MEMORANDUM REGARDING LIBERTY PARTNERS AGREEMENT

TO: Mary-Ellen Harper

From: Ray Poole

Date: November 11, 2026

On or about September 23, 2023, the Levy County Board of County Commissioners (hereinafter "Levy County") issued RFP 2024-001, "State Lobbyist Services." A copy of the RFP Cover Page is attached as Exhibit A.

On October 31, 2023, Liberty Partners of Tallahassee, LLC (hereinafter "Liberty Partners"), submitted a proposal to Levy County in response to RFP 2024-001 to provide state lobbyist services for and on behalf of Levy County. Page 38 of Liberty Partners' proposal states as follows:

> Liberty Partners of Tallahassee, LLC, proposes a retainer fee of **$50,000 for 12 months** or **$4,166 per month**, with a 30-day cancellation clause.

See attached Exhibit B.

On November 21, 2023, Levy County awarded the contract under RFP 2024-001 to Liberty Partners, and the parties executed a three (3) year contract under which Liberty Partners was to provide lobbying services for and on behalf of Levy County before the Florida Legislature and its Committees and Members, as well as before Florida's Governor, Cabinet, and State Agencies. A copy of the contract is attached as Exhibit C. For purposes of this memorandum, the significant portions of the contract are as follows:

ARTICLE 1 – INCORPORATION OF DOCUMENTS

> The RFP consisting of 1-30 pages, addenda dated October 24, 2023 (the "Addenda") and the proposal submitted by Consultant dated October 31, 2023 (the "Proposal"), all of which are on file in the County Procurement Department, are made a part of this Agreement. In the event of any conflict, the documents will be given precedence in the following order: (1) this Agreement; (2) the Addenda; (3) the RFP; and (4) the Proposal.

See Exhibit C, Page 1.

The foregoing language makes clear that agreement between Levy County and Liberty Partners incorporated the terms set forth in Liberty Partners' October 31 proposal. Thus, the

ARTICLE 5 – TERM/TERMINATION

5.1 The term of this Agreement shall begin on the Effective Date and continue for a three (3) year period. Upon written notice from the County to the Consultant, **this Agreement may be extended at the end of the initial 3-year term for up to three additional 1 year terms**.

See Exhibit C, Page 4.
The foregoing language makes clear that Levy County has the option to renew the agreement for three (3) additional one (1) year terms. However, Levy County is not required to renew the agreement.

ARTICLE 6 – PAYMENT

6.1 County shall pay to Consultant **the annual rate set forth in the Consultant's Proposal for each fiscal year** and will pay such amount to the Consultant in quarterly installments (on or about October 1, January 1, April 1 and July 1.

See Exhibit C, Page 5.

Based on the foregoing language, it is clear that the agreement between Levy County and Liberty Partners adopted and incorporated therein the fee proposed by Liberty Partners in its October 31 proposal, i.e., the sum of $50,000 per year, which equates to $4,166 per month.

On September 28, 2026, at 1:46 p.m., Lisa Makar sent an email to Liberty Partners in an effort to reconcile what had been paid to Liberty Partners as compared with the payment terms called for in the agreement. The email states as follows:

> I am completing the end of year review for your account and I had a question about the current invoice amounts. The original RFP had the monthly amount of $4,166 and our invoices are for $5,000. What changes were made that increased our monthly cost? I cannot find an revised fee schedule in our records. Do you have a copy you can provide? Thank you for any assistance you can provide.

See Exhibit D.

An hour later, at 2:53 p.m., Jennifer Green at Liberty Partners responded to Lisa Makar and sent the following email:

> Lisa -
>
> Attached is the 2023 proposal document I found in our files. It shows the $5,000 a month fee. Our CPA firm has been invoicing $5,000 a month since

> the beginning of the three-year contract in late 2023 and we have not proposed any revisions.
>
> I hope this helps!

See Exhibit E.

Attached to Ms. Green's email to Lisa Makar was Liberty Partners' October 31 proposal in response to RFP 2024-001. Although that proposal had been submitted to Levy County three years ago, on October 31, 2023, for some reason it had been modified only forty minutes before Ms. Green sent it to Lisa Makar. The version attached to the email contained a price proposal that differed from the one submitted on October 31, 2023. It made no reference to an annualized amount, but instead provided for a $5,000 per month payment. Interestingly, that coincides with Liberty Partners' assertion that it has not been overpaid for the past three (3) years.

Until today, I did not realize that Liberty Partners submitted a price proposal on September 28, 2026, that differed from the one submitted on October 31, 2023. I was also unaware until today that the proposal that Liberty Partners emailed to Lisa Makar on September 28, 2026 had, for some mysterious reason, been revised only minutes earlier – nearly three years after it had originally been prepared and submitted.

In light of the foregoing, as well as the current dispute between Liberty Partners and Levy County regarding overpayments to Liberty Partners during the past three (3) years, I recommend that Levy County not renew the existing contract with Liberty Partners and instead issue a new RFP for lobbying services.