

State of Florida



# Public Service Commission

CAPITAL CIRCLE OFFICE CENTER • 2540 SHUMARD OAK BOULEVARD  
TALLAHASSEE, FLORIDA 32399-0850

**-M-E-M-O-R-A-N-D-U-M-**

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**DATE:** March 5, 2026

**TO:** Adam J. Teitzman, Commission Clerk, Office of Commission Clerk

**FROM:** Ailynnee Ramirez-Abundez, Public Utility Analyst II, Division of Engineering *ARA MR*

**RE:** 20250088-WU - Application for staff-assisted rate case in Lake County by Sun Communities Finance, LLC d/b/a Water Oak Utility.

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Please place the attached emails and corresponding attachments, regarding Water Oak's response to requested information, in the above-referenced docket file.

ARA/da

Attachments

**From:** [McGinn, Daniel](#)  
**To:** [Ailynnee Ramirez-Abundez](#)  
**Cc:** [Marissa Ramos](#)  
**Subject:** RE: (DN 20250088-WU) Water Oak Information  
**Date:** Tuesday, February 24, 2026 3:30:15 PM  
**Attachments:** [635 HH Estimate 1321 from Keeton Enterprises Inc.pdf](#)  
[Keeton Invoice Concrete 635 Hickory Hill.pdf](#)

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CAUTION: This email originated from outside your organization. Exercise caution when opening attachments or clicking links, especially from unknown senders.

Good afternoon,

Please see the responses below.

1. Provide the final invoice(s) for the concrete repair portion of the "15 ft. Water Main Break" project. If not obtained, please explain why.

**Response:** See attached invoices.

2. The contract provided for the Generator and ATS indicated the estimated in-service date to be 28 weeks from the contract approval which was April 16, 2025; therefore, resulting in an estimated in-service date of October 29, 2025. However, it is staff's understanding that this is not yet complete and the Utility is currently utilizing a loaner generator in the interim. Please indicate the current anticipated in-service date of the generator and ATS. As part of your response, please explain the reasons for the delays beyond the original contracted completion date. If an updated in-service date cannot be provided, please explain why.

**Response:** The Utility received updated Estimated Completion Dates from the factory. The new estimated dates for the generator set's completion are from 2/26/26 – 3/13/26. The common carrier can take 2-3 weeks from the manufacture completion date to reach the destination, putting the in-service date around April 3rd.

3. The invoice provided in response to staff's fourth data request for the new 100 HP pump increased by \$123.10 from the contract provided in the Utility's application. Please explain the reason for this increase.

**Response:** Comparing the contract to the invoice, it appears additional materials were needed to complete the project. The contract bid stated the bid was based on "*assumed that all other components were in proper working order*" and it appears that the contractor found some parts to be below that standard.

4. Refer to staff's sixth data request, No. 2. Staff asked the Utility if and how it

addressed the concerns of the customers that spoke at the customer meeting (8 customers). In response, the Utility stated that after the meeting, Water Oak's team met with several customer to review and explain the Utility's process for addressing meter issues and other customer concerns. For clarity, staff requested information for each individual customer that spoke at the Customer Meeting on January 21, 2026 (8 customers).

1. Please provide the details originally requested in No. 2 from staff's sixth data request: "Explain if Water Oak reached out to each customer that commented at the customer meeting? If so, when was contact made, and how were the customer's concerns addressed? If not, please explain why."

**Response:** Staff at the community spoke individually with several residents after the meeting, but did not keep a record of who it specifically talked to as the conversations were face to face. The topic of these discussions centered around the ratemaking process rather than further discussion of customer concerns.

2. Additionally, if Grenelefe replied to the customers in writing, please provide a copy of those responses.

**Response:** N/A (presuming that the intended subject was Water Oak rather than Grenelefe).

5. Pursuant to Rule 25-30.251(1) and (2), Florida Administrative Code, each utility is required to maintain a record of all interruptions in service which affect 10 percent or more of its customers, and to notify the Commission of those interruptions. The record is required to show the cause of the interruption, its date, time, duration, remedy, and steps taken to prevent recurrence. Please provide these Utility records since January 2020 through December 2025.

**Response:** To the best of the Utility's knowledge, they have not had 10% or more of customers affected by a water interruption. The highest impact experienced was roughly 4% per outage. The community uses isolation valves to limit outages to only the section being worked on.

**Daniel J. McGinn** | Special Counsel  
Jones Walker LLP  
D: 850.214.5105  
[dmcginn@joneswalker.com](mailto:dmcginn@joneswalker.com)

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**From:** Ailynee Ramirez-Abundez <ARamirez@psc.state.fl.us>  
**Sent:** Monday, February 23, 2026 3:08 PM  
**To:** McGinn, Daniel <dmcginn@joneswalker.com>  
**Cc:** Marissa Ramos <mramos@psc.state.fl.us>  
**Subject:** [EXTERNAL] RE: (DN 20250088-WU) Water Oak Information

Good afternoon Mr. McGinn,

I left a voicemail today regarding the Water Oak information staff requested on Thursday.

Please provide the Utility's response as soon as possible or by Close of Business tomorrow, Tuesday, February 24, 2026. Let me know if you have any questions.

Thank you,

Ailynee Ramirez-Abundez  
Public Utility Analyst  
Division of Engineering  
Florida Public Service Commission  
[ARamirez@psc.state.fl.us](mailto:ARamirez@psc.state.fl.us)  
(850) 413-6974

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**From:** Ailynee Ramirez-Abundez  
**Sent:** Thursday, February 19, 2026 11:54 AM  
**To:** 'dmcginn@joneswalker.com' <[dmcginn@joneswalker.com](mailto:dmcginn@joneswalker.com)>  
**Cc:** Lee Smith <[lsmith@psc.state.fl.us](mailto:lsmith@psc.state.fl.us)>; Marissa Ramos <[mramos@psc.state.fl.us](mailto:mramos@psc.state.fl.us)>  
**Subject:** (DN 20250088-WU) Water Oak Information

Good morning Mr. McGinn,

Please see the questions below.

1. Provide the final invoice(s) for the concrete repair portion of the "15 ft. Water Main Break" project. If not obtained, please explain why.
2. The contract provided for the Generator and ATS indicated the estimated in-service date to be 28 weeks from the contract approval which was April 16, 2025; therefore, resulting in an estimated in-service date of October 29, 2025. However, it is staff's understanding that this is not yet complete and the Utility is currently utilizing a loaner generator in the interim. Please indicate the current anticipated in-service date of the generator and ATS. As part of your response, please explain the reasons for the delays beyond the original contracted completion date. If an updated in-service date cannot be provided, please explain why.
3. The invoice provided in response to staff's fourth data request for the new 100 HP pump increased by \$123.10 from the contract provided in the Utility's application. Please explain the reason for this increase.
4. Refer to staff's sixth data request, No. 2. Staff asked the Utility if and how it addressed the concerns of the customers that spoke at the customer meeting (8 customers). In response, the Utility stated that after the meeting, Water Oak's team met with several customer to review and explain the Utility's process for

addressing meter issues and other customer concerns. For clarity, staff requested information for each individual customer that spoke at the Customer Meeting on January 21, 2026 (8 customers).

- a. Please provide the details originally requested in No. 2 from staff's sixth data request: "Explain if Water Oak reached out to each customer that commented at the customer meeting? If so, when was contact made, and how were the customer's concerns addressed? If not, please explain why."
  - b. Additionally, if Grenelefe replied to the customers in writing, please provide a copy of those responses.
5. Pursuant to Rule 25-30.251(1) and (2), Florida Administrative Code, each utility is required to maintain a record of all interruptions in service which affect 10 percent or more of its customers, and to notify the Commission of those interruptions. The record is required to show the cause of the interruption, its date, time, duration, remedy, and steps taken to prevent recurrence. Please provide these Utility records since January 2020 through December 2025.

Please let me know if you have any questions.

Thank you,

Ailynee Ramirez-Abundez  
Public Utility Analyst  
Division of Engineering  
Florida Public Service Commission  
[ARamirez@psc.state.fl.us](mailto:ARamirez@psc.state.fl.us)  
(850) 413-6974

**Keeton Enterprises Inc**  
P.O. Box 1424  
UMATILLA, FL 32784 US  
3867177033  
pakkeeton@yahoo.com  
keiconcrete.com

# Estimate

**ADDRESS**

Sun Communities c/o Water Oak  
224 Magnolia Dr.  
Lady Lake, FL 32159

ESTIMATE #	DATE
1321	03/19/2025

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
		Concrete repairs - 635 Hickory Hill			
	<b>Concrete Repairs</b>	Replace concrete driveway - 30 x 14 with flares -	428	7.50	3,210.00
	<b>02.10 Demo</b>	Demo - concrete removal	1	1,200.00	1,200.00
	<b>02.10 Demo</b>	Demo - dumpster fee	1	350.00	350.00

TOTAL

**\$4,760.00**

Accepted By

Accepted Date

Keeton Enterprises Inc  
P.O. Box 1424  
UMATILLA, FL 32784 US  
3867177033  
pakkeeton@yahoo.com  
keiconcrete.com

# Invoice

BILL TO  
Sun Communities c/o Water Oak  
224 Magnolia Dr.  
Lady Lake, FL 32159

INVOICE #	DATE	TOTAL DUE	DUE DATE	TERMS	ENCLOSED
4025	04/03/2025	\$4,760.00	04/18/2025	Net 15	

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
		Concrete repairs - 635 Hickory Hill			
	<b>Concrete Repairs</b>	Replace concrete driveway - 30 x 14 with flares -	428	7.50	3,210.00
	<b>02.10 Demo</b>	Demo - concrete removal	1	1,200.00	1,200.00
	<b>02.10 Demo</b>	Demo - dumpster fee	1	350.00	350.00
		BALANCE DUE			<b>\$4,760.00</b>

**From:** [Marissa Ramos](#)  
**To:** [Ailynnee Ramirez-Abundez](#)  
**Cc:** [Takira Thompson](#)  
**Subject:** Fwd: Water Oak Utility - Follow Up Discussion  
**Date:** Tuesday, March 3, 2026 7:44:50 AM  
**Attachments:** [image001.png](#)

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**From:** McGinn, Daniel <[dmcginn@joneswalker.com](mailto:dmcginn@joneswalker.com)>  
**Sent:** Monday, March 2, 2026 4:36:27 PM  
**To:** Marissa Ramos <[mramos@psc.state.fl.us](mailto:mramos@psc.state.fl.us)>  
**Subject:** Water Oak Utility - Follow Up Discussion

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Good afternoon,

Following up on our call last week, after review of the information provided by the OPC, the Utility determined that in three instances (9/21/20; 12/2/20; 9/22/21) outages exceeded the 10% or greater threshold but were not reported to the Commission. Since that time, improvements to the Utility's infrastructure and the Utility's practice of isolating outages only to those areas that require repair have prevented other disruptions from meeting or exceeding the reporting threshold.

Water Oak understands that any future failure to comply with the notification requirement of paragraph (2) of rule 25-30.251, F.A.C., may result in a show cause action and the potential assessment of a monetary penalty. The Utility reviewed its internal compliance procedures and is implementing additional oversight measures to ensure that all required notifications and filings are submitted accurately and within the prescribed timeframes by working with its partners that provide similar notices to other agencies to ensure that all necessary paperwork is filed. Water Oak is committed to strengthening its compliance processes and to maintaining full adherence to all applicable Commission rules and requirements.

If there are any additional questions, please let us know. The Utility is reviewing other items raised by OPC, and may have additional responses to those items, but we recognize that Staff is working diligently to get their recommendation out and that any response we have may be filed after the release of the Staff's recommendation.

Best,  
-Dan

**Daniel J. McGinn**  
Special Counsel  
D: 850.214.5105  
[dmcginn@joneswalker.com](mailto:dmcginn@joneswalker.com)



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