respondents*

Ameritas
Eyetopia
Aetna
Guardian Life
UNUM
Standard Insurance Company
United Healthcare

** Due to noncompetitive rates*

Of the four respondents, only two had premium reductions (Davis Vision & BCBSTX) while the other two increased premiums resulting in anywhere from \$8200 to \$18,000 in increased premiums annually.

Of the two top respondents, Davis Vision & BCBSTX, Davis Vision still offered the better overall package including the enhanced allowance capability, benefit reset at plan year start date, no provider impact and a five year rate guarantee.

After comparing the plan design, provider disruption, premiums and taking into consideration past experience and references, we recommend a five-year contract award to Davis Vision, effective October 1, 2023.

	Current Monthly Premium	Renewed Monthly Premiums	Change / Month
Employee Only	\$10.60	\$10.40	-\$0.20
Employee Plus Family	\$26.56	\$26.04	-\$0.52

Davis Vision (Current)		DAVIS VISION		HUMANA		BCBS		SUN LIFE											
MONTHLY RATES		MONTHLY RATES		MONTHLY RATES		MONTHLY RATES		MONTHLY RATES											
EMPLOYEE ONLY	\$10.60	EMPLOYEE ONLY	637 EEs Enrolled	\$10.40	EMPLOYEE ONLY	\$11.37	EMPLOYEE ONLY	\$10.13	EMPLOYEE ONLY	10.95									
EMPLOYEE FAMILY	\$26.56	EMPLOYEE + FAMILY	537 EEs Enrolled	\$26.04	EMPLOYEE + FAMILY	\$28.46	EMPLOYEE + FAMILY	\$25.36	EMPLOYEE + FAMILY	27.42									
Monthly Premium	\$21,014.92	Monthly Premium		\$20,608.28	Monthly Premium	\$22,525.71	Monthly Premium	\$20,071.13	Monthly Premium	\$21,699.69									
Annual Premium	\$252,179.04	Annual Premium		\$247,299.36	Annual Premium	\$270,308.52	Annual Premium	\$240,853.56	Annual Premium	\$260,396.28									
		Differential to Current		(\$4,879.68)	Differential to Current	\$18,129.48	Differential to Current	(\$11,325.48)	Differential to Current	\$8,217.24									
Implementation Credit:	\$1,200	Implementation Credit:		\$1200 per plan year	Implementation Credit:	\$2500 for combined dental & vision	Implementation Credit:	\$0	Implementation Credit:	Less than 1% OF Premium to be paid to enrollment vendor									
Rate Guarantee	4	Rate Guarantee		5	Rate Guarantee	3	Rate Guarantee	4	Rate Guarantee	3									
VOLUNTARY VISION PLAN		PLAN BENEFITS		PLAN BENEFITS		PLAN BENEFITS		PLAN BENEFITS											
VISION BENEFITS		IN-NETWORK MEMBER COST		OUT-OF-NETWORK MEMBER COST		IN-NETWORK MEMBER COST		OUT-OF-NETWORK MEMBER COST		IN-NETWORK MEMBER COST		OUT-OF-NETWORK MEMBER COST							
VISION EXAMINATION		\$10 copay		up to \$40 reimbursement		\$10		Up to \$30		\$10 copay		up to \$40 reimbursement		\$10	\$45 allowance				
CONTACT LENS FIT & FOLLOW-UP		Collection: \$10 copay, then covered in full Non-Collection: \$10 copay + \$60 allowance + 15% savings		Applied to the allowance for contact lenses				up to \$40 reimbursment for Standard/ 10% off retail price for premium		not applicable		\$60		\$105 allowance \$210 for medically necessary					
STANDARD CONTACT LENS FITTING				\$0		Up to \$30		up to \$40 reimbursment		not applicable									
CUSTOM CONTACT LENS FITTING				10% off retail less \$55 allowance		Up to \$30		10% off retail for premium		not applicable									
MATERIALS COPAY		\$10 lens copay, then covered in full for single vision, lined bifocals, lined trifocals, and lenticular lenses. No Copay for Frames; Frames from the Davis Vision Exclusive Collection, Covered in Full / Non-Collection: See below		up to \$40 lenses reimbursement up to \$70 frames reimbursement				see lens options in proposal		Varies based on material		\$10		\$10					
FRAME ALLOWANCE		Exclusive Collection: Covered in Full, all tiers - Designer, Fashion, Premier / \$175 other locations / Visionworks: \$225 + 20% off any overage		up to \$70 reimbursement		\$175 allowance 20% off balance over \$175		\$80 allowance		\$0 Copay/\$175 Allowance/20% off balance over \$175		Up to \$70		\$170		\$70 allowance			
LENSES BENEFITS		IN-NETWORK MEMBER COST		EYEWEAR COLLECTION MEMBER COST		OUT-OF-NETWORK MEMBER COST		IN-NETWORK MEMBER COST		EYEWEAR COLLECTION MEMBER COST		OUT-OF-NETWORK MEMBER COST		IN-NETWORK MEMBER COST		EYEWEAR COLLECTION MEMBER COST		OUT-OF-NETWORK MEMBER COST	
STANDARD SPECTACLE LENSES (Per Pair)																			
Single Vision		\$10 copay		up to \$40 reimbursement		\$10		Up to \$25		\$10 copay		up to \$40 reimbursement						\$30 allowance	
Bifocal		\$10 copay		up to \$60 reimbursement		\$10		up to \$40		\$10 copay		up to \$60 reimbursement						\$50 allowance	
Trifocal		\$10 copay		up to \$80 reimbursement		\$10		Up to \$60		\$10 copay		up to \$80 reimbursement						\$60 allowance	
Lenticular		\$10 copay		up to \$100 reimbursement		\$10		Up to \$100		\$10 copay		up to \$100 reimbursement						\$100 allowance	
Progressive		\$50 Standard / \$90 Premium / \$140 Ultra		up to \$60 reimbursement		\$10		Up to \$40		Standard is \$75 copay		up to \$60 reimbursement							
STANDARD POLYCARBONATE SINGLE VISION/MULTI-FOCAL		\$30 adults		\$0 for children		Applied to the allowance for the applicable corrective lens		\$40		Not Covered		\$40 for adults. Covered for kids under 19		N/A for adults. Up to \$20 reimbursment for kids under 19.		\$35			
STANDARD SCRATCH RESISTANT COATING		\$0 Standard		Premium: \$30 Scratch Protection Plan - Single Vision: \$20 / Multifocal: \$40		Applied to the allowance for the applicable corrective lens		\$15		Not Covered		Covered		Up to \$8 reimbursement		\$17			
ULTRA-VIOLET COATING		\$12		Applied to the allowance for the applicable corrective lens		\$15		Not Covered		\$15		N/A		\$10-\$16					
STANDARD ANTI-REFLECTIVE COATING		\$35 Standard / \$48 Premium / \$60 Ultra / \$85 Ultimate		Applied to the allowance for the applicable corrective lens		\$10		Up to \$25		\$45		N/A		\$41-\$85					
SOLID PLASTIC OR GRADIENT TINTS/DYES		\$0		Applied to the allowance for the applicable corrective lens		\$15		Not Covered		Covered		Up to \$8 reimbursment		\$15-\$17					
PHOTOCHROMATIC LENSES (Glass & Plastic)		\$65 plastic only		Applied to the allowance for the applicable corrective lens		\$75		Not Covered		\$75		N/A		\$41-\$82					
LEVEL 1 PROGRESSIVE LENSES		\$50 Standard		Applied to the allowance for the applicable corrective lens		\$45		Up to \$40		See proposal		up to \$60 reimbursement							
LEVEL 2 PROGRESSIVES		\$90 Premium		Applied to the allowance for the applicable corrective lens		\$55		Up to \$40		See proposal		up to \$60 reimbursement							
ALL OTHER PROGRESSIVES		\$140 Ultra / \$175 Ultimate		Applied to the allowance for the applicable corrective lens		\$70 Tier 3, \$25 copay, 80% of charge less \$120 Tier 4		Up to \$40		See proposal		up to \$60 reimbursement		\$55-\$175					
TRANSITIONS -SINGLE VISION/MULTI-FOCAL		\$65		Applied to the allowance for the applicable corrective lens		\$75		Not Covered		Up to \$75 reimbursement		N/A		\$82					
POLARIZED		\$75		Applied to the allowance for the applicable corrective lens		80% of charge		Not Covered		20% off retail price		N/A							
PGX/PBX		Glass lenses not covered		Glass lenses not covered		Not Covered		Not Covered		Refer to proposal		Refer to proposal							
CONTACT LENSES																			
ELECTIVE		Davis Vision Collection Contacts: Covered in Full or Retail Allowance: \$200 + 15% off any overage. The allowance will be applied to one contact lenses purchase. If part of the allowance remains after the first occurrence in a service interval, the remainder will be applied in later contact lens purchases in the same service interval		\$105 reimbursement Contact lenses are provided in place of lens and frame benefits available herein		\$200 allowance		\$128 allowance		\$0 copay/\$200 Allowance/15% off balance over \$200		Up to \$105 reimbursement						\$105 allowance	
MEDICALLY NECESSARY		Covered in full, prior approval required; Necessary contact lenses are a Plan Benefit when specific benefit criteria are satisfied and when prescribed by the Covered Person's In-Network Vision Provider. Contact lenses are provided in place of lens and frame benefits available herein		Up to \$225 reimbursement, prior approval required; Necessary contact lenses are a Plan Benefit when specific benefit criteria are satisfied and when prescribed by the Covered Person's Out-of-Network Vision Provider. Contact lenses are provided in place of lens and frame benefits available herein		\$0		\$210 allowance		Paid in Full		Up to \$225 reimbursement						\$210 for medically necessary	
FREQUENCY																			
EXAM, FRAMES & LENSES		every 12 months, once per plan year		every 12 months, once per plan year		12		12		12		12		12		12		12	

City of McAllen - Vision Top Providers Ranked by Claim Dollar

Report Period: 10/01/2021 to 11/30/2022								Davis Vision	Humana	BCBS	Sun Life
Rank	Full Name	DBA Name	Pay Name	Street	City	Zip	Claim Count	In-Network Y/N	In-Network Y/N	In-Network Y/N	In-Network Y/N
1	Visionworks	Visionworks	EyeMasters Inc	810 E Expressway 83	McAllen	78503	210	Yes	No	No	Yes
2	Crystal Clear Optometry		Antonio Ramirez	4013 N 23rd St Ste B	McAllen	78504	173	Yes	Yes	Yes	Yes
3	Visionworks	Visionworks	EyeMasters Inc	4000 N 10th St Ste D	McAllen	78504	149	Yes	No	No	Yes
4	Dr Steven K Fertig OD	Visionworks	Steven Fertig OD	810 E Expressway 83 Ste B	McAllen	78503	312	Yes	No	No	Yes
5	Dr Landon L Liska, OD		Landon L Liska Enterprises PC	5801 N 10th St Ste 200	McAllen	78504	90	Yes	Yes	Yes	Yes
6	America's Best Contacts & Eyeglasses		National Vision Inc	7600 N 10th St Ste 600G	McAllen	78504	60	Yes	Yes	Yes	No
7	Eye Mart Express		Eyemart Express LLC	506 E Expressway 83	McAllen	78503	64	Yes	Yes	No	No
8	Dr Marina Villalobos	Bella Vista Eye Care, PLLC	Bella Vista Eye Care, PLLC	1001 E Ferguson St	Pharr	78577	52	Yes	Yes	Yes	Yes
9	Hammond Vision Center	Hammond Vision Center	Medina Vision Care PLLC	505 S Broadway St	McAllen	78501	59	Yes	Yes	Yes	Yes
10	Optical Illusion		Love 4 Eyes PLLC	423 W Nolana Ave	McAllen	78504	68	Yes	Yes	Yes	Yes
11	Costco Wholesale Optical		Costco Wholesale Corporation	1501 W Kelly Ave	Pharr	78577	38	Yes	No	Yes	Yes
12	America's Best Contacts & Eyeglasses		National Vision Inc	2515 E Interstate Highway 2 Ste 300	Mission	78572	38	Yes	Yes	No	No
13	Shah Eye Center, PA	Shah Eye Center, PA	Pankaj Shah G MD	1506 E Griffin Pkwy	Mission	78572	48	Yes	Yes	Yes	Yes
14	Walmart Vision Center		Wal-Mart Stores Texas LLC	1724 W University Dr	Edinburg	78539	32	Yes	No	Yes	Yes
15	Walmart Vision Center		Wal-Mart Stores Texas LLC	2800 W Nolana Ave	McAllen	78504	30	Yes	No	Yes	Yes
16	Thurmond Eye Associates		Thurmond Eye Associates PA	222 E Ridge Rd Ste 110	McAllen	78503	37	Yes	Yes	Yes	Yes
17	Cristina Ocampo, OD PLLC	Eyemart Express	Cristina Ocampo OD PLLC	506 E Expressway 83 Ste B	McAllen	78503	70	Yes	Yes	Yes	No
18	Roberto Olivarez Jr Optometrist		Roberto Olivarez Jr	6900 N 10th St Ste 5	McAllen	78504	27	Yes	Yes	Yes	Yes
19	Dr Juan E Cerda	Ridge Eye Clinic Optical	Ridge Eye Clinic	1313 S Cage Blvd	Pharr	78577	17	Yes	Yes	Yes	Yes
20	Thurmond Eye Associates		Thurmond Eye Associates PA	4143 Crosspoint Blvd	Edinburg	78539	32	Yes	Yes	Yes	Yes
21	Visionworks	Visionworks	EyeMasters Inc	601 E Expressway 83 Ste 100	Weslaco	78599	17	Yes	No	No	Yes
22	Dr Dennis M Chang, OD		Dennis M. Chang, OD	601 E Expressway 83 Ste 100B	Weslaco	78599	29	Yes	No	No	Yes
23	Ronald Richardson OD	Visionworks	Ronald Richardson	4000 N 10th St Ste D	McAllen	78504	67	No	Yes	Yes	Yes
24	Hammond Vision Center		Medina Vision Care PLLC	2506 E Richardson Rd	Edinburg	78542	19	Yes	Yes	Yes	Yes
25	My Eyelab		Daniel & Max LLC	614 E Expressway 83 Ste 110	McAllen	78503	18	Yes	No	No	No



AGENDA ITEM

3.c.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/03/2023

MEETING DATE

4/25/2023

1. Agenda Item: Award of Contract for City of McAllen Employee Basic Life, Voluntary Life and Disability Plans
2. Party Making Request:
Jolee Perez, Benefits Coordinator
3. Nature of Request: Award of Contract for City of McAllen Employee Basic Life, Voluntary Life and Disability Plans
4. Budgeted:

Bid Amount:		Budgeted Amount:	
Under Budget:		Over Budget:	
		Amount Remaining:	
5. Reimbursement:
6. Routing:

Jolee Perez	Created/Initiated - 4/3/2023
Jeff Johnston	Approved - 4/3/2023
Melba Carvajal	Final Approval - 4/3/2023
7. Staff's Recommendation: Staff recommends award of contract to the incumbent, Lincoln Financial, for a three-year term effective October 1, 2023.
8. City Attorney: Approve. IJT
9. MPU General Manager: Approved - MAV
10. Director of Finance for Utilities: Approved - MDC



MEMORANDUM

TO: Mark Vega; General Manager of Public Utilities
FROM: Jolee Perez; Director of Employee Benefits
DATE: April 25, 2023
RE: City of McAllen Employee Basic Life, Voluntary Life and Disability Plans

As part of our ongoing efforts to ensure robust employee benefits while securing the best possible rates, the Employee Benefits Department solicited for informal proposals for the Basic Life, Voluntary Life and Disability plans. The current agreement is set to expire September 30, 2023.

The Basic Life Insurance Plan is paid for by the City of McAllen.

The Voluntary Life Insurance Plan and the Disability Plans are paid for 100% by the employees.

Respondents

Lincoln Financial (*incumbent*)
One America
Sun Life
BCBSTX

Non-Respondents*

Securian Financial
Guardian Life
MetLife
United Healthcare
Mutual of Omaha
UNUM
Standard Insurance Company

** Due to noncompetitive rates*

The City of McAllen utilization of the life and disability plans has been very high over the past two years. As a result, we saw many carriers as non-respondents in trying to remain competitive for consideration. Therefore, we only had four respondents. Both Lincoln and OneAmerica held our basic life rate at current factor, while Sun Life and BCBSTX increased that rate extensively, hindering their ability to remain competitive.

OneAmerica is currently projected across employee paid products to be about \$216 lower monthly than Lincoln Financial. However, the City of McAllen does not have prior experience with OneAmerica and there are many unknowns in considering them for a transition, including things such as ease of EDI transmission, claims processing/customer service satisfaction and administrative portal/billing efficiency which impacts labor costs.

Our current vendor, Lincoln Financial is not only established, but has remained satisfactory in both administrative and customer service functions. Additionally, given the very low differential in premiums, one small shift in enrollment numbers could favor Lincoln over OneAmerica at any point. Therefore, we do not believe given the City's volume, that the very low differential merits a shift to a new carrier at this time.

After comparing the plan design, premiums and taking into consideration past experience, we recommend a three-year contract award to our incumbent, Lincoln Financial, effective October 1, 2023.

LIFE & DISABILITY RATE COMPARISON 2023

RATES & VOLUME				2015-2020 RATES DEARBORN NATIONAL		2020-2023 RATES LINCOLN FINANCIAL		LINCOLN (RENEWAL)		ONEAMERICA (wo WOP)		ONEAMERICA (w WOP)		SUN LIFE		BCBSTX	
Plan Name	Age	Lives	Volume	Rate	Premium	Rate	Premium	Rate	Premium	Rate	Premium	Rate	Premium	Rate	Premium	Rate	Premium
Basic Life Plan 2023 / Commissioners		7	\$ 525,000.00	0.036	\$ 18.90	0.031	\$ 16.28	0.028	\$ 14.70	0.031	\$ 16.28	0.031	\$ 16.28	0.037	\$ 19.43	0.069	\$ 36.23
Basic Life Plan 2023 / Commissioners Total		7	\$ 525,000.00		\$ 18.90		\$ 16.28		\$ 14.70		\$ 16.28		\$ 16.28		\$ 19.43		\$ 36.23
Basic Life Plan 2023 / General		1896	\$ 142,963,000.00	0.036	\$ 5,146.67	0.031	\$ 4,431.85	0.028	\$ 4,002.96	0.031	\$ 4,431.85	0.031	\$ 4,431.85	0.037	\$ 5,289.63	0.069	\$ 9,864.45
Basic Life Plan 2023 / General Total		1896	\$ 142,963,000.00		\$ 5,146.67		\$ 4,431.85		\$ 4,002.96		\$ 4,431.85		\$ 4,431.85		\$ 5,289.63		\$ 9,864.45
Basic Life Plan 2023/ PUB & Bridge Board		10	\$ 750,000.00	0.036	\$ 27.00	0.031	\$ 23.25	0.028	\$ 21.00	0.031	\$ 23.25	0.031	\$ 23.25	0.037	\$ 27.75	0.069	\$ 51.75
Basic Life Plan 2023 / PUB & Bridge Board Total		10	\$ 750,000.00		\$ 27.00		\$ 23.25		\$ 21.00		\$ 23.25		\$ 23.25		\$ 27.75		\$ 51.75
Short Term Disability (14 Day)	0-19	0	\$ -	0.240	\$ -	0.200	\$ -	0.240	\$ -	0.270	\$ -	0.270	\$ -	0.220	\$ -	0.218	\$ -
Short Term Disability (14 Day)	20-24	24	\$ 9,290.27	0.240	\$ 222.97	0.200	\$ 185.81	0.240	\$ 222.97	0.270	\$ 250.84	0.270	\$ 250.84	0.220	\$ 204.39	0.218	\$ 202.53
Short Term Disability (14 Day)	25-29	45	\$ 18,912.40	0.280	\$ 529.55	0.240	\$ 453.90	0.280	\$ 529.55	0.324	\$ 612.76	0.324	\$ 612.76	0.260	\$ 491.72	0.261	\$ 493.61
Short Term Disability (14 Day)	30-34	55	\$ 22,439.58	0.240	\$ 538.55	0.200	\$ 448.79	0.240	\$ 538.55	0.270	\$ 605.87	0.270	\$ 605.87	0.220	\$ 493.67	0.218	\$ 489.18
Short Term Disability (14 Day)	35-39	40	\$ 18,342.22	0.240	\$ 440.21	0.210	\$ 385.19	0.240	\$ 440.21	0.284	\$ 520.92	0.284	\$ 520.92	0.230	\$ 421.87	0.229	\$ 420.04
Short Term Disability (14 Day)	40-44	56	\$ 28,067.04	0.280	\$ 785.88	0.200	\$ 561.34	0.280	\$ 785.88	0.270	\$ 757.81	0.270	\$ 757.81	0.220	\$ 617.47	0.218	\$ 611.86
Short Term Disability (14 Day)	45-49	31	\$ 13,712.18	0.300	\$ 411.37	0.240	\$ 329.09	0.300	\$ 411.37	0.324	\$ 444.27	0.324	\$ 444.27	0.260	\$ 356.52	0.261	\$ 357.89
Short Term Disability (14 Day)	50-54	30	\$ 14,512.56	0.340	\$ 493.43	0.260	\$ 377.33	0.340	\$ 493.43	0.351	\$ 509.39	0.351	\$ 509.39	0.290	\$ 420.86	0.283	\$ 410.71
Short Term Disability (14 Day)	55-59	28	\$ 12,549.99	0.440	\$ 552.20	0.290	\$ 363.95	0.440	\$ 552.20	0.392	\$ 491.96	0.392	\$ 491.96	0.320	\$ 401.60	0.316	\$ 396.58
Short Term Disability (14 Day)	60-64	12	\$ 6,925.41	0.520	\$ 360.12	0.370	\$ 256.24	0.520	\$ 360.12	0.500	\$ 346.27	0.500	\$ 346.27	0.410	\$ 283.94	0.403	\$ 279.09
Short Term Disability (14 Day)	65-69	2	\$ 1,004.47	0.580	\$ 58.26	0.440	\$ 44.20	0.580	\$ 58.26	0.594	\$ 59.67	0.594	\$ 59.67	0.480	\$ 48.21	0.479	\$ 48.11
Short Term Disability (14 Day)	70-100	1	\$ 313.67	0.580	\$ 18.19	0.490	\$ 15.37	0.580	\$ 18.19	0.662	\$ 20.76	0.662	\$ 20.76	0.540	\$ 16.94	0.534	\$ 16.75
Short Term Disability (14 Day) Total		324	\$ 146,069.79		\$ 4,410.72		\$ 3,421.20		\$ 4,410.72		\$ 4,620.52		\$ 4,620.52		\$ 3,757.20		\$ 3,726.35
Short Term Disability (7 Day)	0-19	1	346.32	0.300	\$ 10.39	0.260	\$ 9.00	0.300	\$ 10.39	0.351	\$ 12.16	0.351	\$ 12.16	0.290	\$ 10.04	0.283	\$ 9.80
Short Term Disability (7 Day)	20-24	23	8596.32	0.300	\$ 257.89	0.290	\$ 249.29	0.300	\$ 257.89	0.351	\$ 301.73	0.351	\$ 301.73	0.290	\$ 249.29	0.283	\$ 243.28
Short Term Disability (7 Day)	25-29	48	20259.31	0.340	\$ 688.82	0.260	\$ 526.74	0.340	\$ 688.82	0.392	\$ 794.16	0.392	\$ 794.16	0.320	\$ 648.30	0.316	\$ 640.19
Short Term Disability (7 Day)	30-34	57	24635.34	0.300	\$ 739.06	0.260	\$ 640.52	0.300	\$ 739.06	0.351	\$ 864.70	0.351	\$ 864.70	0.290	\$ 714.42	0.283	\$ 697.18
Short Term Disability (7 Day)	35-39	55	25191.72	0.300	\$ 755.75	0.260	\$ 654.98	0.300	\$ 755.75	0.351	\$ 884.23	0.351	\$ 884.23	0.290	\$ 730.56	0.316	\$ 796.06
Short Term Disability (7 Day)	40-44	43	19579.37	0.340	\$ 665.70	0.290	\$ 567.80	0.340	\$ 665.70	0.392	\$ 767.51	0.392	\$ 767.51	0.320	\$ 626.54	0.316	\$ 618.71
Short Term Disability (7 Day)	45-49	47	20339.92	0.360	\$ 732.24	0.310	\$ 630.54	0.360	\$ 732.24	0.419	\$ 852.24	0.419	\$ 852.24	0.340	\$ 691.56	0.338	\$ 687.49
Short Term Disability (7 Day)	50-54	45	20925.53	0.400	\$ 837.02	0.340	\$ 711.47	0.400	\$ 837.02	0.459	\$ 960.48	0.459	\$ 960.48	0.370	\$ 774.24	0.370	\$ 774.24
Short Term Disability (7 Day)	55-59	29	11711.75	0.540	\$ 632.43	0.460	\$ 538.74	0.540	\$ 632.43	0.621	\$ 727.30	0.621	\$ 727.30	0.510	\$ 597.30	0.501	\$ 586.76
Short Term Disability (7 Day)	60-64	7	2844.61	0.620	\$ 176.37	0.530	\$ 150.76	0.620	\$ 176.37	0.716	\$ 203.67	0.716	\$ 203.67	0.580	\$ 164.99	0.577	\$ 164.13
Short Term Disability (7 Day)	65-69	3	1331.76	0.700	\$ 93.22	0.600	\$ 79.91	0.700	\$ 93.22	0.810	\$ 107.87	0.810	\$ 107.87	0.660	\$ 87.90	0.653	\$ 86.96
Short Term Disability (7 Day)	70-100	0	\$ -	0.700	\$ -	0.600	\$ -	0.700	\$ -	0.810	\$ -	0.810	\$ -	0.660	\$ -	0.653	\$ -
Short Term Disability (7 Day) Total		358	\$ 155,761.95		\$ 5,588.89		\$ 4,759.76		\$ 5,588.89		\$ 6,476.06		\$ 6,476.06		\$ 5,295.14		\$ 5,304.81
Long Term Disability (2 Yr)	0-19	1	\$ 2,501.20	0.0800	\$ 2.00	0.070	\$ 1.75	0.070	\$ 1.75	0.067	\$ 1.68	0.070	\$ 1.75	0.070	\$ 1.75	0.070	\$ 1.75
Long Term Disability (2 Yr)	20-24	11	\$ 31,107.01	0.0800	\$ 24.89	0.070	\$ 21.77	0.070	\$ 21.77	0.067	\$ 20.84	0.070	\$ 21.77	0.070	\$ 21.77	0.070	\$ 21.77
Long Term Disability (2 Yr)	25-29	42	\$ 130,248.62	0.1000	\$ 130.25	0.090	\$ 117.22	0.090	\$ 117.22	0.086	\$ 112.01	0.090	\$ 117.22	0.090	\$ 117.22	0.090	\$ 117.22
Long Term Disability (2 Yr)	30-34	45	\$ 145,559.83	0.1200	\$ 174.67	0.110	\$ 160.12	0.110	\$ 160.12	0.105	\$ 152.84	0.110	\$ 160.12	0.110	\$ 160.12	0.110	\$ 160.12
Long Term Disability (2 Yr)	35-39	50	\$ 168,459.36	0.1600	\$ 269.53	0.140	\$ 235.84	0.140	\$ 235.84	0.133	\$ 224.05	0.140	\$ 235.84	0.140	\$ 235.84	0.140	\$ 235.84
Long Term Disability (2 Yr)	40-44	54	\$ 217,486.44	0.2000	\$ 434.97	0.180	\$ 391.48	0.180	\$ 391.48	0.171	\$ 371.90	0.180	\$ 391.48	0.180	\$ 391.48	0.180	\$ 391.48
Long Term Disability (2 Yr)	45-49	50	\$ 178,698.27	0.2600	\$ 464.62	0.230	\$ 411.01	0.230	\$ 411.01	0.219	\$ 391.35	0.230	\$ 411.01	0.230	\$ 411.01	0.230	\$ 411.01
Long Term Disability (2 Yr)	50-54	52	\$ 223,845.72	0.3400	\$ 761.08	0.300	\$ 671.54	0.300	\$ 671.54	0.285	\$ 637.96	0.300	\$ 671.54	0.300	\$ 671.54	0.300	\$ 671.54
Long Term Disability (2 Yr)	55-59	37	\$ 111,118.69	0.4400	\$ 488.92	0.390	\$ 433.36	0.390	\$ 433.36	0.371	\$ 412.25	0.390	\$ 433.36	0.390	\$ 433.36	0.390	\$ 433.36
Long Term Disability (2 Yr)	60-64	19	\$ 67,841.75	0.7200	\$ 488.46	0.640	\$ 434.19	0.640	\$ 434.19	0.608	\$ 412.48	0.640	\$ 434.19	0.640	\$ 434.19	0.640	\$ 434.19
Long Term Disability (2 Yr)	65-69	0	\$ -	0.9200	\$ -	0.820	\$ -	0.820	\$ -	0.779	\$ -	0.820	\$ -	0.820	\$ -	0.820	\$ -
Long Term Disability (2 Yr)	70-100	0	\$ -	1.4000	\$ -	1.250	\$ -	1.250	\$ -	1.188	\$ -	1.250	\$ -	1.250	\$ -	1.250	\$ -
Long Term Disability (2 Yr) Total		361	\$ 1,276,866.89		\$ 3,239.39		\$ 2,878.28		\$ 2,878.28		\$ 2,737.36		\$ 2,878.28		\$ 2,878.28		\$ 2,878.28
Long Term Disability (5 Yr)	0-19	0	\$ -	0.1200	\$ -	0.110	\$ -	0.110	\$ -	0.105	\$ -	0.110	\$ -	0.110	\$ -	0.110	\$ -
Long Term Disability (5 Yr)	20-24	11	\$ 17,152.77	0.1200	\$ 20.58	0.110	\$ 18.87	0.110	\$ 18.87	0.105	\$ 18.01	0.110	\$ 18.87	0.110	\$ 18.87	0.110	\$ 18.868
Long Term Disability (5 Yr)	25-29	18	\$ 34,033.12	0.1600	\$ 54.45	0.140	\$ 47.65	0.140	\$ 47.65	0.133	\$ 45.26	0.140	\$ 47.65	0.140	\$ 47.65	0.140	\$ 47.646
Long Term Disability (5 Yr)	30-34	35	\$ 66,620.02	0.1800	\$ 119.92	0.160	\$ 106.59	0.160	\$ 106.59	0.152	\$ 101.26	0.160	\$ 106.59	0.160	\$ 106.59	0.160	\$ 106.592
Long Term Disability (5 Yr)	35-39	24	\$ 115,103.82	0.2600	\$ 299.27	0.230	\$ 264.74	0.230	\$ 264.74	0.219	\$ 252.08	0.230	\$ 264.74	0.230	\$ 264.74	0.230	\$ 264.739
Long Term Disability (5 Yr)	40-44	28	\$ 72,350.82	0.3400	\$ 245.99	0.300	\$ 217.05	0.300	\$ 217.05	0.285	\$ 206.20	0.300	\$ 217.05	0.300	\$ 217.05	0.300	\$ 217.052
Long Term Disability (5 Yr)	45-49	25	\$ 136,899.94	0.4600	\$ 629.74	0.410	\$ 561.29	0.410	\$ 561.29	0.390	\$ 533.91	0.410	\$ 561.29	0.410	\$ 561.29	0.410	\$ 561.290
Long Term Disability (5 Yr)	50-54	35	\$ 118,878.52	0.6200	\$ 737.05	0.550	\$ 653.83	0.550	\$ 653.83	0.523	\$ 621.73	0.550	\$ 653.83	0.550	\$ 653.83	0.550	\$ 653.832
Long Term Disability (5 Yr)	55-59	16	\$ 40,740.89	0.8000	\$ 325.93	0.710	\$ 289.26	0.710	\$ 289.26	0.675	\$ 275.00	0.710	\$ 289.26	0.710	\$ 289.26	0.710	\$ 289.260
Long Term Disability (5 Yr)	60-64	2	\$ 15,757.66	1.4000	\$ 220.61	1.250	\$ 196.97	1.250	\$ 196.97	1.188	\$ 187.20	1.250	\$ 196.97	1.250	\$ 196.97	1.250	\$ 196.971
Long Term Disability (5 Yr)	65-69	3	\$ 3,132.13	1.3400	\$ 41.97	1.190	\$ 37.27	1.190	\$ 37.27	1.131	\$ 35.42	1.190	\$ 37.27	1.190	\$ 37.27	1.190	\$ 37.272
Long Term Disability (5 Yr)	70-100	0	\$ -	1.3200	\$ -	1.170	\$ -	1.170	\$ -	1.112	\$ -	1.170	\$ -	1.170	\$ -	1.170	\$ -
Long Term Disability (5 Yr) Total		197	\$ 620,669.69		\$ 2,695.51		\$ 2,393.52		\$ 2,393.52		\$ 2,276.08		\$ 2,393.52		\$ 2,393.52		\$ 2,393.52

RATES & VOLUME				2015-2020 RATES DEARBORN NATIONAL		2020-2023 RATES LINCOLN FINANCIAL		LINCOLN (RENEWAL)		ONEAMERICA (wo WOP)		ONEAMERICA (w WOP)		SUN LIFE		BCBSTX	
Plan Name	Age	Lives	Volume	Rate	Premium	Rate	Premium	Rate	Premium	Rate	Premium	Rate	Premium	Rate	Premium	Rate	Premium
Long Term Disability (Age 65)	0-19	0	\$ -	0.200	\$ -	0.180	\$ -	0.180	\$ -	0.171	\$ -	0.180	\$ -	0.180	\$ -	0.180	\$ -
Long Term Disability (Age 65)	20-24	13	\$ 36,090.18	0.200	\$ 72.18	0.180	\$ 64.96	0.180	\$ 64.96	0.171	\$ 61.71	0.180	\$ 64.96	0.180	\$ 64.96	0.180	\$ 64.962
Long Term Disability (Age 65)	25-29	32	\$ 101,932.88	0.240	\$ 244.64	0.210	\$ 214.06	0.210	\$ 214.06	0.200	\$ 203.87	0.210	\$ 214.06	0.210	\$ 214.06	0.210	\$ 214.059
Long Term Disability (Age 65)	30-34	40	\$ 137,289.96	0.320	\$ 439.33	0.280	\$ 384.41	0.280	\$ 384.41	0.266	\$ 365.19	0.280	\$ 384.41	0.280	\$ 384.41	0.280	\$ 384.412
Long Term Disability (Age 65)	35-39	48	\$ 176,567.41	0.460	\$ 812.21	0.410	\$ 723.93	0.410	\$ 723.93	0.390	\$ 688.61	0.410	\$ 723.93	0.410	\$ 723.93	0.410	\$ 723.926
Long Term Disability (Age 65)	40-44	34	\$ 128,829.71	0.680	\$ 876.04	0.610	\$ 785.86	0.610	\$ 785.86	0.580	\$ 747.21	0.610	\$ 785.86	0.610	\$ 785.86	0.610	\$ 785.861
Long Term Disability (Age 65)	45-49	17	\$ 62,922.89	0.860	\$ 541.14	0.770	\$ 484.51	0.770	\$ 484.51	0.732	\$ 460.60	0.770	\$ 484.51	0.770	\$ 484.51	0.770	\$ 484.506
Long Term Disability (Age 65)	50-54	24	\$ 76,410.11	1.000	\$ 764.10	0.890	\$ 680.05	0.890	\$ 680.05	0.846	\$ 646.43	0.890	\$ 680.05	0.890	\$ 680.05	0.890	\$ 680.050
Long Term Disability (Age 65)	55-59	19	\$ 67,293.02	1.060	\$ 713.31	0.940	\$ 632.55	0.940	\$ 632.55	0.893	\$ 600.93	0.940	\$ 632.55	0.940	\$ 632.55	0.940	\$ 632.554
Long Term Disability (Age 65)	60-64	4	\$ 21,344.18	1.060	\$ 226.25	0.940	\$ 200.64	0.940	\$ 200.64	0.893	\$ 190.60	0.940	\$ 200.64	0.940	\$ 200.64	0.940	\$ 200.635
Long Term Disability (Age 65)	65-69	2	\$ 7,477.92	0.780	\$ 58.33	0.690	\$ 51.60	0.690	\$ 51.60	0.656	\$ 49.06	0.690	\$ 51.60	0.690	\$ 51.60	0.690	\$ 51.598
Long Term Disability (Age 65)	70-100	0	\$ -	1.300	\$ -	1.160	\$ -	1.160	\$ -	1.102	\$ -	1.160	\$ -	1.160	\$ -	1.160	\$ -
Long Term Disability (Age 65) Total	233		\$ 816,158.26		\$ 4,747.52		\$ 4,222.56		\$ 4,222.56		\$ 4,014.21		\$ 4,222.56		\$ 4,222.56		\$ 4,222.56
Voluntary Life Plan with AD&D	0-24	10	\$ 1,140,000.00	0.076	\$ 86.64	0.076	\$ 86.64	0.076	\$ 86.64	0.074	\$ 84.36	0.076	\$ 86.64	0.076	\$ 86.64	0.076	\$ 86.64
Voluntary Life Plan with AD&D	25-29	58	\$ 8,680,000.00	0.086	\$ 746.48	0.086	\$ 746.48	0.086	\$ 746.48	0.083	\$ 720.44	0.086	\$ 746.48	0.086	\$ 746.48	0.002	\$ 14.58
Voluntary Life Plan with AD&D	30-34	87	\$ 12,730,000.00	0.114	\$ 1,451.22	0.114	\$ 1,451.22	0.114	\$ 1,451.22	0.110	\$ 1,400.30	0.114	\$ 1,451.22	0.114	\$ 1,451.22	0.114	\$ 1,451.22
Voluntary Life Plan with AD&D	35-39	116	\$ 16,310,000.00	0.152	\$ 2,479.12	0.152	\$ 2,479.12	0.152	\$ 2,479.12	0.146	\$ 2,381.26	0.152	\$ 2,479.12	0.152	\$ 2,479.12	0.152	\$ 2,479.12
Voluntary Life Plan with AD&D	40-44	143	\$ 20,130,000.00	0.202	\$ 4,066.26	0.202	\$ 4,066.26	0.202	\$ 4,066.26	0.193	\$ 3,885.09	0.202	\$ 4,066.26	0.202	\$ 4,066.26	0.202	\$ 4,066.26
Voluntary Life Plan with AD&D	45-49	104	\$ 14,210,000.00	0.304	\$ 4,319.84	0.304	\$ 4,319.84	0.304	\$ 4,319.84	0.290	\$ 4,120.90	0.304	\$ 4,319.84	0.304	\$ 4,319.84	0.304	\$ 4,319.84
Voluntary Life Plan with AD&D	50-54	97	\$ 10,320,000.00	0.484	\$ 4,994.88	0.484	\$ 4,994.88	0.484	\$ 4,994.88	0.461	\$ 4,757.52	0.484	\$ 4,994.88	0.484	\$ 4,994.88	0.484	\$ 4,994.88
Voluntary Life Plan with AD&D	55-59	62	\$ 6,710,000.00	0.702	\$ 4,710.42	0.702	\$ 4,710.42	0.702	\$ 4,710.42	0.668	\$ 4,482.28	0.702	\$ 4,710.42	0.702	\$ 4,710.42	0.702	\$ 4,710.42
Voluntary Life Plan with AD&D	60-64	25	\$ 1,470,000.00	0.936	\$ 1,375.92	0.936	\$ 1,375.92	0.936	\$ 1,375.92	0.891	\$ 1,309.77	0.936	\$ 1,375.92	0.936	\$ 1,375.92	0.936	\$ 1,375.92
Voluntary Life Plan with AD&D	65-69	3	\$ 110,000.00	1.776	\$ 195.36	1.776	\$ 195.36	1.776	\$ 195.36	1.689	\$ 185.79	1.776	\$ 195.36	1.776	\$ 195.36	1.776	\$ 195.36
Voluntary Life 70-74	70-74	1	\$ 32,500.00	3.202	\$ 104.07	3.205	\$ 104.16	3.205	\$ 104.16	3.046	\$ 99.00	3.205	\$ 104.16	3.205	\$ 104.16	3.202	\$ 104.07
Voluntary Life 75+	75+	0	\$ 0	5.770	\$ -	5.770	\$ -	5.770	\$ -	5.483	\$ -	5.770	\$ -	5.770	\$ -	5.770	\$ -
Voluntary Life Plan with AD&D Total	706		\$ 91,842,500.00		\$ 24,530.21		\$ 24,530.30		\$ 24,530.30		\$ 23,426.71		\$ 24,530.30		\$ 24,530.30		\$ 23,798.31
Voluntary Life Plan with AD&D - Child		314	\$ 3,140,000.00	0.260	\$ 816.40	0.230	\$ 722.20	0.230	\$ 722.20	0.240	\$ 753.60	0.240	\$ 753.60	0.23	\$ 722.20	0.230	\$ 722.20
Voluntary Life Plan with AD&D - Child Total	314		\$ 3,140,000.00		\$ 816.40		\$ 722.20		\$ 722.20		\$ 753.60		\$ 753.60		\$ 722.20		\$ 722.20
Voluntary Life Plan with AD&D - Spouse	0-24	0	\$ -	0.106	\$ -	0.076	\$ -	0.076	\$ -	0.074	\$ -	0.076	\$ -	0.076	\$ -	0.076	\$ -
Voluntary Life Plan with AD&D - Spouse	25-29	14	\$ 925,000.00	0.116	\$ 107.30	0.086	\$ 79.55	0.086	\$ 79.55	0.083	\$ 76.78	0.086	\$ 79.55	0.086	\$ 79.55	0.002	\$ 1.55
Voluntary Life Plan with AD&D - Spouse	30-34	21	\$ 1,230,000.00	0.144	\$ 177.12	0.114	\$ 140.22	0.114	\$ 140.22	0.110	\$ 135.30	0.114	\$ 140.22	0.114	\$ 140.22	0.114	\$ 140.22
Voluntary Life Plan with AD&D - Spouse	35-39	43	\$ 2,325,000.00	0.182	\$ 423.15	0.152	\$ 353.40	0.152	\$ 353.40	0.146	\$ 339.45	0.152	\$ 353.40	0.152	\$ 353.40	0.152	\$ 353.40
Voluntary Life Plan with AD&D - Spouse	40-44	57	\$ 3,375,000.00	0.232	\$ 783.00	0.202	\$ 681.75	0.202	\$ 681.75	0.193	\$ 651.38	0.202	\$ 681.75	0.202	\$ 681.75	0.202	\$ 681.75
Voluntary Life Plan with AD&D - Spouse	45-49	50	\$ 2,850,000.00	0.334	\$ 951.90	0.304	\$ 866.40	0.304	\$ 866.40	0.290	\$ 826.50	0.304	\$ 866.40	0.304	\$ 866.40	0.304	\$ 866.40
Voluntary Life Plan with AD&D - Spouse	50-54	51	\$ 2,305,000.00	0.514	\$ 1,184.77	0.484	\$ 1,115.62	0.484	\$ 1,115.62	0.461	\$ 1,062.61	0.484	\$ 1,115.62	0.484	\$ 1,115.62	0.484	\$ 1,115.62
Voluntary Life Plan with AD&D - Spouse	55-59	25	\$ 1,540,000.00	0.732	\$ 1,127.28	0.702	\$ 1,081.08	0.702	\$ 1,081.08	0.668	\$ 1,028.72	0.702	\$ 1,081.08	0.702	\$ 1,081.08	0.702	\$ 1,081.08
Voluntary Life Plan with AD&D - Spouse	60-64	7	\$ 145,000.00	0.966	\$ 140.07	0.936	\$ 135.72	0.936	\$ 135.72	0.891	\$ 129.20	0.936	\$ 135.72	0.936	\$ 135.72	0.936	\$ 135.72
Voluntary Life Plan with AD&D - Spouse	65-69	1	\$ 15,000.00	1.806	\$ 27.09	1.776	\$ 26.64	1.776	\$ 26.64	1.689	\$ 25.34	1.776	\$ 26.64	1.776	\$ 26.64	1.776	\$ 26.64
Voluntary Life 70-74 - Spouse		1	\$ 13,000.00	3.232	\$ 42.02	3.202	\$ 41.63	3.202	\$ 41.63	3.046	\$ 39.60	3.205	\$ 41.67	3.205	\$ 41.67	3.202	\$ 41.63
Voluntary Life 75+ - Spouse		0	\$ 0	5.800	\$ -	5.770	\$ -	5.770	\$ -	5.483	\$ -	5.770	\$ -	5.770	\$ -	5.770	\$ -
Voluntary Life Plan with AD&D - Spouse Total	270		\$ 14,723,000.00		\$ 4,963.70		\$ 4,522.01		\$ 4,522.01		\$ 4,314.85		\$ 4,522.05		\$ 4,522.05		\$ 4,444.01
Grand Total			\$ 256,959,026.58		\$ 56,184.89		\$ 51,921.21		\$ 53,307.14		\$ 53,090.77		\$ 54,868.28		\$ 53,658.06		\$ 57,442.47

Plan Type	LFG (Current)	LFG (Renewal)	1 ONE AMERICA	2 ONE AMERICA	SUN LIFE	BCBSTX
Basic Life Plan / Commissioners	\$ 16.28	\$ 14.70	\$ 16.28	\$ 16.28	\$ 19.43	\$ 36.23
Basic Life Plan / General	\$ 4,431.85	\$ 4,002.96	\$ 4,431.85	\$ 4,431.85	\$ 5,289.63	\$ 9,864.45
Basic Life Plan / PUB & Bridge Board	\$ 23.25	\$ 21.00	\$ 23.25	\$ 23.25	\$ 27.75	\$ 51.75
Short Term Disability (14 Day)	\$ 3,421.20	\$ 4,410.72	\$ 4,620.52	\$ 4,620.52	\$ 3,757.20	\$ 3,726.35
Short Term Disability (7 Day)	\$ 4,759.76	\$ 5,588.89	\$ 6,476.06	\$ 6,476.06	\$ 5,295.14	\$ 5,304.81
Long Term Disability (2 Yr)	\$ 2,878.28	\$ 2,878.28	\$ 2,737.36	\$ 2,878.28	\$ 2,878.28	\$ 2,878.28
Long Term Disability (5 Yr)	\$ 2,393.52	\$ 2,393.52	\$ 2,276.08	\$ 2,393.52	\$ 2,393.52	\$ 2,393.52
Long Term Disability (Age 65)	\$ 4,222.56	\$ 4,222.56	\$ 4,014.21	\$ 4,222.56	\$ 4,222.56	\$ 4,222.56
Voluntary Life Plan with AD&D	\$ 24,530.30	\$ 24,530.30	\$ 23,426.71	\$ 24,530.30	\$ 24,530.30	\$ 23,798.31
Voluntary Life Plan with AD&D - Child	\$ 722.20	\$ 722.20	\$ 753.60	\$ 753.60	\$ 722.20	\$ 722.20
Voluntary Life Plan with AD&D - Spouse	\$ 4,522.01	\$ 4,522.01	\$ 4,314.85	\$ 4,522.05	\$ 4,522.05	\$ 4,444.01
Monthly Total	\$ 51,921.21	\$ 53,307.14	\$ 53,090.77	\$ 54,868.28	\$ 53,658.06	\$ 57,442.47
Annual Total	\$ 623,054.51	\$ 639,685.73	\$ 637,089.29	\$ 658,419.32	\$ 643,896.74	\$ 689,309.59
Differential to Current		\$ 16,631.22	\$ 14,034.78	\$ 35,364.81	\$ 20,842.23	\$ 66,255.08

Term Life & Disability Implementation Credit

Allowances - Year 1	\$10,000	\$2,500	\$30,000	\$30,000	\$0	\$0
Allowances - Year 2	\$10,000	\$2,500	\$0	\$0	\$0	\$0
Allowances - Year 3	\$10,000	\$2,500	\$0	\$0	\$0	\$0
Rate Guarantee	24 Months	36 Months	36 Months	36 Months	36 Months	36 Months

BASIC LIFE & VOLUNTARY LIFE OPTIONS 2023

PLAN TYPE	LIVES	VOLUME	LINCOLN (CURRENT)	LINCOLN (RENEWAL)	1 ONEAMERICA	2 ONEAMERICA	SUN LIFE	BCBSTX
Basic Life Plan / Commissioners	7	\$ 525,000.00	\$ 16.28	\$ 14.70	\$ 16.28	\$ 16.28	\$ 19.43	\$ 36.23
Basic Life Plan / General	1896	\$ 142,963,000.00	\$ 4,431.85	\$ 4,002.96	\$ 4,431.85	\$ 4,431.85	\$ 5,289.63	\$ 9,864.45
Basic Life Plan / PUB & Bridge Board	10	\$ 750,000.00	\$ 23.25	\$ 21.00	\$ 23.25	\$ 23.25	\$ 27.75	\$ 51.75
Basic Life Monthly Premium	1913	\$ 144,238,000.00	\$ 4,471.38	\$ 4,038.66	\$ 4,471.38	\$ 4,471.38	\$ 5,336.81	\$ 9,952.42
Voluntary Life Plan with AD&D - Employee	706	\$ 91,842,500.00	\$ 24,530.30	\$ 24,530.30	\$ 23,426.71	\$ 24,530.30	\$ 24,530.30	\$ 23,798.31
Voluntary Life Plan with AD&D - Child	314	\$ 3,140,000.00	\$ 722.20	\$ 722.20	\$ 753.60	\$ 753.60	\$ 722.20	\$ 722.20
Voluntary Life Plan with AD&D - Spouse	270	\$ 14,723,000.00	\$ 4,522.01	\$ 4,522.01	\$ 4,314.85	\$ 4,522.05	\$ 4,522.05	\$ 4,444.01
Voluntary Life with AD&D Monthly Premium	1290	\$ 109,705,500.00	\$ 29,774.51	\$ 29,774.51	\$ 28,495.16	\$ 29,805.95	\$ 29,774.55	\$ 28,964.52
Annual Basic & Voluntary Life Premium			\$ 410,950.64	\$ 405,758.02	\$ 395,598.43	\$ 411,327.91	\$ 421,336.24	\$ 467,003.27
Differential from Current				\$ -	\$ (15,352.21)	\$ 377.27	\$ 10,385.60	\$ 56,052.63

BASIC LIFE INSURANCE		LINCOLN	LINCOLN (RENEWAL)	1 ONEAMERICA	2 ONEAMERICA	SUN LIFE	BCBSTX
All Active Eligible Commission & Board		\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
All Active FT Employees		2x Salary up to \$100k	2x Salary up to \$100k	2x Salary up to \$100k	2x Salary up to \$100k	2x sal to 100K	2x Salary up to \$100k
Rate Guarantee		24 Months	36 Months	36 Months	36 Months	36m	36 Months
Conversion		Included	Included	Included	Included	included	Included
Accelerrated Death Benefit		Included	Included	Included	Included	included	Included
Waiver of Premium		Included	Included	Included	Included	included	Included
Age Reduction		65% at 70, 50% at 75	65% at 70, 50% at 75	65% at 70, 50% at 75	65% at 70, 50% at 75	to 65% at 65, to 50% at age 70	65% at 70, 50% at 75
VOLUNTARY LIFE AND AD&D		LINCOLN	LINCOLN (RENEWAL)	1 ONEAMERICA	2 ONEAMERICA	SUN LIFE	BCBSTX
Rate Guarantee		36 Months	36 Months	36 Months	36 Months	36 months	36 Months
Emp Minimum Coverage Amount		\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Emp Maximum Coverage Amount		\$500,000	\$500,000	\$500,000	\$500,000	\$500,000	\$500,000
Employee Guarantee Issue Limit		\$250,000	\$250,000	\$250,000	\$250,000	\$250,000	\$250,000
Emp Guarantee Issue 1st year		up to \$250,000 @ OE	up to \$250,000 @ OE	UP TO \$250K FOR NEW HIRES. Up to a \$20,000 increase regardless of GI limit up to \$500k for both increasing & late entrants	up to a \$20,000 increase regardless of GI limit up to \$500k	up to 250,000 at issue	up to \$250,000 for new hires. Up to \$50,000 (subject to GI) for existing enrollees and late entrants who have not been declined coverage in the past
Emp Guarantee Issue Subsequent Years		up to a \$20,000 increase regardless of GI limit up to \$500k	up to a \$20,000 increase regardless of GI limit up to \$500k	up to a \$20,000 increase regardless of GI limit up to \$500k	up to a \$20,000 increase regardless of GI limit up to \$500k	up to \$ 10,000 increase	up to a \$20,000, subject to 500k max and GI limit
Emp Age Reduction		65% at 70, 50% at 75	65% at 70, 50% at 75	65% at 70, 50% at 75	65% at 70, 50% at 75	to 65% at 65, to 50% at age 70	65% at 70, 50% at 75
Emp Conversion		upon termination	upon termination	upon termination	upon termination	included	upon termination
Emp Accelerated Death Benefit		Included	Included	Included	Included	included	Included
Emp Waiver of Premium		Not Included	Not Included	Not Included	Included	included	Included
Emp Portability		Included	Included	Included	Included	included	Included
Sp Minimum Coverage Amount		\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Sp Maximum Coverage Amount		\$250k, </= Emp coverage	\$250k, </= Emp coverage	\$250k, </= Emp coverage	\$250k, </= Emp coverage	\$ 250K (100% of employee)	\$250k, </= Emp coverage
Sp Guarantee Issue Limit		\$50,000, not to exceed Emp	\$50,000, not to exceed Emp	\$50,000, not to exceed Emp Amount	\$50,000, not to exceed Emp Amount	\$50,000	\$50,000, not to exceed Emp Amount
Sp Guarantee Issue 1st year		GI up to \$50k	GI up to \$50k	GI up to \$50k	GI up to \$50k	\$50,000	new hires:GI up to \$50k
Sp Guarantee Issue Subsequent years		Up to \$10,000 increase	Up to \$10,000 increase	Up to \$10,000 increase regardless of	Up to \$10,000 increase regardless of	up to 5,000 increase	Up to \$10,000, subject to 200k max
Sp Age Reduction		Driven by Employee Age	Driven by Employee Age	Driven by Employee Age	Driven by Employee Age	based upon employee age	Driven by Employee Age
Sp Termination Age		At Employee's	At Employee's	At Employee's	At Employee's	at employee termination/ retirement	At Employee's
Sp Conversion		Included	Included	Included	Included	Included	Included
Sp Accelerated Death Benefit		Included	Included	Included	Included	not available	Included
Sp Portability		Included	Included	Included	Included	Included	Included
Children Birth to age 14 days		\$1,000	\$1,000	\$10,000	\$10,000	\$1,000	\$1,000
Children Cov Amt: 15 days but less than 6 months		\$1,000	\$1,000	\$10,000	\$10,000	\$1,000	\$1,000
Children Cov Amt: 6 Mo - 26, if unmarried & FT Student		\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Employee Navigator Link		yes	yes	yes	yes		yes

SHORT TERM DISABILITY OPTIONS 2023

PLAN TYPE		LIVES	VOLUME	LINCOLN (Current)	LINCOLN (Renewal)		1 ONEAMERICA		2 ONEAMERICA		SUN LIFE		BCBSTX	
				PREMIUM	PREMIUM	Differential	PREMIUM	Differential	PREMIUM	Differential	PREMIUM	Differential	PREMIUM	Differential
Short Term Disability (14 Day) 2019-20		324	\$146,069.79	\$ 3,421.20	\$ 4,410.72	\$ 989.52	\$ 4,620.52	\$ 1,199.33	\$ 4,620.52	\$ 1,199.33	\$ 3,757.20	\$ 336.00	\$ 3,726.35	\$ 305.16
Short Term Disability (7 Day) 2019-20		358	\$155,761.95	\$ 4,759.76	\$ 5,588.89	\$ 829.13	\$ 6,476.06	\$ 1,716.30	\$ 6,476.06	\$ 1,716.30	\$ 5,295.14	\$ 535.38	\$ 5,304.81	\$ 545.05
Monthly Total		682	\$301,831.74	\$ 8,180.96	\$ 9,999.61		\$ 11,096.59		\$ 11,096.59		\$ 9,052.34		\$ 9,031.16	
Annual Total				\$ 98,171.50	\$ 119,995.29		\$ 133,159.04		\$ 133,159.04		\$ 108,628.13		\$ 108,373.94	
Differential					\$ 21,823.79		\$ 34,987.54		\$ 34,987.54		\$ 10,456.63		\$ 10,202.44	
SHORT TERM DISABILITY 7-DAY WAITING PERIOD				LINCOLN	LINCOLN		1 ONEAMERICA		2 ONEAMERICA		SUN LIFE		BCBSTX	
Rate Guarantee				24 Months	36 Months		36 Months		36 Months		36m		36 Months	
Benefit Percent				60%	60%		60%		60%		60%		60%	
Elimination Pd				7 Days	7 Days		7 Days		7 Days		7 days		7 Days	
Maximum Weekly Benefit				\$1,000	\$1,000		\$1,000		\$1,000		\$1,000		\$1,000	
Minimum Weekly Benefit				\$100	\$100		\$100		\$100		\$100		\$100	
Benefit Duration				13 Weeks	13 Weeks		13 Weeks		13 Weeks		12 weeks of payment		13 Weeks	
Pre-Existing Conditions				3/12 Pre-Ex Limitation	3/12 Pre-Ex Limitation		Matching inforce contract 3/6/12		Matching inforce contract 3/6/12		3/6/12 to match inforce		3/6/12 Pre-Ex Limitation	
Partial Disability Benefit				Included	Included		Included		Included		included		Included	
Guarantee Issue				Yes	Yes		Yes		Yes		yes		Yes	
SHORT TERM DISABILITY 14-DAY WAITING PERIOD				LINCOLN	LINCOLN		1 ONEAMERICA		2 ONEAMERICA		SUN LIFE		BCBSTX	
Rate Guarantee				36 Months	36 Months		36 Months		36 Months		36m		36 Months	
Benefit Percent				Not to exceed 60% of weekly benefit	Not to exceed 60% of weekly benefit		Not to exceed 60% of weekly benefit		Not to exceed 60% of weekly benefit		Not to exceed 60% of weekly benefit		Not to exceed 60% of weekly benefit	
Elimination Pd				14 Days	14 Days		14 Days		14 Days		14 days		14 Days	
Maximum Weekly Benefit				\$1,000	\$1,000		\$1,000		\$1,000		\$1,000		\$1,000	
Minimum Weekly Benefit				\$100	\$100		\$100		\$100		\$100		\$100	
Benefit Duration				13 Weeks	13 Weeks		13 Weeks		13 Weeks		11 weeks of payment		13 Weeks	
Pre-Existing Conditions				3/12 Pre-Ex Limitation	3/12 Pre-Ex Limitation		Matching inforce contract 3/6/12		Matching inforce contract 3/6/12		3/6/12 to match inforce		3/6/12 Pre-Ex Limitation	
Partial Disability Benefit				Included	Included		Included		Included		includec		Included	
Guarantee Issue				Yes	Yes		Yes		Yes		yes		Yes	
Waiver of Premium							Included		Included					

LONG TERM DISABILITY OPTIONS 2023												
PLAN TYPE	LIVES	VOLUME	LINCOLN (CURRENT)	LINCOLN (Renewal)	1 ONE AMERICA		2 ONE AMERICA		SUN LIFE		BCBSTX	
			Premium	Premium	Premium	Savings	Premium	Savings	Premium	Savings	Premium	Savings
Long Term Disability (2 Yr) 2019-20	361	1,276,866.89	\$ 2,878.28	\$ 2,878.28	\$ 2,737.36	\$ (140.92)	\$ 2,878.28	\$ -	\$ 2,878.28	\$ -	\$ 2,878.28	\$ -
Long Term Disability (5 Yr) 2019-20	197	\$620,669.69	\$ 2,393.52	\$ 2,393.52	\$ 2,276.08	\$ (117.44)	\$ 2,393.52	\$ -	\$ 2,393.52	\$ -	\$ 2,393.52	\$ -
Long Term Disability (Age 65) 2019-20	233	\$816,158.26	\$ 4,222.56	\$ 4,222.56	\$ 4,014.21	\$ (208.36)	\$ 4,222.56	\$ -	\$ 4,222.56	\$ -	\$ 4,222.56	\$ -
Monthly Total	791	2,713,694.84	\$ 9,494.36	\$ 9,494.36	\$ 9,027.65	\$ (466.71)	\$ 9,494.36	\$ -	\$ 9,494.36	\$ -	\$ 9,494.36	\$ -
Annual Total			\$ 113,932.37	\$ 113,932.37	\$ 108,331.82	\$ (5,600.56)	\$ 113,932.37	\$ -	\$ 113,932.37	\$ -	\$ 113,932.37	\$ -
Savings				\$0.00	\$9,027.65		\$0.00		\$0.00		\$0.00	
LONG TERM DISABILITY (2 Yr)			LINCOLN	LINCOLN	1 ONE AMERICA		2 ONE AMERICA		SUN LIFE		BCBSTX	
Rate Guarantee			36 Months	36 Months	36 Months		36 Months		36 Months		36 Months	
Benefit Percent			60%	60%	60%		60%		60%		60%	
Maximum Mo Benefit			\$5,000	\$5,000	\$5,000		\$5,000		\$5,000		\$5,000	
Minimum Mo Benefit			> of \$100 or 10% Gross	> of \$100 or 10% Gross	> of \$100 or 10% Gross		> of \$100 or 10% Gross		greated 100 mor 10% gross		> of \$100 or 10% Gross	
Guarantee Issue			Yes	Yes	Yes		Yes		Yes		Yes	
Elimination Pd			90 Days	90 Days	90 Days		90 Days		90		90 Days	
Maximum Benefit Period			up to 2 years	up to 2 years	up to 2 years		up to 2 years		2 years to age 70		up to 2 years or age 70	
Pre-Existing Conditions			3/12 Pre-Ex Limitation	3/12 Pre-Ex Limitation	3/12 Pre-Ex Limitation		3/12 Pre-Ex Limitation		3/12 pre ex		3/12 Pre-Ex Limitation	
LONG TERM DISABILITY (5 Yr)			LINCOLN	LINCOLN	1 ONE AMERICA		2 ONE AMERICA		SUN LIFE		BCBSTX	
Rate Guarantee			24 Months	36 Months	36 Months		36 Months		36m		36 Months	
Benefit Percent			60%	60%	60%		60%		60%		60%	
Maximum Mo Benefit			\$5,000	\$5,000	\$5,000		\$5,000		\$5,000		\$5,000	
Minimum Mo Benefit			> of \$100 or 10% Gross	> of \$100 or 10% Gross	> of \$100 or 10% Gross		> of \$100 or 10% Gross		greated 100 mor 10% gross		> of \$100 or 10% Gross	
Guarantee Issue			Yes	Yes	Yes		Yes		yes		Yes	
Elimination Pd			90 Days	90 Days	90 Days		90 Days		90		90 Days	
Maximum Benefit Period			up to 5 years	up to 5 years	up to 5 years		up to 5 years		5 years to age 70		up to 5 years or age 70	
Pre-Existing Conditions			3/12 Pre-Ex Limitation	3/12 Pre-Ex Limitation	3/12 Pre-Ex Limitation		3/12 Pre-Ex Limitation		3/12 pre ex		3/12 Pre-Ex Limitation	
LONG TERM DISABILITY (Age 65/SSNRA)			LINCOLN	LINCOLN	1 ONE AMERICA		2 ONE AMERICA		SUN LIFE		BCBSTX	
Rate Guarantee			36 Months	36 Months	36 Months		36 Months		36m		36 Months	
Benefit Percent			60%	60%	60%		60%		60%		60%	
Maximum Mo Benefit			\$5,000	\$5,000	\$5,000		\$5,000		\$5,000		\$5,000	
Minimum Mo Benefit			> of \$100 or 10% Gross	> of \$100 or 10% Gross	> of \$100 or 10% Gross		> of \$100 or 10% Gross		greated 100 mor 10% gross		> of \$100 or 10% Gross	
Guarantee Issue			Yes	Yes	Yes		Yes		yes		Yes	
Elimination Pd			90 Days	90 Days	90 Days		90 Days		90		90 Days	
Maximum Benefit Period			Later of Age 65 or SSNRA	Later of Age 65 or SSNRA	Later of Age 65 or SSNRA		Later of Age 65 or SSNRA		SSNRA/ ADEA		Later of Age 65 or SSNRA	
Pre-Existing Conditions			3/12 Pre-Ex Limitation	3/12 Pre-Ex Limitation	3/12 Pre-Ex Limitation		3/12 Pre-Ex Limitation		3/12 pre ex		3/12 Pre-Ex Limitation	



AGENDA ITEM

3.d.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/17/2023

MEETING DATE

4/25/2023

1. Agenda Item: Consideration and Authorization to Declare MPU Property as Surplus
2. Party Making Request:
Elvira Alonzo, Public Works Director
3. Nature of Request: Public Works staff has a need to declare—as surplus—unusable, inoperable, outdated or otherwise worn out MPU vehicle and property gathered from various departments. These vehicles and property are in different stages of disrepair or obsolete and most have been replaced by new vehicles or equipment.
4. Budgeted:

Bid Amount:	_____	Budgeted Amount:	_____
Under Budget:	_____	Over Budget:	_____
		Amount Remaining:	_____
5. Reimbursement:
6. Routing:

Javier Zamora	Created/Initiated - 4/17/2023
Elvira Alonzo	Approved - 4/17/2023
Mark Vega	Final Approval - 4/19/2023
7. Staff's Recommendation: Public Works recommends approval to declare the described vehicle and property as surplus and begin the disposal of said assets through auctioneering services and/or recycling salvage yards.
8. City Attorney: Approve. IJT
9. MPU General Manager: Approved - MAV
10. Director of Finance for Utilities: Approved - MDC



Memorandum

TO: Mark Vega, P.E., General Manager
FROM: Elvira I. Alonzo, CPM, Public Works Director
DATE: April 14, 2023
SUBJECT: MPU Vehicle & Property Surplus Declaration

Goal: Public Works staff has a need to declare—as surplus—unusable, inoperable, outdated or otherwise worn out MPU vehicles and property gathered from various departments. These vehicles and property are in different stages of disrepair and most have been replaced by new vehicles or equipment.

Explanation: The City of McAllen conducts auctions as needed to dispose of vehicles and equipment that are not economical to repair, have been replaced, or are unsafe to operate. All proceeds are returned to the corresponding fund where the purchase originated (i.e. Water, Waste Water Fund). Attached is a comprehensive list of the MPU vehicles and property including the respective photos of these items proposed for surplus declaration.

Options:

1. The Public Utility Board can defer the sale of the vehicles and property at the risk of significantly lower returns.
2. The Public Utility Board may elect to retain the vehicles and property.

Recommendation: Public Works recommends approval to declare the described vehicles and property as surplus and begin the disposal of said assets through auctioneering services and/or recycling salvage yards.

Please advise if you require additional information. Attached is a list and description of all items being presented for review and consideration.



SURPLUS ROLLING STOCK

APRIL 2023

[illegible]



PU1501



PU1502



PU2008



PU2013



PU1507



PU2504

**CITY OF MCALLEN
EQUIPMENT SURPLUS
APRIL 2023**

DEPARTMENT	PHOTO #	DESCRIPTION	MODEL/SERIAL #	QTY	CONDITION
N. WATER TREATMENT PLANT	NWTP1	KUBOTA MOWER	81915	1	OBSOLETE
N. WATER TREATMENT PLANT	NWTP2	TRAILER	BIG TEX/40SP	1	OBSOLETE
N. WATER TREATMENT PLANT	NWTP3	33 GALLON COMPRESSOR	919.16762	1	OBSOLETE
N. WATER TREATMENT PLANT	NWTP4	MITSUBISHI FORKLIFT	FG18	1	OBSOLETE
WATER LABORATORY	WL01	OFFICE DESK CHAIRS	N/A	3	OBSOLETE
WATER LABORATORY	WL02	FREEZER (WHITE) ASSET# 14132	14132	1	OBSOLETE
WATER LABORATORY	WL03	HIGHBACK OFFIC CHAIR (BLACK)	N/A	2	OBSOLETE
WATER LABORATORY	WL04	EXECUTIVE OFFICE CHAIR WITH ROLLERS (BROWN)	N/A	1	OBSOLETE
WATER LABORATORY	WL05	REFRIGERATOR INST#25	N/A	1	OBSOLETE
WATER LABORATORY	WL06	WATER BATH INST#18	12683	1	OBSOLETE
WATER LABORATORY	WL07	INCUBATOR: IMPERIAL INST#05	18695	1	OBSOLETE
WATER LABORATORY	WL08	HIGHBACK MESH OFFICE CHAIR (BLACK)	N/A	1	OBSOLETE
WATER LABORATORY	WL09	MARKET FORGE AUTOCLAVE STERILIZER	N/A	1	OBSOLETE
WATER LABORATORY	WL10	VENTILATION FAN	N/A	1	OBSOLETE
WATER LABORATORY	WL11	PAPER TOWEL DISPENSER	N/A	1	OBSOLETE
WATER LABORATORY	WL12	FISHER SCIENTIFIC: AB200 ACCUMET PH/CONDUCTIVITY	N/A	1	OBSOLETE
WATER LABORATORY	WL13	METTLER: SEVEN EXCELLENCE PH/CONDUCTIVITY	N/A	1	OBSOLETE
WATER LABORATORY	WL14	CARRYING CASE WITH DR890	N/A	1	OBSOLETE
WATER LABORATORY	WL15	CARRYING CASE FOR POCKET COLORIMETER	N/A	1	OBSOLETE
WATER LABORATORY	WL16	FISHER SCIENTIFIC: PH/ATC EPOXY BODY COMBINATION ELECTRODE	N/A	1	OBSOLETE
WATER LABORATORY	WL17	THERM SCIENTIFIC: STIRRER M:S88854100 S: C24100-11082009477/28919171414	N/A	2	OBSOLETE
UTILITY BILLING	UB01	BLACK CHAIR BACK SUPPORT	N/A	1	OBSOLETE
UTILITY BILLING	UB02	DARK BROWN DOUBLE DOOR CABINETS	N/A	2	OBSOLETE
UTILITY BILLING	UB03	LIGHT BROWN DOUBLE DOOR HUTCH	N/A	1	OBSOLETE
UTILITY BILLING	UB04	BROWN AND BIEGE DESK PARTITION	N/A	1	OBSOLETE
UTILITY BILLING	UB05	BLACK PLEATHER CHAIR W/ROLLERS & ARMS	N/A	1	OBSOLETE
UTILITY BILLING	UB06	BLACK CHAIRS W/ROLLERS & ARMS	N/A	8	OBSOLETE
UTILITY BILLING	UB07	BLACK CHAIR W/ROLLERS & ARMS	N/A	1	OBSOLETE

DEPARTMENT	PHOTO #	DESCRIPTION	MODEL/SERIAL #	QTY	CONDITION
UTILITY BILLING	UB08	RED DOLLY	N/A	1	OBSOLETE
METER READERS	MR01	42" INSIGNIA TV	DXAC5YA010899	1	OBSOLETE
METER READERS	MR02	DESK CHAIRS	N/A	3	OBSOLETE
METER READERS	MR03	PA SYSTEM	PWMA-9301	1	OBSOLETE
METER READERS	MR04	METAL DETECTOR	M-97	1	OBSOLETE
METER READERS	MR05	OFFICE CHAIRS	N/A	4	OBSOLETE
METER READERS	MR06	MICELLANEOUS RUBBER BOOTS (PAIRS)	N/A	3	OBSOLETE
METER READERS	MR07	MICELLANEOUS WATER THERMOS	N/A	5	OBSOLETE
METER READERS	MR08	LOUNGE CHAIR	N/A	1	OBSOLETE
METER READERS	MR09	LOUNGE SOFA	N/A	1	OBSOLETE
METER READERS	MR10	BROKEN SHOVELS /HANDLES	N/A	14	OBSOLETE
METER READERS	MR11	METER READING TUBES	N/A	10	OBSOLETE
METER READERS	MR12	HAND PUMPS	N/A	11	OBSOLETE
METER READERS	MR13	MISCELLANEOUS HAND TOOLS (PRUNNERS)	N/A	5	OBSOLETE
METER READERS	MR14	SMALL PLASTIC TOOL BOX	N/A	1	OBSOLETE
METER READERS	MR15	OFFICE DESK	N/A	1	OBSOLETE
METER READERS	MR16	OFFICE DESK	N/A	1	OBSOLETE
METER READERS	MR17	OFFICE DESK	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD01	CABINET	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD02	CONFERENCE TABLE	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD03	L SHAPE DESK	N/S	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD04	MISCELLANEOUS CABINET	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD05	OFFICE DESK	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD06	OFFICE HUTCH	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD07	TAMPING MACHINE (CITY OF MCALLEN TAG 20599)	MIKASA /A9068	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD08	WATER PUMP (YELLOW)	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD09	PORTABLE WORK LIGHTS	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD10	WATER PUMP (GRAY)	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD11	ICE MACHINE (CITY OF MCALLEN TAG 19383)	B570/SN 1101198749	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD12	HOMELITE GENERATOR	EH4400/SN HJ2510125	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD13	WATER PUMP	N/A	2	OBSOLETE

DEPARTMENT	PHOTO #	DESCRIPTION	MODEL/SERIAL #	QTY	CONDITION
TRANMISSION & DISTRIBUTION	TD14	WATER PUMP	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD15	CHOP SAW	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD16	PARTS TO SAW	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD17	WATER PUMP	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD18	SCHUMACHER BATTERY CHARGER	SE4822 / N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD19	HITCH TRAILER	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD20	TRUCK BED TOOL BOX	N/A	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD21	AIR COMPRESSER	S/N 6120805	1	OBSOLETE
TRANMISSION & DISTRIBUTION	TD22	WATER PUMP	N/A	3	OBSOLETE
SEWER ADMINISTRATION	WA01	DRONE AND CASE	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA02	SPEAKERS	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA03-04	GPS - OBSOLETE	R8 GNSS/R6/ 5800	1	OBSOLETE
SEWER ADMINISTRATION	WA05	EMPTY DJI PHANTOM DRONE CASE	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA06	TRIMBLE CHARGE CORD	Part No. 62546	1	OBSOLETE
SEWER ADMINISTRATION	WA07	XXL SAFETY JACKET	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA08-09	LAPTOP BAG	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA10	CART FOR PLANS	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA11-12	CAMERA WITH BAG	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA13-14	BOOK CASE WITH THREE SHELVES	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA15-16	CART	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA17-21	OLD LAPTOP WITH BAG	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA22-23	KEYBOARD	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA24	CORKBOARD	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA25	BROKEN GIS ROD	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA26-28	HP DESIGN JET T830 PLOTTER - PRINT BROKEN/SCAN FUNCTION WORKS	N/A	1	OBSOLETE
SEWER ADMINISTRATION	WA29	DESKTOP CONNECTOR (18" X 6')	N/A	1	OBSOLETE
				147	ITEMS



NWTP1



NWTP2



NWTP3



NWTP4



WL01



WL02



WL03



WL04



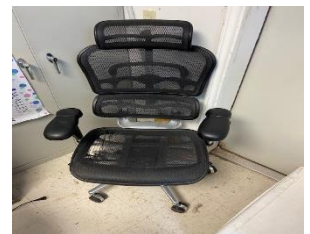
WL05



WL06



WL07



WL08



WL09



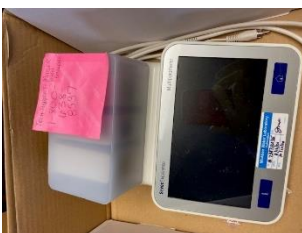
WL10



WL11



WL12



WL13



WL14



WL15



WL16



WL17



UB01



UB02



UB03



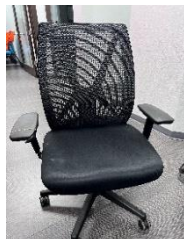
UB04



UB05



UB06



UB07



UB08



MR01



MR02



MR03



MR04



MR05



MR06



MR07



MR08



MR09



MR10



MR11



MR12



MR13



MR14



MR15



MR16



MR17



TD01



TD02



TD03



TD04



TD05



TD06



TD07



TD08



TD09



TD10



TD11



TD12



TD13



TD14



TD15



TD16



TD17



TD18



TD19



TD20



TD21



TD22



WA01



WA02



WA03



WA04



WA05



WA06



WA07



WA08



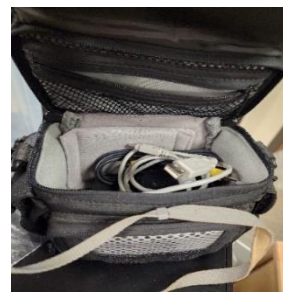
WA09



WA10



WA11



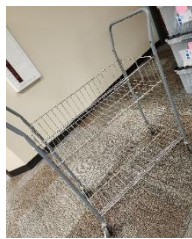
WA12



WA13



WA14



WA15



WA16



WA17



WA18



WA19



WA20



WA21



WA22



WA23



WA24



WA25



WA26



WA27



WA28



WA29



AGENDA ITEM

3.e.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/19/2023

MEETING DATE

4/25/2023

1. Agenda Item: Reuse Master Plan Update Project:Professional Services Amendment # 2

**2. Party Making Request:
Carlos Gonzalez, Development and Special Projects Engineer**

3. Nature of Request: Consideration and Approval of Professional Services Amendment # 2 corresponding to Plummer Associates and Reuse Master Plan Update Project.03-20-S30-5362

4. Budgeted: No

**Bid Amount: \$170,342
Under Budget: \$0.00**

**Budgeted Amount: \$0.00
Over Budget: \$170,342
Amount Remaining: \$0.00**

5. Reimbursement:

**6. Routing:
Carlos Gonzalez Created/Initiated - 4/19/2023
Gerardo Noriega Final Approval - 4/19/2023**

7. Staff's Recommendation: Staff recommends approval of Professional Services Amendment # 2 as proposed and summarized in accompanying agenda packet documents.

8. City Attorney: Approve. IJT

9. MPU General Manager: Approved - MAV

10. Director of Finance for Utilities: Approved - MDC

Memo

TO: Marco A. Vega, P.E., General Manager
J.J. Rodriguez, Asst. General Manager

FROM: Carlos Gonzalez, P.E., Utility Engineer

DATE: April 19, 2023

SUBJECT: Professional Services Amendment No. 2; Plummer – Reuse Master Plan Update; Project No. PN: 03-20-S30-532

Plummer is requesting Amendment No. 2 to the Professional Services Contract for the Reuse Master Plan Update Project. Specifically, this amendment will serve to address a time extension as well as incorporate additional Scope of Services. The following is a brief summary of changes:

- The Contract included a completion date of March 31, 2023. Plummer was delayed in completing final report largely due to Staff initiated requests to consider the viability of providing Reuse water to a prospective Industry in South McAllen. The Proposed Amendment will set a completion date of September 30, 2023.
- The additional Scope of Service will include additional detailed analysis needed to evaluate impacts of a potential new industry specific waste-stream at our South WWTP. The amendment will add a “Not to Exceed” amount of \$170,342 to original base contract of \$288,135 yielding a new “not-to-exceed” total contract amount of \$458,477.

A copy of detailed Scope Proposal, including deliverables, is attached. Note that approving this amendment will require a Budget Amendment this FY.

Staff is respectfully requesting Board Approval for both the extension of contract time as well as the Additional Scope of Service and corresponding additional fees as proposed. A budget amendment would be brought forth for approval at a subsequent Board Meeting.

Staff will be available for comments or questions.

**AMENDMENT NO. 2
TO CONTRACT AGREEMENT FOR ENGINEERING SERVICES
BETWEEN MCALLEN PUBLIC UTILITY
AND
Plummer
FOR
Reuse Master Plan Update**

THIS AMENDMENT NO. 2 is made as of _____ between McAllen Public Utility (OWNER) and Plummer Associates, Inc. (ENGINEER) related to the Reuse Master Plan Update in Hidalgo County, Texas (the PROJECT).

OWNER and ENGINEER in consideration of their mutual covenants herein agree in respect of the performance of professional engineering services by ENGINEER and the payment of those services by OWNER as set forth below.

WHEREAS, the OWNER and the ENGINEER executed the original Contract Agreement between Owner and Engineer for Engineering/Professional Services on December 3, 2020 and Professional Services Amendment # 1 on September 15, 2022.

WHEREAS, it has become necessary to amend the contract to increase the contract time as well as to incorporate additional Scope of Services and provide a corresponding fee change.

NOW, THEREFORE, premises considered, the OWNER and ENGINEER agree that said Agreement is amended to include the following Contract modifications:

Revise Part II – Engineering Fees as follows:

The maximum amount payable under this agreement without modification is \$458,477.

Revise Part III – Term of Agreement" as follows:

Modify contract expiration date from March 31, 2023 to September 30, 2023.

Revise Part V – Terms and Conditions as follows:

Incorporate the Attached document as a supplemental Scope of Service

IN WITNESS WHEREOF, the parties hereto have made and executed this Amendment as the day and year first above written.

OWNER:
McALLEN PUBLIC UTILITY

ENGINEER:
PLUMMER ASSOCIATES, INC

MARCO A VEGA, P.E. DATE
General Manager

***** , P.E., DATE
Principal

ATTEST:

ATTEST:

J.J. RODRIGUEZ DATE
Asst. General Manager
Interim Board Secretary

DATE

APPROVED AS TO FORM:

ISAAC TAWIL DATE
City Attorney

REVIEWED BY:

GERARDO NORIEGA DATE
Director of Purchasing and Contracting

EXHIBIT A
McAllen Public Utility
Water Reuse Master Plan- Amendment #2
Scope of Work

Background

Plummer is currently providing professional services to McAllen Public Utility (MPU) to update its water reuse master plan. Recent interest from an industry to locate a microchip manufacturing facility in South McAllen has resulted in the need to perform a preliminary engineering evaluation of providing this potential customer with reclaimed water. Initial information from the potential customer indicates that they could use most or all of the available reclaimed water supply from MPU's South Wastewater Treatment Plant (WWTP). In addition, although the customer's facilities will be located in the City of Mission's CCN, Mission has indicated that they do not have capacity to treat the wastewater from the customer and they are open to allowing MPU to provide treatment. Therefore, MPU needs to evaluate impacts to their wastewater treatment capacity, potential pretreatment requirements, and the impact to reclaimed water quality if they were to treat the waste from the customer. This scope of work outlines general tasks associated with providing MPU with information needed to evaluate the initial feasibility of serving this customer.

Basic Services

Task A: Determine Reclaimed Water Quantity, Quality and Delivery Requirements

1. Plummer will participate in meetings with MPU and the potential industrial customer to determine:
 - a) reclaimed water supply requirements (i.e., annual average, maximum day, peak hour demands);
 - b) any specific water quality requirements;
 - c) desired point(s) of delivery to the industry property; and
 - d) how much (if any) reclaimed water storage will be provided on-site at the industrial facility.

Task B: Reclaimed Water Storage Pond

1. Determine available reclaimed water supply: Based on information developed in the Reclaimed Water Master Plan, determine the current and future reclaimed water supply available from the South WWTP.
2. Determine needed storage volume: Based on information from Task A and Task B1, determine the volume of storage needed to serve the industrial customer. If a pond is determined to be needed and feasible, it is assumed that it will be located on City property north of the WWTP. A depth and area of pond will be assumed for purposes of developing costs. In the absence of any

site-specific geotechnical data and for purposes of developing costs, it will be assumed that clay will need to be imported to the site to provide the required liner permeability for a Type II reclaimed water storage pond.

Task C: Reclaimed Water Delivery System

1. Delivery from plant to onsite storage pond or storage basins: Plummer will evaluate alternatives for delivery of reclaimed water to the existing re-purposed clarifier basins and/or a reclaimed water storage pond. If a storage pond is needed, use of the existing gravity line to the Palm View Golf Course may be evaluated as one alternative.
 - a. Evaluate hydraulics to determine if the existing gravity pipe serving Palm View Golf Course can be used to convey water to the pond.
 - b. If the existing gravity line cannot be used, determine the pipe size and pump capacity needed for conveying the water from the plant point of discharge to the pond.
2. Delivery to industrial customer:
 - a. Plummer will assume an alignment to the industrial customer with input from MPU staff and industry's consultant.
 - b. Plummer will develop a hydraulic model of the delivery system from the reclaimed water storage pond or storage basin to the industrial customer and use the model to evaluate pump sizing. It is assumed that the industry's consultant will evaluate the sizing and conceptual design of the reclaimed water pipeline. Plummer will coordinate with industry's consultant to obtain necessary hydraulic information to determine necessary pump sizing.
3. Conceptual costs: Plummer will prepare an opinion of probable construction cost (OPCC) for the conceptual plan, including the delivery system from the treatment plant to the reclaimed water pond, the reclaimed water pond, and the delivery system to the industrial customer. The OPCC will be Class 5 AACE classification system level.

Task D: Wastewater Treatment Assessment

1. Wastewater flow projections and quality characterization:
 - a. Determine projected wastewater flow quantity and quality in collaboration with the industrial customer. Develop a list of anticipated constituents and prepare a data request to determine expected wastewater quality from the customer. Summarize water quality data provided by the customer, including any supplemental data needs.
 - b. Review historical quality and flow data from the South WWTP, including BOD, ammonia, TSS and pH.
 - c. Review available reports and information related to capacity of treatment processes and planned improvements at the South WWTP.
 - d. Identify water quality characteristics from the industry waste stream that may impact the current and potential future treatment process and/or TPDES permit compliance at the South WWTP.
 - e. Coordinate with the industrial customer to determine any proposed pretreatment by the industry and the associated wastewater quality impacts.

- f. Coordinate with the industrial customer to understand potential opportunities for wastewater flow segregation to support optimized treatment.
 - g. Characterize the projected future raw wastewater quality (or pretreated wastewater quality pending item e). Define concentrations and loads. Loads will include annual average daily; maximum month average daily; peak two-hour; and average daily minimum.
 2. Wastewater treatment evaluation:
 - a. Perform a process evaluation and assessment to determine the impact of the industrial waste on the existing treatment process capacity. This will include steady state modeling of the facility based on future loading conditions, as defined in subtask D.1.d and D.1.e.
 - b. Develop recommendations for modifications and/or expansion of the treatment process to adequately treat the combined municipal and industrial wastewater, including process changes, basin expansion, addition of redundant units, etc. as necessary to meet effluent discharge requirements as defined in the TPDES permit. A dedicated industrial treatment facility may also be a desirable solution and may be considered depending on the outcome of the water quality assessment.
 - c. Identify potential impacts of treating the industrial waste on TPDES permit compliance.
 - d. Identify potential impacts to MPU's pretreatment program and make initial recommendations for any modifications to the pretreatment program. It is assumed that modifications to existing permits will not be included as part of this evaluation, so no evaluation of existing customer loads will be included.
 - e. Evaluate potential impacts of the industrial waste on reclaimed water quality. This will include defining potential reuse alternatives that could be implemented using various treatment processes defined in this subtask.
 3. Conceptual costs: Prepare an opinion of probable construction cost (OPCC) for conceptual-level improvements identified in Task D2.b above.

Task E: Chapter 210 Reclaimed Water Authorization Amendment

1. Amendment application: Prepare a map showing the proposed revised service area for MPU's Chapter 210 authorization. Prepare an amendment application that includes the revised service area. Confirm that the current 210 authorization includes the appropriate use for the potential industrial customer.
2. Amendment processing: Submit the amendment to the TCEQ and provide support for processing of the amendment.

Task F: Project Administration and Meetings

1. Project Administration: Project administration will include, but not be limited to, tracking and managing internal schedules of work; monitoring and addressing issues related to the scope of work, budget and deliverables; preparing and processing monthly billings; providing labor resources necessary to fulfill scoped work; scheduling and participating in quality control reviews; and providing updates to MPU on a regular basis.

2. Meetings: Virtual meetings will be held on an as-needed basis to support the project and ensure frequent communications. Plummer will be available to attend in-person meetings as required to meet with MPU staff or Board.

Task G: Other Services

1. Other services will be performed as agreed on with MPU to evaluate other project issues that may arise.

Assumptions

1. The results of Tasks A-D will be provided in the form of summaries on Powerpoint slides. No formal technical memorandum will be provided.
2. Utility conflicts, environmental permitting issues, property ownership and other similar alignment issues will not be assessed as part of this evaluation.
3. OPCCs will be developed for AACE Class 5.

Schedule

It is anticipated that the Basic Services will be completed within 4 months of Notice to Proceed.

Compensation

Compensation for Basic Services will be on a time and materials basis per the attached rate schedule with a not-to-exceed amount of \$170,342. An estimated cost by task is provided below:

Task	Description	Fee
A	Determine RW quantity, quality and delivery reqts	\$ 4,560
B	Reclaimed water storage pond	\$ 23,236
C	Reclaimed water delivery system	\$ 27,391
D	Wastewater treatment assessment	\$ 63,651
E	Chapter 210 authorization amendment	\$ 7,270
F	Project administration and meetings	\$ 29,235
G	Other services	\$ 15,000
	TOTAL	\$ 170,342



AGENDA ITEM

5.a.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/19/2023

MEETING DATE

4/25/2023

1. Agenda Item: Consultation with City Attorney regarding pending litigation before the PUC (T.G.C. 551.071)

2. Party Making Request:

3. Nature of Request:

4. Budgeted:

Bid Amount: _____
Under Budget: _____

Budgeted Amount: _____
Over Budget: _____
Amount Remaining: _____

5. Reimbursement:

6. Routing:

Savannah Arredondo

Created/Initiated - 4/19/2023

7. Staff's Recommendation:

8. City Attorney: None. IJT

9. MPU General Manager: N/A - MAV

10. Director of Finance for Utilities: N/A - MDC



AGENDA ITEM

5.b.

PUBLIC UTILITY BOARD

DATE SUBMITTED

04/19/2023

MEETING DATE

4/25/2023

1. Agenda Item: Discussion and possible lease, sale or purchase of Real Property, Tract 1 (Section 551.02, T.G.C).

2. Party Making Request:

3. Nature of Request:

4. Budgeted:

Bid Amount: _____
Under Budget: _____

Budgeted Amount: _____
Over Budget: _____
Amount Remaining: _____

5. Reimbursement:

6. Routing:
Savannah Arredondo

Created/Initiated - 4/19/2023

7. Staff's Recommendation:

8. City Attorney: None. IJT

9. MPU General Manager: N/A - MAV

10. Director of Finance for Utilities: N/A - MDC