#### The Florida Senate

#### **COMMITTEE MEETING EXPANDED AGENDA**

#### COMMUNITY AFFAIRS Senator Lee, Chair Senator Clemens, Vice Chair

MEETING DATE: Tuesday, October 24, 2017

**TIME:** 9:00—10:30 a.m.

PLACE: 301 Senate Office Building

**MEMBERS:** Senator Lee, Chair; Senator Clemens, Vice Chair; Senators Bean, Brandes, Campbell, Perry,

Rodriguez, and Simmons

TAB	BILL NO. and INTRODUCER	BILL DESCRIPTION and SENATE COMMITTEE ACTIONS	COMMITTEE ACTION
1	Wrap-up of the Workshop on State Testimony	and Local Regulation of Vacation Rentals - Public	Discussed
2	SB 192 Baxley (Similar H 79)	Public Meetings; Specifying conditions under which members of any board or commission of any state agency or authority or of any agency or authority of any county, municipal corporation, or political subdivision may participate in fact-finding exercises or excursions, etc.  EE 10/10/2017 Favorable CA 10/24/2017 Favorable	Favorable Yeas 7 Nays 0
		RC	
3	SB 272 Brandes (Identical H 317)	Local Tax Referenda; Providing that a municipality may increase the millage rate of ad valorem taxes levied on real and tangible personal property only by a vote of a specified percentage of the municipality's governing body approving the increase; revising the voter approval threshold required to pass a referendum to adopt or amend local government discretionary sales surtaxes when the referendum is held at any date other than a general election, etc.	Fav/CS Yeas 6 Nays 1
		CA 10/24/2017 Fav/CS AFT AP RC	
4	Presentation by the Office of Program Analysis and Governmental Accountability on Community Redevelopment Agencies		Temporarily Postponed
5	Presentation by the Auditor General on Report No. 2015-037, Local Government Financial Reporting System, Community Redevelopment Agencies		Temporarily Postponed
	Other Related Meeting Documents		

## **APPEARANCE RECORD**

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

October 24, 2017

Meeting Date			Bill Number (if applicable)
Topic State and Local Regulations or	ı Vacation Rentals - Pu	blic Testimony	Amendment Barcode (if applicable)
Name Patricia Detwiler			runchament barbode (ii applicable)
Job Title Executive Director			
Address 166 Ramblewood Circle	)		Phone 863.781.2749
Street Royal Palm Beach	FL	33411	Email FloridaBedandBreakfastInns@gmail.com
City Speaking: For Against	State  Information	Zip Waive S <sub>i</sub> (The Chai	
Representing Florida Bed and	d Breakfast Inns As	sociation	
Appearing at request of Chair:	✓Yes No	Lobbyist registe	ered with Legislature: Yes No
While it is a Senate tradition to encourage meeting. Those who do speak may be a	ge public testimony, tim sked to limit their rema	e may not permit all rks so that as many	persons wishing to speak to be heard at this persons as possible can be heard.

## APPEARANCE RECORD

October 24, 2017 (Deliver BOTH copies of this form to the Senate	or or Senate Professional S	Staff conducting the meeting)
Meeting Date		NA
Topic Wrap-up of Workshop on State & Local Regulation of	of Vacation Rentals	Bill Number (if applicable) NA
Name Greg Hansen		Amendment Barcode (if applicable)
Job Title County Commissioner of Flagler County		
Address 1769 E Moody Blvd #2 Street		Phone 386-313-4001
Bunnell FL City State	32110 Zip	Email ghansen@flaglercounty.org
Speaking: ForAgainst Information	Waive Sp (The Chair	peaking: In Support Against will read this information into the record.)
Representing Flagler County Board of County Comm	nissioners	
Appearing at request of Chair: Yes Vo	Lobbyist registe	red with Legislature: Yes ✓ No
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# **APPEARANCE RECORD**

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Topic VACATION RENTALS	Bill Number (if applicable)
Name RICK BHULA	Amendment Barcode (if applicable)
Job Title OWNER/MANAGER	
Address 2020 APALACHEE PKWY TH	Phone 850 766 580 8
Against Information Waive Spea	Email RKBHULA @ GMAIL  com  aking: In Support Against
Representing HOTEL INDUSTRY	rill read this information into the record.)
Appearing at request of Chair: Yes No Lobbyist registere	d with Legislature:
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Meeting Date (Deliver BOTH copies of this form to the Senator or S	Senate Professional Staff conducting the meeting)
Topic Shert-Tern Rentels	Bill Number (if applicable)
Name_TRAVIS MOORE	Amendment Barcode (if applicable)
Job Title	
Address P.O. Box 7070  Street  St. Petersburg FC 3.  City State	Phone 777.471.6902  3731 Email + raws a moore - lelations, con
Speaking: For Against Information	Waive Speaking: In Support
Representing Community Associations Institute Appearing at request of Chair: Yes No Lot	tufe Ocean Hananack Co. O
	is registered with Ledislature. It was the
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Meeting Date	he Senator or Senate Professional Staff conducting the meeting)
Topic VACATION RENTAL	Bill Number (if applicable)
Name HEATHER BEAVEN	Amendment Barcode (if applicable)
Job Title Flankian	
Address 1444 5. CENTRAL	AVC Phone
SLAG (on BEACH	CI = 23(3)
Speaking: For Against Information	Zip Zip Zinan // MSED VEN (OCMA) L.
Representing	Waive Speaking: In Support Against (The Chair will read this information into the record.)
Appearing at request of Chair: Yes No	Lobbyist registered with Legislature: Yes No
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Topic MACATION RONTALS	Bill Number (if applicable)
Name_Jannifan Owacan	Amendment Barcode (if applicable)
Job Title	
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Speaking: State Zip	mail
Representing HOMARWAY & AXPANA	king: In Support Against I read this information into the record.)
Appearing at request of Chair: Yes No Lobbyist register	
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# **APPEARANCE RECORD**

Meeting Date (Deliver BOTH copies of this form to the Set	ANCE RECORD  nator or Senate Professional Staff conducting the meeting)
Topic SHORT TERM RENTA	Bill Number (if applicable)
Name Douglas BEAVEN	Amendment Barcode (if applicable)
Job Title Dung	
Address A44 S CONRAL AVE  Street  City  State  Speaking: For Against Information	Phone 386 627-3376  37136 Email  Zip  Waive Speaking: In Support Against (The Chair will read this information into the record.)
Representing _SGZF	
Appearing at request of Chair: Yes No	Lobbyist registered with Legislature: Yes
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# **APPEARANCE RECORD**

Meeting Date (Deliver BOTH copies of this form to the Sena	NCE RECORD tor or Senate Professional Staff conducting the meeting)
Topic Vacation   Short term renta	Bill Number (if applicable)
Name Annetty Massey	Amendment Barcode (if applicable)
Job Title Selfendoned	
Address 2657 annette Street	Dhan On t
city Flagler Beach FL	32136 Phone 386 852-2217
Speaking: For Against Information	Zip Email mooremassey me
·····o///atto//	Waive Speaking: In Support Against (The Chair will read this information into the record.)
Representing <u>Self</u>	
Appearing at request of Chair: Yes No	Lobbyist registered with the
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# **APPEARANCE RECORD**

APPEARANCI  (Deliver BOTH copies of this form to the Senator or Ser  Meeting Date	ERECORD nate Professional Staff conducting the meeting)
Topic Shart-term Rental	Bill Number (if applicable)
Name_hisa A. Robertson	Amendment Barcode (if applicable)
Job Title HOST	
Address 88 Rell Are Orive  Street Dlsh'n Floring  City State  Speaking: For Against Information  Representing Ar Br B	Phone (\$57) 737-022 (  Email   ISAT   ISAT   STATE    Zip
Appearing at request of Chair: Yes No Lobb  While it is a Senate tradition to encourage public testimony, time may no meeting. Those who do speak may be asked to limit their remarks so the This form is part of the public record for this meeting.	yist registered with Legislature: Yes No of permit all persons wishing to speak to be heard at this at as many persons as possible can be heard.

## **APPEARANCE RECORD**

Meeting Date  (Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)
Bill Number (if applicable)
Topic Short-term rental
NameMANL Robertson
Job Title Don't Stead Property Univer and Putined mis lithing
Address 371 Kell Airc Ord Phone 750-461-3665
Olstin Fr 3254)  City State Zip Email_mrubeAsen406@icloud.
Speaking: For Against Information Waive Speaking: In Support Against  (The Chair will read this information into the record.)
Representing AT BNB
Appearing at request of Chair: Yes No Lobbyist registered with Legislature: Yes No
While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.
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Meeting Date	Bill Number (if applicable)
Topic Short term sontals	Amendment Barcode (if applicable)
Name Stephanie Hardisty	(**************************************
Job Title <u>Selfemployeed</u>	
Address 1 Ocane West Stett	17B6 Phone 380-606-9773
City Hona Boach FLA	= 32118 Email Stophardisty
Speaking: For Against Information	Waive Speaking: In Support Against (The Chair will read this information into the record.)
Representing Short term ranto	als owners in Daytona
Appearing at request of Chair: Yes No	Lobbyist registered with Legislature: Yes No
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## **APPEARANCE RECORD**

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Topic VACATIUN RE	WTALS		Amendment Barcode (if applicable)
Name CHRISTOPHER	EMMANUEL	and the same of th	
Job Title Policy Dia	LECTOR		_
Address 136 BRUN	DUUGH STREET	<b>b</b>	Phone
City	FL 3	2301 Zip	Email CEMMANUED @FLCHAMBE
Speaking: For Against	Information	Waive S	peaking: In Support Against air will read this information into the record.)
Representing FLORIS	PA CHAMBER	and the same of th	DIMERCE
Appearing at request of Chair: [	Yes No	Lobbyist regist	tered with Legislature: Yes No
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### **APPEARANCE RECORD**

Meeting Date (Deliver BOTH copies of this form to the Senator or Senate Professional S	Bill Number (if applicable)
Name ON ID BRIGHTUL	Amendment Barcode (if applicable)
Job Title Consultation  Address 1208 Stephen Street  Street Allahouse PL 3230 S  City State Information Waive S	Phone 850 576 9574  Email day id. 0 15 holds  Peaking: In Support Against
Representing	tered with Legislature: Yes 🟋 'No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

This form is part of the public record for this meeting.

S-001 (10/14/14)

## The Florida Senate BILL ANALYSIS AND FISCAL IMPACT STATEMENT

(This document is based on the provisions contained in the legislation as of the latest date listed below.)

	Prepare	d By: The F	Professional Staff	of the Committee	on Community Affairs
BILL:	SB 192				
INTRODUCER:	Senator Ba	ıxley			
SUBJECT:	Public Med	etings			
DATE:	October 23	3, 2017	REVISED:		
ANAL	YST	STAF	F DIRECTOR	REFERENCE	ACTION
1. Carlton		Ulrich		EE	Favorable
2. Cochran		Yeatm	an	CA	Favorable
3.				RC	

#### I. Summary:

SB 192 revises Florida's "Government in the Sunshine Law", or "Sunshine Law," by codifying judicial interpretation and application of s. 286.011, F.S. Specifically, the bill provides from jurisprudence definitions for the terms: "de facto meeting," "discussion," "meeting," "official act," and "public business." The bill also provides guidelines for boards to conduct permissible fact-finding exercises or excursions. Finally, the bill provides in statute that notice is not required when two or more members of a board are gathered if no official acts are taken and no public business is discussed.

#### II. Present Situation:

#### **Open Meetings Laws**

The Florida Constitution provides that the public has a right to access governmental meetings. <sup>1</sup> Each collegial body must provide notice of its meetings to the public and permit the public to attend any meeting at which official acts are taken or at which public business is transacted or discussed. <sup>2</sup> This applies to the meetings of any collegial body of the executive branch of state government, counties, municipalities, school districts, or special districts. <sup>3</sup>

<sup>&</sup>lt;sup>1</sup> FLA. CONST., art. I, s. 24(b).

 $<sup>^{2}</sup>$  Id

<sup>&</sup>lt;sup>3</sup> Fla. CONST., art. I, s. 24(b). Meetings of the Legislature are governed by Article III, section 4(e) of the Florida Constitution, which states: "The rules of procedure of each house shall further provide that all prearranged gatherings, between more than two members of the legislature, or between the governor, the president of the senate, or the speaker of the house of representatives, the purpose of which is to agree upon formal legislative action that will be taken at a subsequent time, or at which formal legislative action is taken, regarding pending legislation or amendments, shall be reasonably open to the public."

The Florida Statutes also provide that governmental meetings must be open to the public. Section 286.011, F.S., which is also known as the "Government in the Sunshine Law," or the "Sunshine Law," requires all meetings of any board or commission of any state or local agency or authority at which official acts are to be taken be open to the public. The board or commission must provide the public reasonable notice of such meetings. A failure to abide by open meetings requirements will invalidate any resolution, rule or formal action adopted at a meeting. The minutes of a board or commission meeting also must be made available to the public. A public officer or member of a governmental entity who violates the Sunshine Law is subject to civil and criminal penalties. Description of the public of

The Legislature may create an exemption to open meetings requirements by passing a general law by a two-thirds vote of each house. <sup>11</sup> An exemption must explicitly lay out the public necessity justifying the exemption, and the exemption must be no broader than necessary to accomplish the stated purpose of the exemption. <sup>12</sup>

#### Who is Subject to the Sunshine Law?

Article I, s. 24(b) of the Florida Constitution, in pertinent part, provides that meetings of the following bodies must be open and noticed to the public:

[A]ny collegial public body of the executive branch of state government or of any collegial public body of a county, municipality, school district, or special district, at which official acts are to be taken or at which public business of such body is to be transacted or discussed.

Furthermore, s. 286.011, F.S., provides, in relevant part, that all meetings of the following entities must be open to the public:<sup>13</sup>

[A]ny board or commission of any state agency or authority or of any agency or authority of any county, municipal corporation, or political subdivision, ... including meetings with or attended by any person elected to such board or commission, but who has not yet taken office, at which official acts are to be taken are declared to be public meetings.

The Sunshine Law applies to "[m]embers-elect of boards, commissions, agencies, etc." as soon as they are elected, even if they have not yet been sworn into office. <sup>14</sup> Any assemblage of members-elect or elected members of a collegial body who "discuss matters on which

<sup>&</sup>lt;sup>4</sup> Times Pub. Co. v. Williams, 222 So. 2d 470, 472 (Fla. 2d DCA 1969).

<sup>&</sup>lt;sup>5</sup> Board of Public Instruction of Broward County v. Doran, 224 So. 2d 693, 695 (Fla. 1969).

<sup>&</sup>lt;sup>6</sup> Section 286.011(1)-(2), F.S.

<sup>&</sup>lt;sup>7</sup> *Id*.

<sup>&</sup>lt;sup>8</sup> *Id*.

<sup>&</sup>lt;sup>9</sup> Section 286.011(2), F.S.

<sup>&</sup>lt;sup>10</sup> Section 286.011(3), F.S.

<sup>&</sup>lt;sup>11</sup> FLA. CONST., art. I, s. 24(c).

<sup>12</sup> *Id* 

<sup>&</sup>lt;sup>13</sup> Not all meetings must be noticed to the public according to s. 286.011(1), F.S.; only board or commission meetings must be reasonably noticed.

<sup>&</sup>lt;sup>14</sup> *Hough v. Stembridge*, 278 So. 2d 288, 289 (Fla. 3d DCA 1973).

foreseeable action may be taken by that board or commission" constitutes a meeting subject to the Sunshine Law. 15

The Sunshine Law has broad application, even to entities that are not normally considered a government body. Case law provides that a university is subject to the Sunshine Law, even if it is not usually considered a state agency. Therefore, since a university is subject to the Sunshine Law, any committee it delegates its powers to must also hold its meetings publicly. The subject to the Sunshine Law, any committee it delegates its powers to must also hold its meetings publicly.

Florida courts have held that the intent behind the Sunshine Law is to provide public access to the entire decision-making process, because it is the "how and why" public officials decided to act which interests the public, not merely the final decision. Accordingly, if a government collegial body delegates its decision-making powers to another group, then those meetings must be public, even if the group is formed of private citizens. 19

#### What is a "Meeting" that Should be Held in the Sunshine?

The Legislature has not defined the term "meeting" within the context of the Sunshine Law. However, the courts have. In *Sarasota Citizens for Responsible Gov't v. City of Sarasota* the Florida Supreme Court stated:

[M]eetings within the meaning of the Sunshine Law include any gathering, formal or informal, of two or more members of the same board or commission where the members deal with some matter on which foreseeable action will be taken by the Board.<sup>20</sup>

The Court has also interpreted the intent of the Sunshine Law in relation to the types of assemblages that constitute a "meeting":

The obvious intent of the Government in the Sunshine Law, supra, was to cover any gathering of some of the members of a public board where those members discuss some matters on which foreseeable action may be taken by the board.<sup>21</sup>

A meeting, within the meaning of the Sunshine Law, can occur even if the members of a collegial body do not speak to each other about a topic where foreseeable action may take place. Courts have ruled that the *opportunity* to make a decision was sufficient to make a gathering of school officials a public meeting.<sup>22</sup> In one case, school board members, two school board candidates, a superintendent and his deputy, and members of the press, toured new school bus routes on a school bus. The school board members sat several rows away from each other as a precaution and none of the members discussed preferences, expressed opinions or voted on the bus trip.<sup>23</sup> Despite taking those precautions, the court opined that the school board "had ultimate decision-making authority," gathered in a confined space, and had "the opportunity at that time

<sup>&</sup>lt;sup>15</sup> Hough v. Stembridge, 278 So. 2d 288, 289 (Fla. 3d DCA 1973).

<sup>&</sup>lt;sup>16</sup> Wood v. Marston, 442 So. 2d 934 (Fla. 1983).

<sup>17</sup> Id

<sup>&</sup>lt;sup>18</sup> Times Publishing Company v. Williams, 222 So. 2d 470, 473 (Fla. 2d DCA 1969).

<sup>&</sup>lt;sup>19</sup> Palm Beach v. Gradison, 296 So. 2d 473 (Fla. 1974).

<sup>&</sup>lt;sup>20</sup> Sarasota Citizens for Responsible Gov't v. City of Sarasota, 48 So. 3d 755 (Fla. 2010).

<sup>&</sup>lt;sup>21</sup> Bd. of Pub. Instruction v. Doran, 224 So. 2d 693 (Fla. 1969).

<sup>&</sup>lt;sup>22</sup> Finch v. Seminole County Sch. Bd., 995 So. 2d 1068 (Fla. 5th DCA 2008).

<sup>&</sup>lt;sup>23</sup> *Id*.

to make decisions outside of the public scrutiny." Therefore, the court held that the bus ride was a meeting that violated the Sunshine Law.<sup>24</sup>

A "sunshine meeting" may also occur even if the members of a board do not assemble or share information through an intermediary. In this case, a superintendent met individual school board members in succession to discuss redistricting, but denied acting as a "go-between" or sharing the opinions of one board member with another one. <sup>25</sup> Although board members did not exchange information or otherwise congregate, the court in finding a violation of the Sunshine Law, held:

The scheduling of six sessions of secret discussions, repetitive in content, in rapid-fire seriatim and of such obvious official portent, resulted in de facto meetings by two or more members of the board at which official action was taken.<sup>26</sup>

Any meeting when public officials meet to avoid being seen or heard by the public violates the Sunshine Law, regardless of whether that meeting is formal or informal.<sup>27</sup> The judiciary has advised, "[i]f a public official is unable to know whether by convening two or more officials he is violating the law, he should leave the meeting forthwith."<sup>28</sup>

Not all meetings of government officials are subject to the Sunshine Law, and the presence of two government officials alone is not sufficient to require a public meeting. <sup>29</sup> In addition to the exemptions listed in statute, staff meetings and fact-finding meetings are exceptions to the Sunshine Law and there is no requirement that these meetings be open and noticed to the public.

Officials may also meet alone with their staff or employees for "fact-finding" purposes in order to execute their duties without violating the Sunshine Law.<sup>30</sup> In addition, case law states that as long as they do not have decision making authority, "fact-finding" committees are not subject to the Sunshine Law.<sup>31</sup> The Florida Supreme Court ruled that "[w]hen a committee has been established for and conducts only information gathering and reporting, the activities of that committee are not subject to § 286.011, Fla. Stat."<sup>32</sup>

#### What Happens if a Meeting Violates the Sunshine Law?

Section 286.011(1), F.S., provides that the penalty for violating the Sunshine Law is to undo any business conducted in a meeting that should have been public. Specifically, it states, "no resolution, rule, or formal action shall be considered binding except as taken or made at such meeting."

<sup>24</sup> Id.

<sup>&</sup>lt;sup>25</sup> Blackford v. Sch. Bd., 375 So. 2d 578, 580 (Fla. 5th DCA 1979).

<sup>&</sup>lt;sup>26</sup> *Id*.

<sup>&</sup>lt;sup>27</sup> Miami Beach v. Berns, 245 So. 2d 38, 41 (Fla. 1971).

 $<sup>^{28}</sup>$  Id.

<sup>&</sup>lt;sup>29</sup> City of Sunrise v. News and Sun-Sentinel Co., 542 So. 2d 1354, 1355 (Fla. 4th DCA 1989).

<sup>&</sup>lt;sup>30</sup> Sarasota Citizens for Responsible Gov't v. City of Sarasota, 48 So. 3d 755 (Fla. 2010). See also Bennett v. Warden, 333 So. 2d 97 (Fla. Dist. Ct. App. 1976).

<sup>&</sup>lt;sup>31</sup> Sarasota Citizens for Responsible Gov't v. City of Sarasota, 48 So. 3d 755 (Fla. 2010).

<sup>&</sup>lt;sup>32</sup> *Id.* at 757.

Courts have meted out a wide range of punishments to bodies who have violated the Sunshine Law, the most severe of which is to make a final action void. A violation of the Sunshine Law is "an irreparable public injury" and it does not matter if an entity did not intend to engage in such an act.<sup>33</sup> Additionally, courts may also order entities to stop meeting unless they meet in the open.<sup>34</sup>

However, it is worth noting that some courts have been more lenient and permitted entities to "cure" the violations. For example, a court may permit a body to cure Sunshine Law violations by requiring that information be made public and that all the subject matter be "reexamined and rediscussed" in an open meeting.<sup>35</sup>

#### III. Effect of Proposed Changes:

The bill creates s. 286.011(1)(a), F.S., codifying judicial interpretation and application of the terms: "de facto meeting," "discussion," "meeting," "official act," and "public business." Those terms are defined as follows:

- "De facto meeting" means the use of board or commission staff or third parties, acting as intermediaries, to facilitate discussion of public business between board or commission members.
- "Discussion" means a conversation between or among board or commission members regardless of whether through oral, written, electronic, or any other form of communication.
- "Meeting" means a gathering, whether formal or informal, of two or more members of the same board or commission, even if they have not yet taken office.
- "Official act" means the adoption of a resolution or rule or other formal action being taken by the board or commission.
- "Public business" means any matter before, or foreseeably expected to come before, the board or commission.

The bill also specifies that members of a board may participate in "fact-finding" exercises or excursion to research public business, and may participate in meetings with a member of the Legislature if:

- The board provides reasonable notice;
- A vote, official act, or an agreement regarding a future action does not occur;
- There is no discussion of "public business" that occurs; and
- There are appropriate records, minutes, audio recordings, or video recordings made and retained as a public record.

Finally, the bill provides that, if there is a gathering of two or more board members where no official acts are taken and no public business is discussed, then no public notice or access is required.

This bill is effective upon becoming law.

<sup>&</sup>lt;sup>33</sup> Palm Beach v. Gradison, 296 So. 2d 473 (Fla. 1974).

<sup>&</sup>lt;sup>34</sup> Wood v. Marston, 442 So. 2d 934 (Fla. 1983).

<sup>&</sup>lt;sup>35</sup> Blackford v. Sch. Bd., 375 So. 2d 578, 581 (Fla. 5th DCA 1979).

#### IV. Constitutional Issues:

A. Municipality/County Mandates Restrictions:

None.

B. Public Records/Open Meetings Issues:

Art. I, s.24(c) of the Florida Constitution provides the manner in which exemptions to Florida's Sunshine Laws may be created and requires a two-thirds vote of each house in order for such exemptions to be enacted. Because this bill does not create any new exemptions or codify existing jurisprudentially-created exemptions, neither the substantive requirements nor the two-thirds vote in each house requirement apply to this bill.

C. Trust Funds Restrictions:

None.

#### V. Fiscal Impact Statement:

A. Tax/Fee Issues:

None.

B. Private Sector Impact:

None.

C. Government Sector Impact:

This bill merely codifies jurisprudence, so it is not anticipated that this bill will have a fiscal impact.

#### VI. Technical Deficiencies:

None.

#### VII. Related Issues:

None.

#### VIII. Statutes Affected:

This bill substantially amends s. 286.011, Florida Statutes.

#### IX. **Additional Information:**

Committee Substitute – Statement of Changes: (Summarizing differences between the Committee Substitute and the prior version of the bill.) A.

None.

B. Amendments:

None.

This Senate Bill Analysis does not reflect the intent or official position of the bill's introducer or the Florida Senate.

## **APPEARANCE RECORD**

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(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

SB 192

Meeting Date	Bill Number (if applicable)
Topic 5B192: Public Meetings	
Name Brian Sullivan	
Job Title Chief Legal Counsel	
Address 100 S. Monvoe	Phone 810-335-0150
Tullahassee FL	_ Email
City State Zip	
(The Cha	Speaking: In Support Against air will read this information into the record.)
Representing Flunda Association of Countres	
Appearing at request of Chair: Yes No Lobbyist regis	tered with Legislature: Yes No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

This form is part of the public record for this meeting.

S-001 (10/14/14)

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### **APPEARANCE RECORD**

(Deliver BOTH copies of this form to the Senator or Senate P	rofessional Staff conducting the meeting)  Bill Number (if applicable)
Meeting Date	Bill Nulliber (il applicable)
Topic Public Meetings	Amendment Barcode (if applicable)
Name David Cruz	
Job Title Legislative Counsel	
Address P.O. Box 1757	Phone 7017474
tallahassee F-6	Email DCRUCOCCITICS.com
City State Zi	
Speaking: For Against Information	Waive Speaking: In Support Against (The Chair will read this information into the record.)
Representing Florida League of	Cities
Appearing at request of Chair: Yes No Lobbyi	st registered with Legislature: Yes No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

This form is part of the public record for this meeting.

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S-001 (10/14/14)



Governmental Oversight and Accountability, Chair Criminal Justice, Vice Chair
Appropriations Subcommittee on Criminal and Civil Justice Appropriations Subcommittee on Health and Human Services

Transportation

SELECT COMMITTEE:
Joint Select Committee on Collective Bargaining

JOINT COMMITTEE: Joint Legislative Auditing Committee

October 10, 2017

The Honorable Senator Tom Lee 418 Senate Office Building 404 So Monroe Street Tallahassee, Florida 32399

Dear Chairman Lee,

I respectfully request you place Senate Bill 192 Public Meetings on your next available agenda.

This bill allows two or more county commissioners to discuss issues pertaining to business as in fact-finding exercises or excursions to research public business, so long as no official acts are taken and any public business is not discussed, that would require public notice of, and access to, any gathering of two or more members of the same board or commission.

I appreciate your favorable consideration.

Onward & Upward,

Dennis Baxley Senator, District 12

DKB/dd

cc: Tom Yeatman, Staff Director

320 Senate Office Building, 404 South Monroe St, Tallahassee, Florida 32399-1100 • (850) 487-5012 Email: baxley.dennis@flsenate.gov

By Senator Baxley

12-00191-18 2018192\_ A bill to be entitled

An act relating to public meetings; amending s. 286.011, F.S.; defining terms; specifying conditions under which members of any board or commission of any state agency or authority or of any agency or authority of any county, municipal corporation, or political subdivision may participate in fact-finding exercises or excursions; providing for construction;

providing an effective date.

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Be It Enacted by the Legislature of the State of Florida:

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Section 1. Subsection (1) of section 286.011, Florida Statutes, is amended, present subsections (2) through (8) of that section are renumbered as subsections (3) through (9), respectively, and a new subsection (2) is added to that section, to read:

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286.011 Public meetings and records; public inspection; criminal and civil penalties.—

(1) (a) As used in this section, the term:

1. "De facto meeting" means the use of board or commission staff or third parties, acting as intermediaries, to facilitate discussion of public business between board or commission members.

2. "Discussion" means a conversation between or among board or commission members regardless of whether through oral, written, electronic, or any other form of communication.

3. "Meeting" means a gathering, whether formal or informal, of two or more members of the same board or commission, even if

Page 1 of 3

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Florida Senate - 2018 SB 192

2018192

12-00191-18

30	they have not yet taken office.
31	4. "Official act" means the adoption of a resolution or
32	rule or other formal action being taken by the board or
33	commission.
34	5. "Public business" means any matter before, or
35	foreseeably expected to come before, the board or commission.
36	(b) Except as otherwise provided in the State Constitution,
37	all meetings or de facto meetings of any board or commission of
38	any state agency or authority or of any agency or authority of
39	any county, municipal corporation, or political subdivision $\underline{\mathtt{at}}$
40	which official acts are to be taken or public business is to be
41	transacted or discussed are declared to be public meetings open
42	to the public., except as otherwise provided in the
43	Constitution, including meetings with or attended by any person
44	elected to such board or commission, but who has not yet taken
45	office, at which official acts are to be taken are declared to
46	be public meetings open to the public at all times, and
47	(c) Members of the same board or commission may participate
48	in fact-finding exercises or excursions to research public
49	business, and may participate in meetings with a member of the
50	Legislature, if:
51	1. The board or commission provides reasonable notice;
52	2. A vote, an official act, or an agreement regarding an
53	action at a future meeting does not occur;
54	3. A discussion of public business, as those terms are
55	defined in paragraph (a), does not occur; and
56	4. Appropriate records, minutes, audio recordings, or video
57	recordings are made and retained as a public record.
58	$\underline{\text{(d)}}$ A no resolution, rule, or formal action $\underline{\text{is not}}$ shall be

Page 2 of 3

 ${\tt CODING:}$  Words  ${\tt stricken}$  are deletions; words  ${\tt \underline{underlined}}$  are additions.

2018192

considered binding <u>unless</u> except as taken or made at <u>a public</u> such meeting. The board or commission must provide reasonable notice of all such meetings.

(2) So long as no official acts are taken and any public business is not discussed, subsection (1) may not be construed to require public notice of and access to any gathering of two or more members of the same board or commission.

Section 2. This act shall take effect upon becoming a law.

12-00191-18

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Page 3 of 3

## The Florida Senate BILL ANALYSIS AND FISCAL IMPACT STATEMENT

(This document is based on the provisions contained in the legislation as of the latest date listed below.)

	Prepared By: 1	he Professional Staff	f of the Committee	on Community	Affairs
BILL:	CS/SB 272				
INTRODUCER:	Community Affairs Committee and Senator Brandes				
SUBJECT:	Local Tax Referenda				
DATE:	October 24, 201	7 REVISED:			
ANAL	YST S	TAFF DIRECTOR	REFERENCE		ACTION
1. Present	Ye	eatman	CA	Fav/CS	
2.			AFT		
3.			AP		
4.			RC		

#### Please see Section IX. for Additional Information:

**COMMITTEE SUBSTITUTE - Substantial Changes** 

#### I. Summary:

CS/SB 272 provides that a referendum to adopt or amend a local option discretionary sales surtax which is held at any date other than a general election requires the approval of at least 60 percent of the electors voting. If the referendum is held at a general election, only a simple majority is required.

#### II. Present Situation:

#### **Discretionary Sales Surtax**

The Florida Constitution preempts all forms of taxation to the state, except for ad valorem taxes on real estate and tangible personal property, unless otherwise provided by general law.<sup>1</sup> Counties have limited authority to levy discretionary sales surtaxes on transactions subject to state sales tax.<sup>2,3</sup> The Legislature has prescribed authorized uses for the local option discretionary sales surtax revenues, which include:

- Operating a transportation system in a charter county;<sup>4</sup>
- Financing local government infrastructure projects;<sup>5</sup>

<sup>&</sup>lt;sup>1</sup> Art. VII, s. 1(a), Fla. Const.

<sup>&</sup>lt;sup>2</sup> Sections 212.054 and 212.055, F.S.

<sup>&</sup>lt;sup>3</sup> Surtaxes only apply to the first \$5,000 of a taxable transaction pursuant to s. 212.054(2)(b)1, F.S.

<sup>&</sup>lt;sup>4</sup> Section 212.055(1), F.S.

<sup>&</sup>lt;sup>5</sup> Section 212.055(2), F.S.

 Providing additional revenue for counties having less than 50,000 residents as of April 1, 1992:<sup>6</sup>

- Providing medical care for indigent persons;<sup>7</sup>
- Funding trauma centers;<sup>8</sup>
- Operating, maintaining, and administering a county public general hospital;<sup>9</sup>
- Constructing and renovating schools;<sup>10</sup>
- Providing emergency fire rescue services and facilities;<sup>11</sup> and
- Funding pension liability shortfalls. 12

The surtax is collected by the Department of Revenue (DOR) using the same procedures utilized for the administration, collection, and enforcement of the general state sales tax. DOR places these funds into the Discretionary Sales Surtax Clearing Trust Fund. A separate account is established for each county imposing a discretionary surtax. The proceeds of the surtax are distributed to the county on a monthly basis, minus an administrative fee of the lesser of 3 percent or administrative costs solely and directly attributable to the surtax. Each county is liable for administrative costs equal to its prorated share of discretionary sales surtax revenue to the amount collected statewide. <sup>14</sup>

New surtaxes and rate changes to existing surtaxes take effect on January 1, while the repeal of an existing surtax takes effect on December 31.<sup>15</sup> The governing body of the county or the school district must notify DOR of the imposition, termination, or rate change of a discretionary sales surtax within 10 days of final adoption by ordinance or referendum, but no later than November 16. The notification must include the duration of the surtax, the surtax rate, a copy of the ordinance, and any additional information DOR requires by rule.<sup>16</sup> If the county or school district fails to provide timely notice, the effective date of the change is delayed by 1 year.<sup>17</sup> Counties and school districts are also required to notify DOR if a referendum or consideration of an ordinance to impose, terminate, or change the rate of a surtax is to occur after October 1.<sup>18</sup>

The 49 counties and 16 school districts levying one or more discretionary sales surtaxes are projected to realize \$2.35 billion in revenue in fiscal year 2016-17. If all counties and school

<sup>&</sup>lt;sup>6</sup> Section 212.055(3), F.S.

<sup>&</sup>lt;sup>7</sup> Section 212.055(4)(a), F.S. (for counties with more than 800,000 residents); s. 212.055(7), F.S. (for counties with less than 800,000 residents).

<sup>&</sup>lt;sup>8</sup> Section 212.055(4)(b), F.S.

<sup>&</sup>lt;sup>9</sup> Section 212.055(5), F.S.

<sup>&</sup>lt;sup>10</sup> Section 212.055(6), F.S.

<sup>&</sup>lt;sup>11</sup> Section 212.055(8), F.S.

<sup>&</sup>lt;sup>12</sup> Section 212.055(9), F.S.

<sup>&</sup>lt;sup>13</sup> Section 212.054(4)(a), F.S.

<sup>&</sup>lt;sup>14</sup> Section 212.054(4)(b), F.S.

<sup>&</sup>lt;sup>15</sup> Section 212.054(5), F.S.

<sup>&</sup>lt;sup>16</sup> Section 212.054(7)(a), F.S.

<sup>&</sup>lt;sup>17</sup> Id.

<sup>&</sup>lt;sup>18</sup> Section 212.054(7)(b), F.S. The deadline for this notification is October 1.

<sup>&</sup>lt;sup>19</sup> 2017 Florida Tax Handbook, Office of Economic and Demographic Research, p. 220, available at <a href="http://edr.state.fl.us/Content/revenues/reports/tax-handbook/taxhandbook2017.pdf">http://edr.state.fl.us/Content/revenues/reports/tax-handbook/taxhandbook2017.pdf</a> (last visited Oct. 16, 2017).

districts levied discretionary sales surtaxes at the maximum possible rate, they would be projected to raise \$11.68 billion in revenue in fiscal year 2016-17.<sup>20</sup>

Most local discretionary sales surtaxes may only be approved by referendum, while some may be approved by an extraordinary vote of the county commission.<sup>21</sup> For those requiring voter approval, the referendum must be approved by a majority of electors voting.<sup>22</sup> Except for the emergency fire rescue services and facilities surtax, the date of the referendum is at the discretion of the county commission.<sup>23</sup>

#### **Referendum Process**

The Florida Election Code states the general requirements for a referendum.<sup>24</sup> The question presented to voters must contain a ballot summary with clear and unambiguous language, such that a "yes" or "no" vote on the measure indicates approval or rejection, respectively.<sup>25</sup> The ballot summary should explain the chief purpose of the measure and may not exceed 75 words.<sup>26</sup> The ballot summary and title must be included in the resolution or ordinance calling for the referendum.<sup>27</sup> For some discretionary sales surtaxes, the form of the ballot question is specified by statute.<sup>28</sup>

Five types of elections exist under the Election Code: primary elections, special primary elections, special elections, general elections, and presidential preference primary elections.<sup>29</sup> A "general election" is held on the first Tuesday after the first Monday in November in even-numbered years to fill national, state, county, and district offices, and for voting on constitutional amendments.<sup>30</sup>

#### III. Effect of Proposed Changes:

**Section 1** amends s. 212.055, F.S., to provide that a referendum to adopt or amend a local government discretionary sales surtax, which is held at any date other than a general election requires the approval of at least 60 percent of the electors voting on the ballot question. As in current law, a referendum to adopt or amend a local government discretionary sales surtax that is

<sup>&</sup>lt;sup>20</sup> 2016 Local Government Financial Information Handbook, Office of Economic and Demographic Research, p. 150, available at http://edr.state.fl.us/Content/local-government/reports/lgfih16.pdf (last visited Oct. 16, 2017).

<sup>&</sup>lt;sup>21</sup> See generally s. 212.055, F.S., but see s. 212.055(3), F.S. (small county surtax may be approved by extraordinary vote of the county commission, as long as surtax revenues are not used for servicing bond indebtedness), s. 212.055(4), F.S. (indigent care and trauma center surtax may be approved by extraordinary vote of the county commission), and s. 212.055(5), F.S. (county public hospital surtax may be approved by extraordinary vote of the county commission).

<sup>&</sup>lt;sup>22</sup> Section 212.055, F.S.

<sup>&</sup>lt;sup>23</sup> E.g. s. 212.055(1)(c), F.S. (referendum for charter county and regional transportation system to be held at a time "set at the discretion of the governing body"); but see s. 212.055(8)(b), F.S. (referendum for emergency fire rescue services and facilities surtax must be placed on the ballot of a "regularly scheduled election").

<sup>&</sup>lt;sup>24</sup> Section 101.161, F.S.

<sup>&</sup>lt;sup>25</sup> Section 101.161(1), F.S.

<sup>&</sup>lt;sup>26</sup> *Id*.

<sup>&</sup>lt;sup>27</sup> Id.

<sup>&</sup>lt;sup>28</sup> See s. 212.055(4)(b)1., F.S. (ballot question for discretionary sales surtax for trauma centers).

<sup>&</sup>lt;sup>29</sup> Section 97.021(11), F.S.

<sup>&</sup>lt;sup>30</sup> Art. VI, s. 5(a), Fla. Const. (also codified as s. 97.021(16), F.S.).

held at a general election requires the approval of a majority of the electors voting on the ballot question.

For purposes of the bill, the definition recited in the present situation section of this analysis for the term "general election" applies.

**Section 2** provides that the act takes effect July 1, 2018.

#### IV. Constitutional Issues:

#### A. Municipality/County Mandates Restrictions:

Subsection 18(b) of article VII of the Florida Constitution provides that the Legislature, except upon approval by a two-thirds vote, may not enact a general law if the anticipated effect of doing so would be to reduce the *authority* that counties or municipalities have to raise revenues in the aggregate.

In 1991, Senate President Margolis and House Speaker Wetherell created a memo to guide the House and Senate in the review of local government mandates. In the memo, the guidelines define the term "authority" to mean the power to levy a tax; the vote required to levy the tax, e.g., increasing the required vote from majority to majority plus one; the tax rate which can be levied; and the base against which the tax is levied, e.g., a bill providing a sales tax exemption should be considered a reduction in authority because counties have authority to levy local option sales taxes against the state sales tax base.

The bill requires a vote of at least 60 percent of the electors voting in a referendum to adopt or amend a local discretionary sales surtax at a date other than a general election. The bill appears to reduce the "authority" that counties or municipalities have to raise revenues in the aggregate. The bill does not appear to qualify under any exemption or exception. If the bill qualifies as a mandate, final passage must be approved by two-thirds of the membership of each house of the Legislature.

ł	В	Public	Record	ds/C	pen N	vleet	ings	Issues

None.

#### C. Trust Funds Restrictions:

None.

#### V. Fiscal Impact Statement:

#### A. Tax/Fee Issues:

None.

B. Priva	ate Sector	Impact:
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None.

#### C. Government Sector Impact:

None.

#### VI. Technical Deficiencies:

None.

#### VII. Related Issues:

None.

#### VIII. Statutes Affected:

This bill substantially amends section 212.055 of the Florida Statutes.

#### IX. Additional Information:

#### A. Committee Substitute – Statement of Substantial Changes:

(Summarizing differences between the Committee Substitute and the prior version of the bill.)

#### CS by Community Affairs Committee on October 24, 2017:

Removes a provision that required a municipality to attain a vote of at least 60 percent of the governing body of the municipality in order to increase the millage rate of ad valorem taxes levied on real and tangible personal property within the municipality.

#### B. Amendments:

None.

This Senate Bill Analysis does not reflect the intent or official position of the bill's introducer or the Florida Senate.



	LEGISLATIVE ACTION	
Senate	•	House
Comm: WD	•	
10/24/2017	•	
	•	
	•	
	•	

The Committee on Community Affairs (Brandes) recommended the following:

#### Senate Amendment

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In title, delete line 2 and insert:

> An act relating to local government taxation; amending s.



	LEGISLATIVE ACTIO	N
Senate		House
Comm: RCS	•	
10/24/2017		
The Committee on Comm	unity Affairs (Brand	des) recommended the
following:	aniey milairo (branc	ies, recommended ene
TOTIOWING.		
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  ======	T L E A M E N D M	F. N T =========
And the title is amend		
Delete lines 3 -	<i>1</i> •	

# **APPEARANCE RECORD**

Meeting Date  (Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)
Topic Local Surtax Referenda Milage Rates  Bill Number (if applicable)  Surtax Referenda Milage Rates  Amendment Barcode (if applicable)
Name Amendment Barcode (if applicable)
Job Title Sv. Logistative Advocate
Address PD B0x 1757 Phone 850 70 - 3621
Tallahassee FL 32302 Email a hughes afleties. Lon
Speaking: For Against Information Waive Speaking: In Support Against (The Chair will read this information into the record.)
Representing Florida League of (the)
Appearing at request of Chair: Yes No Lobbyist registered with Legislature: Yes No
While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this  This form is part of the public record for this.
This form is part of the public record for this meeting.

## **APPEARANCE RECORD**



(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

10124/2017	opies of this form to the Sena	tor or Senate Professional	Staff conducting the meeting)
Meeting Date			272
· ·			Bill Number (if applicable)
Topic			
. орю			Amendment Barcode (if applicable)
Name BriAN Pitts			(
Job Title Trustee			·
Address 1119 Newton 1	tue S		Phone <u>%7/897-929/</u>
· · · · · · · · · · · · · · · · · · ·	,		,
St. Petersburg	F_L State	33705	Email justice 2 jesos @ vahoo com
C		Zip	3 3 7
Speaking: For Against	Information	Waive S (The Cha	peaking: In Support Against ir will read this information into the record.)
Representing	Justice-2-		
Appearing at request of Chair: [	Yes No	Lobbyist regist	ered with Legislature: Yes L No
While it is a Senate tradition to encourameeting. Those who do speak may be	age public testimony, tim asked to limit their rema	ne may not permit all orks so that as many	persons wishing to speak to be heard at this persons as possible can be heard
This form is part of the public record	d for this meeting	•	, see san bo nourd.
-	and moderny.		S-001 (10/14/14)

#### The Florida Senate



## **Committee Agenda Request**

10:	Committee on Community Affairs
Subject:	Committee Agenda Request
Date:	October 3, 2017
I respectfu	ally request that Senate Bill #272, relating to Local Tax Referenda, be placed on the:
$\boxtimes$	committee agenda at your earliest possible convenience.
	next committee agenda.

Senator Jeff Brandes Florida Senate, District 24

By Senator Brandes

2.8

24-00344A-18 2018272

A bill to be entitled
An act relating to local tax referenda; amending s.
166.211, F.S.; providing that a municipality may
increase the millage rate of ad valorem taxes levied
on real and tangible personal property only by a vote
of a specified percentage of the municipality's
governing body approving the increase; amending s.
212.055, F.S.; revising the voter approval threshold
required to pass a referendum to adopt or amend local
government discretionary sales surtaxes when the
referendum is held at any date other than a general
election; conforming provisions to changes made by the
act; providing an effective date.

Be It Enacted by the Legislature of the State of Florida:

Section 1. Present subsection (2) of section 166.211, Florida Statutes, is redesignated as subsection (3), and a new subsection (2) is added to that section, to read:

166.211 Ad valorem taxes.-

(2) A municipality may increase the millage rate of ad valorem taxes levied on real and tangible personal property within the municipality only by a vote of at least 60 percent of the governing body of the municipality which approves the increase.

Section 2. Paragraphs (a) and (c) of subsection (1), paragraph (a) of subsection (2), paragraph (a) of subsection (3), subsections (4) and (5), paragraph (a) of subsection (6), paragraph (a) of subsection (7), paragraph (b) of subsection

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Florida Senate - 2018 SB 272

24-00344A-18 2018272

(8), and paragraph (a) of subsection (9) of section 212.055, Florida Statutes, are amended, and subsection (10) is added to that section, to read:

212.055 Discretionary sales surtaxes; legislative intent; authorization and use of proceeds.—It is the legislative intent that any authorization for imposition of a discretionary sales surtax shall be published in the Florida Statutes as a subsection of this section, irrespective of the duration of the levy. Each enactment shall specify the types of counties authorized to levy; the rate or rates which may be imposed; the maximum length of time the surtax may be imposed, if any; the procedure which must be followed to secure voter approval, if required; the purpose for which the proceeds may be expended; and such other requirements as the Legislature may provide. Taxable transactions and administrative procedures shall be as provided in s. 212.054.

- (1) CHARTER COUNTY AND REGIONAL TRANSPORTATION SYSTEM SURTAX.—
- (a) Each charter county that has adopted a charter, each county the government of which is consolidated with that of one or more municipalities, and each county that is within or under an interlocal agreement with a regional transportation or transit authority created under chapter 343 or chapter 349 may levy a discretionary sales surtax, subject to approval by a majority vote of the electorate of the county or by a charter amendment approved by a majority vote of the electorate of the county.
- (c) The proposal to adopt a discretionary sales surtax as provided in this subsection and to create a trust fund within

Page 2 of 17

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24-00344A-18 2018272

the county accounts shall be placed on the ballot in accordance with law and must be approved in a referendum as set forth in subsection (10) at a time to be set at the discretion of the governing body.

(2) LOCAL GOVERNMENT INFRASTRUCTURE SURTAX.-

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- (a)1. The governing authority in each county may levy a discretionary sales surtax of 0.5 percent or 1 percent. The levy of the surtax shall be pursuant to an ordinance enacted by a majority of the members of the county governing authority and approved by a majority of the electors of the county, as set forth in subsection (10), voting in a referendum on the surtax. If the governing bodies of the municipalities representing a majority of the county's population adopt uniform resolutions establishing the rate of the surtax and calling for a referendum on the surtax, the levy of the surtax shall be placed on the ballot and shall take effect if approved by a majority of the electors of the county, as set forth in subsection (10), voting in the referendum on the surtax.
- 2. If the surtax was levied pursuant to a referendum held before July 1, 1993, the surtax may not be levied beyond the time established in the ordinance, or, if the ordinance did not limit the period of the levy, the surtax may not be levied for more than 15 years. The levy of such surtax may be extended only by approval of a majority of the electors of the county, as set forth in subsection (10), voting in a referendum on the surtax.
  - (3) SMALL COUNTY SURTAX.-
- (a) The governing authority in each county that has a population of 50,000 or less on April 1, 1992, may levy a discretionary sales surtax of 0.5 percent or 1 percent. The levy

Page 3 of 17

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Florida Senate - 2018 SB 272

24-00344A-18 2018272 of the surtax shall be pursuant to an ordinance enacted by an extraordinary vote of the members of the county governing authority if the surtax revenues are expended for operating purposes. If the surtax revenues are expended for the purpose of servicing bond indebtedness, the surtax shall be approved by  $\frac{1}{2}$ 93 majority of the electors of the county, as set forth in subsection (10), voting in a referendum on the surtax. 95 (4) INDIGENT CARE AND TRAUMA CENTER SURTAX.-96 (a)1. The governing body in each county the government of 97 which is not consolidated with that of one or more municipalities, which has a population of at least 800,000 residents and is not authorized to levy a surtax under 100 subsection (5), may levy, pursuant to an ordinance either 101 approved by an extraordinary vote of the governing body or conditioned to take effect only upon approval by a majority vote of the electors of the county, as set forth in subsection (10), 103 voting in a referendum, a discretionary sales surtax at a rate 104 that may not exceed 0.5 percent. 105 106 2. If the ordinance is conditioned on a referendum, a 107 statement that includes a brief and general description of the 108 purposes to be funded by the surtax and that conforms to the requirements of s. 101.161 shall be placed on the ballot by the 110 governing body of the county. The following questions shall be 111 placed on the ballot: 112 113 FOR THE. . . . CENTS TAX

3. The ordinance adopted by the governing body providing  ${\tt Page \ 4 \ of \ 17}$ 

AGAINST THE. . . . CENTS TAX

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2018272

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117 for the imposition of the surtax shall set forth a plan for 118 providing health care services to qualified residents, as 119 defined in subparagraph 4. Such plan and subsequent amendments 120 to it shall fund a broad range of health care services for both 121 indigent persons and the medically poor, including, but not 122 limited to, primary care and preventive care as well as hospital 123 care. The plan must also address the services to be provided by 124 the Level I trauma center. It shall emphasize a continuity of 125 care in the most cost-effective setting, taking into 126 consideration both a high quality of care and geographic access. 127 Where consistent with these objectives, it shall include, 128 without limitation, services rendered by physicians, clinics, 129 community hospitals, mental health centers, and alternative 130 delivery sites, as well as at least one regional referral 131 hospital where appropriate. It shall provide that agreements 132 negotiated between the county and providers, including hospitals 133 with a Level I trauma center, will include reimbursement 134 methodologies that take into account the cost of services 135 rendered to eligible patients, recognize hospitals that render a 136 disproportionate share of indigent care, provide other 137 incentives to promote the delivery of charity care, promote the 138 advancement of technology in medical services, recognize the 139 level of responsiveness to medical needs in trauma cases, and

Page 5 of 17

require cost containment, including, but not limited to, case

management. It must also provide that any hospitals that are

public access equal to that provided under s. 286.011 as to

meetings of the governing board, the subject of which is

owned and operated by government entities on May 21, 1991, must,

as a condition of receiving funds under this subsection, afford

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2018272 146 budgeting resources for the rendition of charity care as that 147 term is defined in the Florida Hospital Uniform Reporting System 148 (FHURS) manual referenced in s. 408.07. The plan shall also include innovative health care programs that provide cost-150 effective alternatives to traditional methods of service 151 delivery and funding.

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- 4. For the purpose of this paragraph, the term "qualified resident" means residents of the authorizing county who are:
- a. Qualified as indigent persons as certified by the authorizing county;
- b. Certified by the authorizing county as meeting the definition of the medically poor, defined as persons having insufficient income, resources, and assets to provide the needed medical care without using resources required to meet basic needs for shelter, food, clothing, and personal expenses; or not being eligible for any other state or federal program, or having medical needs that are not covered by any such program; or having insufficient third-party insurance coverage. In all cases, the authorizing county is intended to serve as the payor of last resort; or
- c. Participating in innovative, cost-effective programs approved by the authorizing county.
- 5. Moneys collected pursuant to this paragraph remain the property of the state and shall be distributed by the Department of Revenue on a regular and periodic basis to the clerk of the circuit court as ex officio custodian of the funds of the authorizing county. The clerk of the circuit court shall:
- a. Maintain the moneys in an indigent health care trust fund;

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b. Invest any funds held on deposit in the trust fund pursuant to general law;

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- c. Disburse the funds, including any interest earned, to any provider of health care services, as provided in subparagraphs 3. and 4., upon directive from the authorizing county. However, if a county has a population of at least 800,000 residents and has levied the surtax authorized in this paragraph, notwithstanding any directive from the authorizing county, on October 1 of each calendar year, the clerk of the court shall issue a check in the amount of \$6.5 million to a hospital in its jurisdiction that has a Level I trauma center or shall issue a check in the amount of \$3.5 million to a hospital in its jurisdiction that has a Level I trauma center if that county enacts and implements a hospital lien law in accordance with chapter 98-499. Laws of Florida. The issuance of the checks on October 1 of each year is provided in recognition of the Level I trauma center status and shall be in addition to the base contract amount received during fiscal year 1999-2000 and any additional amount negotiated to the base contract. If the hospital receiving funds for its Level I trauma center status requests such funds to be used to generate federal matching funds under Medicaid, the clerk of the court shall instead issue a check to the Agency for Health Care Administration to accomplish that purpose to the extent that it is allowed through the General Appropriations Act; and
- d. Prepare on a biennial basis an audit of the trust fund specified in sub-subparagraph a. Commencing February 1, 2004, such audit shall be delivered to the governing body and to the chair of the legislative delegation of each authorizing county.

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6. Notwithstanding any other provision of this section, a county shall not levy local option sales surtaxes authorized in this paragraph and subsections (2) and (3) in excess of a combined rate of 1 percent.

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- (b) Notwithstanding any other provision of this section, the governing body in each county the government of which is not consolidated with that of one or more municipalities and which has a population of less than 800,000 residents, may levy, by ordinance subject to approval by a majority of the electors of the county, as set forth in subsection (10), voting in a referendum, a discretionary sales surtax at a rate that may not exceed 0.25 percent for the sole purpose of funding trauma services provided by a trauma center licensed pursuant to chapter 395.
- 1. A statement that includes a brief and general description of the purposes to be funded by the surtax and that conforms to the requirements of s. 101.161 shall be placed on the ballot by the governing body of the county. The following shall be placed on the ballot:

FOR THE. . . . CENTS TAX

AGAINST THE. . . . CENTS TAX

- 2. The ordinance adopted by the governing body of the county providing for the imposition of the surtax shall set forth a plan for providing trauma services to trauma victims presenting in the trauma service area in which such county is located.
  - 3. Moneys collected pursuant to this paragraph remain the

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property of the state and shall be distributed by the Department of Revenue on a regular and periodic basis to the clerk of the circuit court as ex officio custodian of the funds of the authorizing county. The clerk of the circuit court shall:

- a. Maintain the moneys in a trauma services trust fund.
- b. Invest any funds held on deposit in the trust fund pursuant to general law.

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- c. Disburse the funds, including any interest earned on such funds, to the trauma center in its trauma service area, as provided in the plan set forth pursuant to subparagraph 2., upon directive from the authorizing county. If the trauma center receiving funds requests such funds be used to generate federal matching funds under Medicaid, the custodian of the funds shall instead issue a check to the Agency for Health Care Administration to accomplish that purpose to the extent that the agency is allowed through the General Appropriations Act.
- d. Prepare on a biennial basis an audit of the trauma services trust fund specified in sub-subparagraph a., to be delivered to the authorizing county.
- 4. A discretionary sales surtax imposed pursuant to this paragraph shall expire 4 years after the effective date of the surtax, unless reenacted by ordinance subject to approval by a majority of the electors of the county, as set forth in subsection (10), voting in a subsequent referendum.
- 5. Notwithstanding any other provision of this section, a county shall not levy local option sales surtaxes authorized in this paragraph and subsections (2) and (3) in excess of a combined rate of 1 percent.
  - (5) COUNTY PUBLIC HOSPITAL SURTAX.—Any county as defined in

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24-00344A-18 2018272 262 s. 125.011(1) may levy the surtax authorized in this subsection 263 pursuant to an ordinance either approved by extraordinary vote 264 of the county commission or conditioned to take effect only upon 265 approval by a majority vote of the electors of the county, as 266 set forth in subsection (10), voting in a referendum. In a county as defined in s. 125.011(1), for the purposes of this 267 2.68 subsection, "county public general hospital" means a general 269 hospital as defined in s. 395.002 which is owned, operated, maintained, or governed by the county or its agency, authority, 270 271 or public health trust. 272 (a) The rate shall be 0.5 percent. 273

- (b) If the ordinance is conditioned on a referendum, the proposal to adopt the county public hospital surtax shall be placed on the ballot in accordance with <u>subsection (10)</u> law at a time to be set at the discretion of the governing body. The referendum question on the ballot shall include a brief general description of the health care services to be funded by the surtax.
  - (c) Proceeds from the surtax shall be:

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- 1. Deposited by the county in a special fund, set aside from other county funds, to be used only for the operation, maintenance, and administration of the county public general hospital; and
- 2. Remitted promptly by the county to the agency, authority, or public health trust created by law which administers or operates the county public general hospital.
- (d) Except as provided in subparagraphs 1. and 2., the county must continue to contribute each year an amount equal to at least 80 percent of that percentage of the total county

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budget appropriated for the operation, administration, and maintenance of the county public general hospital from the county's general revenues in the fiscal year of the county ending September 30, 1991:

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- 1. Twenty-five percent of such amount must be remitted to a governing board, agency, or authority that is wholly independent from the public health trust, agency, or authority responsible for the county public general hospital, to be used solely for the purpose of funding the plan for indigent health care services provided for in paragraph (e);
- 2. However, in the first year of the plan, a total of \$10 million shall be remitted to such governing board, agency, or authority, to be used solely for the purpose of funding the plan for indigent health care services provided for in paragraph (e), and in the second year of the plan, a total of \$15 million shall be so remitted and used.
- (e) A governing board, agency, or authority shall be chartered by the county commission upon this act becoming law. The governing board, agency, or authority shall adopt and implement a health care plan for indigent health care services. The governing board, agency, or authority shall consist of no more than seven and no fewer than five members appointed by the county commission. The members of the governing board, agency, or authority shall be at least 18 years of age and residents of the county. No member may be employed by or affiliated with a health care provider or the public health trust, agency, or authority responsible for the county public general hospital. The following community organizations shall each appoint a representative to a nominating committee: the South Florida

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Hospital and Healthcare Association, the Miami-Dade County Public Health Trust, the Dade County Medical Association, the Miami-Dade County Homeless Trust, and the Mayor of Miami-Dade County. This committee shall nominate between 10 and 14 county citizens for the governing board, agency, or authority. The slate shall be presented to the county commission and the county commission shall confirm the top five to seven nominees, depending on the size of the governing board. Until such time as the governing board, agency, or authority is created, the funds provided for in subparagraph (d)2. shall be placed in a restricted account set aside from other county funds and not disbursed by the county for any other purpose.

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- 1. The plan shall divide the county into a minimum of four and maximum of six service areas, with no more than one participant hospital per service area. The county public general hospital shall be designated as the provider for one of the service areas. Services shall be provided through participants' primary acute care facilities.
- 2. The plan and subsequent amendments to it shall fund a defined range of health care services for both indigent persons and the medically poor, including primary care, preventive care, hospital emergency room care, and hospital care necessary to stabilize the patient. For the purposes of this section, "stabilization" means stabilization as defined in s. 397.311(45). Where consistent with these objectives, the plan may include services rendered by physicians, clinics, community hospitals, and alternative delivery sites, as well as at least one regional referral hospital per service area. The plan shall provide that agreements negotiated between the governing board,

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24-00344A-18 2018272 349 agency, or authority and providers shall recognize hospitals 350 that render a disproportionate share of indigent care, provide 351 other incentives to promote the delivery of charity care to draw 352 down federal funds where appropriate, and require cost 353 containment, including, but not limited to, case management. 354 From the funds specified in subparagraphs (d)1. and 2. for 355 indigent health care services, service providers shall receive 356 reimbursement at a Medicaid rate to be determined by the 357 governing board, agency, or authority created pursuant to this 358 paragraph for the initial emergency room visit, and a per-member 359 per-month fee or capitation for those members enrolled in their 360 service area, as compensation for the services rendered 361 following the initial emergency visit. Except for provisions of 362 emergency services, upon determination of eligibility, 363 enrollment shall be deemed to have occurred at the time services 364 were rendered. The provisions for specific reimbursement of 365 emergency services shall be repealed on July 1, 2001, unless 366 otherwise reenacted by the Legislature. The capitation amount or 367 rate shall be determined before program implementation by an 368 independent actuarial consultant. In no event shall such 369 reimbursement rates exceed the Medicaid rate. The plan must also 370 provide that any hospitals owned and operated by government 371 entities on or after the effective date of this act must, as a 372 condition of receiving funds under this subsection, afford 373 public access equal to that provided under s. 286.011 as to any 374 meeting of the governing board, agency, or authority the subject 375 of which is budgeting resources for the retention of charity 376 care, as that term is defined in the rules of the Agency for Health Care Administration. The plan shall also include

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378 innovative health care programs that provide cost-effective 379 alternatives to traditional methods of service and delivery 380 funding.

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- 3. The plan's benefits shall be made available to all county residents currently eligible to receive health care services as indigents or medically poor as defined in paragraph (4) (d).
- 4. Eligible residents who participate in the health care plan shall receive coverage for a period of 12 months or the period extending from the time of enrollment to the end of the current fiscal year, per enrollment period, whichever is less.
- 5. At the end of each fiscal year, the governing board, agency, or authority shall prepare an audit that reviews the budget of the plan, delivery of services, and quality of services, and makes recommendations to increase the plan's efficiency. The audit shall take into account participant hospital satisfaction with the plan and assess the amount of poststabilization patient transfers requested, and accepted or denied, by the county public general hospital.
- (f) Notwithstanding any other provision of this section, a county may not levy local option sales surtaxes authorized in this subsection and subsections (2) and (3) in excess of a combined rate of 1 percent.
  - (6) SCHOOL CAPITAL OUTLAY SURTAX .-
- (a) The school board in each county may levy, pursuant to  $\underline{a}$  resolution conditioned to take effect only upon approval by  $\underline{a}$  majority vote of the electors of the county, as set forth in subsection (10), voting in a referendum, a discretionary sales surtax at a rate that may not exceed 0.5 percent.

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(7) VOTER-APPROVED INDIGENT CARE SURTAX.-

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- (a) 1. The governing body in each county that has a population of fewer than 800,000 residents may levy an indigent care surtax pursuant to an ordinance conditioned to take effect only upon approval by a majority vote of the electors of the county, as set forth in subsection (10), voting in a referendum. The surtax may be levied at a rate not to exceed 0.5 percent, except that if a publicly supported medical school is located in the county, the rate shall not exceed 1 percent.
- 2. Notwithstanding subparagraph 1., the governing body of any county that has a population of fewer than 50,000 residents may levy an indigent care surtax pursuant to an ordinance conditioned to take effect only upon approval by a majority vote of the electors of the county, as set forth in subsection (10), voting in a referendum. The surtax may be levied at a rate not to exceed 1 percent.
  - (8) EMERGENCY FIRE RESCUE SERVICES AND FACILITIES SURTAX .-
- (b) Upon the adoption of the ordinance, the levy of the surtax must be placed on the ballot by the governing authority of the county enacting the ordinance. The ordinance will take effect if approved by a majority of the electors of the county, as set forth in subsection (10), voting in a referendum held for such purpose. The referendum shall be placed on the ballot of a regularly scheduled election. The ballot for the referendum must conform to the requirements of s. 101.161.
  - (9) PENSION LIABILITY SURTAX.-
- (a) The governing body of a county may levy a pension liability surtax to fund an underfunded defined benefit retirement plan or system, pursuant to an ordinance conditioned

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2018272 436 to take effect upon approval by a majority vote of the electors 437 of the county, as set forth in subsection (10), voting in a 438 referendum, at a rate that may not exceed 0.5 percent. The 439 county may not impose a pension liability surtax unless the underfunded defined benefit retirement plan or system is below 440 441 80 percent of actuarial funding at the time the ordinance or referendum is passed. The most recent actuarial report submitted to the Department of Management Services pursuant to s. 112.63 444 must be used to establish the level of actuarial funding for 445 purposes of determining eligibility to impose the surtax. The 446 governing body of a county may only impose the surtax if:

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- 1. An employee, including a police officer or firefighter, who enters employment on or after the date when the local government certifies that the defined benefit retirement plan or system formerly available to such an employee has been closed may not enroll in a defined benefit retirement plan or system that will receive surtax proceeds.
- 2. The local government and the collective bargaining representative for the members of the underfunded defined benefit retirement plan or system or, if there is no representative, a majority of the members of the plan or system, mutually consent to requiring each member to make an employee retirement contribution of at least 10 percent of each member's salary for each pay period beginning with the first pay period after the plan or system is closed.
- 3. The pension board of trustees for the underfunded defined benefit retirement plan or system, if such board exists, is prohibited from participating in the collective bargaining process and engaging in the determination of pension benefits.

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4. The county currently levies a local government infrastructure surtax pursuant to subsection (2) which is scheduled to terminate and is not subject to renewal.

5. The pension liability surtax does not take effect until the local government infrastructure surtax described in subparagraph 4. is terminated.

(10) VOTER APPROVAL THRESHOLDS.—A referendum to adopt or amend a local government discretionary sales surtax under this section which is held at any date other than a general election as defined by s. 97.021 requires the approval of at least 60 percent of the electors voting on the ballot question. A referendum under this section which is held at a general election as defined by s. 97.021 requires the approval of a majority of the electors voting on the ballot question.

Section 3. This act shall take effect July 1, 2018.

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### **CourtSmart Tag Report**

Room: SB 301 Case No.: Type:

Caption: Community Affairs Committee Judge:

Started: 10/24/2017 9:06:00 AM

Ends: 10/24/2017 10:28:15 AM Length: 01:22:16

9:06:01 AM Meeting Called To Order

**9:06:05 AM** Roll Call

**9:06:16 AM** Quorum Present **9:06:32 AM** Tab 2 - SB 192

9:06:35 AM Senator Baxley is recognized to explain SB 192

**9:08:57 AM** Any Questions? **9:09:04 AM** Appearance forms

9:09:07 AM Brian Sullivan waives in support 9:09:13 AM David Cruz waives in support

9:09:20 AM Debate? 9:09:29 AM Waive close 9:09:33 AM Roll Call

9:09:47 AM SB 192 reported favorably

**9:09:51 AM** Tab 1 - continuation of workshop on vacation rentals

9:10:23 AM Patricia Detwiler, Florida Bed and Breakfast Inns Association

**9:17:26 AM** Question?

9:17:53 AM Greg Hansen, County Commissioner of Flagler County

9:20:12 AM Rick Bhula, Hotel Industry

9:22:11 AM Travis Moore, representing Community Associations Institute

9:24:48 AM Sen Brandes Question

9:29:44 AM Discussion between Senators and Travis Moore

9:37:00 AM Heather Beaven 9:40:09 AM Sen Simmons 9:43:25 AM Jennifer Green waives

9:43:38 AM Douglas Beaven 9:46:21 AM Sen Simmons

9:47:34 AM Annette Massey, vacation rental host

9:52:09 AM Sen Simmons

9:55:35 AM Lisa Robertson, AirBnB host

**10:01:08 AM** Mark Robertson, homestead property owner/ Airbnb host

10:08:46 AM Sen Simmons

**10:10:27 AM** Stephanie Herdisty, short term rental owner

10:16:04 AM Christopher Emmanuel, FL Chamber of Commerce

10:16:56 AM Sen Simmons

10:19:20 AM David Brightbill, AirBnB host and traveler

**10:23:20 AM** Tab 3- SB 272

10:23:25 AM Sen Brandes to explain SB 272

10:24:25 AM Amendment 524224

10:24:40 AM FL League of Cities waives in support

10:24:50 AM Amendment adopted

10:25:24 AM Brian Pitts

10:26:12 AM Sen Brandes responds

10:27:11 AM Debate? 10:27:14 AM Sen Clemens 10:27:30 AM Waive close 10:27:32 AM Roll Call

10:27:47 AM SB 272 reported favorably

10:28:07 AM Meeting Adjourned