

PARKER POINTE

**COMMUNITY DEVELOPMENT
DISTRICT**

August 16, 2024

**BOARD OF SUPERVISORS
PUBLIC HEARINGS AND
REGULAR MEETING
AGENDA**

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

AGENDA
LETTER

Parker Pointe Community Development District
OFFICE OF THE DISTRICT MANAGER
2300 Glades Road, Suite 410W•Boca Raton, Florida 33431
Phone: (561) 571-0010•Toll-free: (877) 276-0889•Fax: (561) 571-0013

August 9, 2024

Board of Supervisors
Parker Pointe Community Development District

Dear Board Members:

The Board of Supervisors of the Parker Pointe Community Development District will hold a Public Hearings and a Regular Meeting on August 16, 2024 at 12:00 p.m., or as soon thereafter as the matter may be heard, at the Office Park at California Club, 1031 Ives Dairy Road, Suite 228, Miami, Florida 33179. The agenda is as follows:

1. Call to Order/Roll Call
2. Public Comments
3. Administration of Oath of Office to Supervisor William Fife *(the following will be provided in a separate package)*
 - A. Required Ethics Training and Disclosure Filing
 - Sample Form 1 2023/Instructions
 - B. Membership, Obligation and Responsibilities
 - C. Guide to Sunshine Amendment and Code of Ethics for Public Officers and Employees
 - D. Form 8B: Memorandum of Voting Conflict for County, Municipal and other Local Public Officers
4. Acceptance of Resignation of Tim Smith [Seat 3]
5. Consider Appointment of Debbie Leonard to Fill Unexpired Term of Seat 3; *Term Expires November 2026*
 - Administration of Oath of Office
6. Consideration of Resolution 2024-35, Electing and Removing Officers of the District and Providing for an Effective Date

ATTENDEES:

Please identify yourself each time you speak to facilitate accurate transcription of meeting minutes.

7. Consideration of Resolution 2024-38, Extending the Terms of Office of All Current Supervisors to Coincide with the General Election Pursuant to Section 190.006, Florida Statutes; Providing for Severability; and Providing an Effective Date
8. Public Hearing on Adoption of Fiscal Year 2024/2025 Budget
 - A. Affidavit of Publication
 - B. Consideration of Resolution 2024-39, Relating to the Annual Appropriations and Adopting the Budget(s) for the Fiscal Year Beginning October 1, 2024, and Ending September 30, 2025; Authorizing Budget Amendments; and Providing an Effective Date
9. Public Hearing to Hear Comments and Objections on the Imposition of Maintenance and Operation Assessments to Fund the Budget for Fiscal Year 2024/2025, Pursuant to Florida Law
 - A. Proof/Affidavit of Publication
 - B. Mailed Notice(s) to Property Owners
 - C. Consideration of Resolution 2024-40, Providing for Funding for the Fiscal Year 2025 Adopted Budget(s); Providing for the Collection and Enforcement of Special Assessments, Including but Not Limited to Penalties and Interest Thereon; Certifying an Assessment Roll; Providing for Amendments to the Assessment Roll; Providing a Severability Clause; and Providing an Effective Date
10. Discussion/Consideration: Notice to Commence Facilities Management Services
11. Consideration of Response(s) to Request for Qualifications (RFQ) for Engineering Services
 - A. Affidavit of Publication
 - B. RFQ Package
 - C. Respondent: *Alvarez Engineers, Inc.*
 - D. Competitive Selection Criteria/Ranking
 - E. Award of Contract
12. Recess Regular Meeting/Commencement of Audit Selection Committee Meeting
13. Review of Response to Request for Proposals (RFP) for Annual Audit Services
 - A. Affidavit of Publication
 - B. RFP Package

- C. Respondent
 - Grau & Associates
 - D. Auditor Evaluation Matrix/Ranking
 - 14. Termination of Audit Selection Committee Meeting/Reconvene Regular Meeting
 - 15. Consider Recommendation of Audit Selection Committee
 - Award of Contract
 - 16. Consideration of Goals and Objectives Reporting [HB7013 - Special Districts Performance Measures and Standards Reporting]
 - 17. Ratification of EMMA® Filing Assistance Software as a Service License Agreement
 - 18. Acceptance of Unaudited Financial Statements as of June 30, 2024
 - 19. Approval of May 17, 2024 Regular Meeting Minutes
 - 20. Staff Reports
 - A. District Counsel: *Kutak Rock, LLP*
 - B. District Engineer (Interim): *HSQ Group, LLC*
 - C. District Manager: *Wrathell, Hunt and Associates, LLC*
 - NEXT MEETING DATE: September 20, 2024 at 12:00 PM
 - QUORUM CHECK
- | | | | | | | | |
|--------|----------------|--------------------------|-----------|--------------------------|-------|--------------------------|----|
| SEAT 1 | MICHAEL CAPUTO | ☐ | IN PERSON | ☐ | PHONE | ☐ | NO |
| SEAT 2 | JON SEIFEL | ☐ | IN PERSON | ☐ | PHONE | ☐ | NO |
| SEAT 3 | DEBBIE LEONARD | ☐ | IN PERSON | ☐ | PHONE | ☐ | NO |
| SEAT 4 | JUSTIN FRYE | ☐ | IN PERSON | ☐ | PHONE | ☐ | NO |
| SEAT 5 | WILLIAM FIFE | ☐ | IN PERSON | ☐ | PHONE | ☐ | NO |
- 21. Board Members' Comments/Requests
 - 22. Public Comments
 - 23. Adjournment

Should have any questions or concerns, please do not hesitate to contact me directly at (561) 909-7930 or Andrew Kantarzhi at (415) 516-2161.

Sincerely,



Daniel Rom
District Manager

FOR BOARD MEMBERS AND STAFF TO ATTEND BY TELEPHONE

CALL-IN NUMBER: 1-888-354-0094

PARTICIPANT PASSCODE: 528 064 2804

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

3A

MEMORANDUM

To: Board of Supervisors

From: District Counsel

Date: January 1, 2024

Subject: Ethics Training Requirements

Beginning January 1, 2024, all Board Supervisors of Florida Community Development Districts will be required to complete four (4) hours of Ethics training each year. The four (4) hours must be allocated to the following categories: two (2) hours of Ethics Law, one (1) hour of Sunshine Law, and one (1) hour of Public Records law.

This training may be completed online, and the four (4) hours do not have to be completed all at once. The Florida Commission on Ethics (“COE”) has compiled a list of resources for this training. An overview of the resources are described below, and links to the resources are included in this memo.

Each year when Supervisors complete the required financial disclosure form (Form 1 Statement of Financial Interests), Supervisors must mark a box confirming that he or she has completed the Ethics training requirements. At this time, there is no requirement to submit a certificate; however, the COE advises that Supervisors keep a record of all trainings completed (including date and time of completion), in the event Supervisors are ever asked to provide proof of completion. The training is a calendar year requirement and corresponds to the form year. So, Supervisors will not report their 2024 training until they fill out their Form 1 for the 2025 year.

Free Training Options

The Florida Commission on Ethics’ (“COE”) website has several free online resources and links to resources that Supervisors can access to complete the training requirements. Navigate to that page here: [Florida Commission on Ethics Training](https://ethics.state.fl.us/Training/Training.aspx).¹ Please note that the COE only provides free training for the two (2) hour Ethics portion of the annual training. However, the COE does provide links to free outside resources to complete the Sunshine and Public Records portion of the training. These links are included in this memorandum below for your ease of reference.

¹ <https://ethics.state.fl.us/Training/Training.aspx>

Free Ethics Law Training

The COE provides several videos for Ethics training, none of which are exactly two (2) hours in length. Please ensure you complete 120 minutes of Ethics training when choosing a combination of the below.

State Ethics Laws for Constitutional Officers & Elected Municipal Officers (100 minutes)

Click here: [Kinetic Ethics](#)

Business and Employment Conflicts and Post-Public-Service (56 minutes) Restriction

Click here: [Business and Employment Conflicts](#)

Gifts (50 minutes)

Click here: [Ethics Laws Governing Acceptance of Gifts](#)

Voting Conflicts - Local Officers (58 minutes)¹

Click here: [Voting Vertigo](#)

Free Sunshine/Public Records Law Training

The Office of the Attorney General provides a two (2) hour online training course (audio only) that meets the requirements of the Sunshine Law and Public Records Law portion of Supervisors' annual training.

Click here to access: [Public Meeting and Public Records Law](#)

Other Training Options

4- Hour Course

Some courses will provide a certificate upon completion (not required), like the one found from the Florida State University, Florida Institute of Government, linked here: [4-Hour Ethics Course](#). This course meets all the ethics training requirements for the year, including Sunshine Law and Public Records training. This course is currently \$79.00

CLE Course

The COE's website includes a link to the Florida Bar's Continuing Legal Education online tutorial which also meets all the Ethics training requirements. However, this is a CLE course designed more specifically for attorneys. The 5 hours 18 minutes' long course exceeds the 4-hour requirement and its cost is significantly higher than the 4-Hour Ethics course provided by the Florida State University. The course is currently \$325.00. To access this course, click here: [Sunshine Law, Public Records and Ethics for Public Officers and Public Employees](#).

If you have any questions, please do not hesitate to contact me.

2023 Form 1 - Statement of Financial Interests

General Information

Name: DISCLOSURE FILER

Address: SAMPLE ADDRESS

County: SAMPLE COUNTY

PID SAMPLE

AGENCY INFORMATION

Organization	Suborganization	Title
SAMPLE	SAMPLE	SAMPLE

Disclosure Period

THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR CALENDAR YEAR ENDING DECEMBER 31, 2023 .

Primary Sources of Income

PRIMARY SOURCE OF INCOME (Over \$2,500) (Major sources of income to the reporting person)
(If you have nothing to report, write "none" or "n/a")

Name of Source of Income	Source's Address	Description of the Source's Principal Business Activity

Secondary Sources of Income

SECONDARY SOURCES OF INCOME (Major customers, clients, and other sources of income to businesses owned by the reporting person) (If you have nothing to report, write "none" or "n/a")

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source

Real Property

REAL PROPERTY (Land, buildings owned by the reporting person)
(If you have nothing to report, write "none" or "n/a")

Location/Description

Intangible Personal Property

INTANGIBLE PERSONAL PROPERTY (Stocks, bonds, certificates of deposit, etc. over \$10,000)
(If you have nothing to report, write "none" or "n/a")

Type of Intangible	Business Entity to Which the Property Relates

Liabilities

LIABILITIES (Major debts valued over \$10,000):
(If you have nothing to report, write "none" or "n/a")

Name of Creditor	Address of Creditor

Interests in Specified Businesses

INTERESTS IN SPECIFIED BUSINESSES (Ownership or positions in certain types of businesses)
(If you have nothing to report, write "none" or "n/a")

Business Entity # 1

Training

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you for this form year.

Signature of Filer

Digitally signed:

Filed with COE:

E-FILING SAMPLE

2023 Form 1 Instructions

Statement of Financial Interests

Notice

The annual Statement of Financial Interest is due July 1, 2024. If the annual form is not submitted via the electronic filing system created and maintained by the Commission September 3, 2024, an automatic fine of \$25 for each day late will be imposed, up to a maximum penalty of \$1,500. Failure to file also can result in removal from public office or employment. [s. 112.3145, F.S.]

In addition, failure to make any required disclosure constitutes grounds for and may be punished by one or more of the following: disqualification from being on the ballot, impeachment, removal or suspension from office or employment, demotion, reduction in salary, reprimand, or a civil penalty not exceeding \$10,000. [s. 112.317, F.S.]

When To File:

Initially, each local officer/employee, state officer, and specified state employee must file **within 30 days** of the date of his or her appointment or of the beginning of employment. Appointees who must be confirmed by the Senate must file prior to confirmation, even if that is less than 30 days from the date of their appointment.

Candidates must file at the same time they file their qualifying papers.

Thereafter, file by July 1 following each calendar year in which they hold their positions.

Finally, file a final disclosure form (Form 1F) within 60 days of leaving office or employment. Filing a CE Form 1F (Final Statement of Financial Interests) does not relieve the filer of filing a CE Form 1 if the filer was in his or her position on December 31, 2023.

Who Must File Form 1

1. Elected public officials not serving in a political subdivision of the state and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
2. Appointed members of each board, commission, authority, or council having statewide jurisdiction, excluding those required to file full disclosure on Form 6 as well as members of solely advisory bodies, but including judicial nominating commission members; Directors of Enterprise Florida, Scripps Florida Funding Corporation, and Career Source Florida; and members of the Council on the Social Status of Black Men and Boys; the Executive Director, Governors, and senior managers of Citizens Property Insurance Corporation; Governors and senior managers of Florida Workers' Compensation Joint Underwriting Association; board members of the Northeast Fla. Regional Transportation Commission; board members of Triumph Gulf Coast, Inc; board members of Florida Is For Veterans, Inc.; and members of the Technology Advisory Council within the Agency for State Technology.
3. The Commissioner of Education, members of the State Board of Education, the Board of Governors, the local Boards of Trustees and Presidents of state universities, and the Florida Prepaid College Board.
4. Persons elected to office in any political subdivision (such as municipalities, counties, and special districts) and any person appointed to fill a vacancy in such office, unless required to file Form 6.
5. Appointed members of the following boards, councils, commissions, authorities, or other bodies of county, municipality, school district, independent special district, or other political subdivision: the governing body of the subdivision; community college or junior college district boards of trustees; boards having the power to enforce local code provisions; boards of adjustment; community redevelopment agencies; planning or zoning boards having the power to recommend, create, or modify land planning or zoning within a political subdivision, except for citizen advisory committees, technical coordinating committees, and similar groups who only have the power to make recommendations to planning or zoning boards, and except for representatives of a military installation acting on behalf of all military installations within that jurisdiction; pension or retirement boards empowered to invest pension or retirement funds or determine entitlement to or amount of pensions or other retirement benefits, and the Pinellas County Construction Licensing Board.
6. Any appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.
7. Persons holding any of these positions in local government: county or city manager; chief administrative employee or finance director of a county, municipality, or other political subdivision; county or municipal attorney; chief county or municipal building inspector; county or municipal water resources coordinator; county or municipal pollution control director; county or municipal environmental control director; county or municipal administrator with power to grant or deny a land development permit; chief of police; fire chief; municipal clerk; appointed district school superintendent; community college president; district medical examiner; purchasing agent (regardless of title) having the authority to make any purchase exceeding \$35,000 for the local governmental unit.

8. Officers and employees of entities serving as chief administrative officer of a political subdivision.
9. Members of governing boards of charter schools operated by a city or other public entity.
10. Employees in the office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.
11. The following positions in each state department, commission, board, or council: Secretary, Assistant or Deputy Secretary, Executive Director, Assistant or Deputy Executive Director, and anyone having the power normally conferred upon such persons, regardless of title.
12. The following positions in each state department or division: Director, Assistant or Deputy Director, Bureau Chief, and any person having the power normally conferred upon such persons, regardless of title.
13. Assistant State Attorneys, Assistant Public Defenders, criminal conflict and civil regional counsel, and assistant criminal conflict and civil regional counsel, Public Counsel, full-time state employees serving as counsel or assistant counsel to a state agency, administrative law judges, and hearing officers.
14. The Superintendent or Director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.
15. State agency Business Managers, Finance and Accounting Directors, Personnel Officers, Grant Coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$35,000.
16. The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions and legislative assistants exempted by the presiding officer of their house); and each employee of the Commission on Ethics.
17. Each member of the governing body of a "large-hub commercial service airport," as defined in Section 112.3144(1)(c), Florida Statutes, except for members required to comply with the financial disclosure requirements of s. 8, Article II of the State Constitution.

ATTACHMENTS: A filer may include and submit attachments or other supporting documentation when filing disclosure.

PUBLIC RECORD: The disclosure form is a public record and is required by law to be posted to the Commission's website. Your Social Security number, bank account, debit, charge, and credit card numbers, mortgage or brokerage account numbers, personal identification numbers, or taxpayer identification numbers are not required and should not be included. If such information is included in the filing, it may be made available for public inspection and copying unless redaction is required by the filer, without any liability to the Commission. If you are an active or former officer or employee listed in Section 119.071, F.S., whose home address or other information is exempt from disclosure, the Commission will maintain that confidentiality *if you submit a written and notarized request.*

QUESTIONS about this form or the ethics laws may be addressed to the Commission on Ethics, Post Office Drawer 15709, Tallahassee, Florida 32317-5709; physical address: 325 John Knox Road, Building E, Suite 200, Tallahassee, FL 32303; telephone (850) 488-7864.

Instructions for Completing Form 1

Primary Sources of Income

[Required by s. 112.3145(3)(b)1, F.S.]

This section is intended to require the disclosure of your principal sources of income during the disclosure period. You do not have to disclose any public salary or public position(s). The income of your spouse need not be disclosed; however, if there is joint income to you and your spouse from property you own jointly (such as interest or dividends from a bank account or stocks), you should disclose the source of that income if it exceeded the threshold.

Please list in this part of the form the name, address, and principal business activity of each source of your income which exceeded \$2,500 of gross income received by you in your own name or by any other person for your use or benefit.

"Gross income" means the same as it does for income tax purposes, even if the income is not actually taxable, such as interest on tax-free bonds. Examples include: compensation for services, income from business, gains from property dealings, interest, rents, dividends, pensions, IRA distributions, social security, distributive share of partnership gross income, and alimony if considered gross income under federal law, but not child support.

Examples:

- If you were employed by a company that manufactures computers and received more than \$2,500, list the name of the company, its address, and its principal business activity (computer manufacturing).
- If you were a partner in a law firm and your distributive share of partnership gross income exceeded \$2,500, list the name of the firm, its address, and its principal business activity (practice of law).
- If you were the sole proprietor of a retail gift business and your gross income from the business exceeded \$2,500, list the name of the business, its address, and its principal business activity (retail gift sales).
- If you received income from investments in stocks and bonds, list each individual company from which you derived more than \$2,500. Do not aggregate all of your investment income.

- If more than \$2,500 of your gross income was gain from the sale of property (not just the selling price), list as a source of income the purchaser's name, address and principal business activity. If the purchaser's identity is unknown, such as where securities listed on an exchange are sold through a brokerage firm, the source of income should be listed as "sale of (name of company) stock," for example.
- If more than \$2,500 of your gross income was in the form of interest from one particular financial institution (aggregating interest from all CD's, accounts, etc., at that institution), list the name of the institution, its address, and its principal business activity.

Secondary Sources of Income

[Required by s. 112.3145(3)(b)2, F.S.]

This part is intended to require the disclosure of major customers, clients, and other sources of income to businesses in which you own an interest. It is not for reporting income from second jobs. That kind of income should be reported in "Primary Sources of Income," if it meets the reporting threshold. You will not have anything to report unless, during the disclosure period:

1. You owned (either directly or indirectly in the form of an equitable or beneficial interest) more than 5% of the total assets or capital stock of a business entity (a corporation, partnership, LLC, limited partnership, proprietorship, joint venture, trust, firm, etc., doing business in Florida); **and,**
2. You received more than \$5,000 of your gross income during the disclosure period from that business entity.

If your interests and gross income exceeded these thresholds, then for that business entity you must list every source of income to the business entity which exceeded 10% of the business entity's gross income (computed on the basis of the business entity's most recently completed fiscal year), the source's address, and the source's principal business activity.

Examples:

- You are the sole proprietor of a dry cleaning business, from which you received more than \$5,000. If only one customer, a uniform rental company, provided more than 10% of your dry cleaning business, you must list the name of the uniform rental company, its address, and its principal business activity (uniform rentals).
- You are a 20% partner in a partnership that owns a shopping mall and your partnership income exceeded the above thresholds. List each tenant of the mall that provided more than 10% of the partnership's gross income and the tenant's address and principal business activity.

Real Property

[Required by s. 112.3145(3)(b)3, F.S.]

In this part, list the location or description of all real property in Florida in which you owned directly or indirectly at any time during the disclosure period in excess of 5% of the property's value. You are not required to list your residences. You should list any vacation homes if you derive income from them.

Indirect ownership includes situations where you are a beneficiary of a trust that owns the property, as well as situations where you own more than 5% of a partnership or corporation that owns the property. The value of the property may be determined by the most recently assessed value for tax purposes, in the absence of a more accurate fair market value.

The location or description of the property should be sufficient to enable anyone who looks at the form to identify the property. A street address should be used, if one exists.

Intangible Personal Property

[Required by s. 112.3145(3)(b)3, F.S.]

Describe any intangible personal property that, at any time during the disclosure period, was worth more than \$10,000 and state the business entity to which the property related. Intangible personal property includes things such as cash on hand, stocks, bonds, certificates of deposit, vehicle leases, interests in businesses, beneficial interests in trusts, money owed you (including, but not limited to, loans made as a candidate to your own campaign), Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts in which you have an ownership interest. Intangible personal property also includes investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, CDs and savings accounts with the same bank. Property owned as tenants by the entirety or as joint tenants with right of survivorship, including bank accounts owned in such a manner, should be valued at 100%. The value of a leased vehicle is the vehicle's present value minus the lease residual (a number found on the lease document).

Liabilities

[Required by s. 112.3145(3)(b)4, F.S.]

List the name and address of each creditor to whom you owed more than \$10,000 at any time during the disclosure period. The amount of the liability of a vehicle lease is the sum of any past-due payments and all unpaid prospective lease payments. You are not required to list the amount of any debt. You do not have to disclose credit card and retail installment accounts, taxes owed (unless reduced to a judgment), indebtedness on a life insurance policy owed to the company of issuance, or contingent liabilities. A "contingent liability" is one that will become an actual liability only when one or more future events occur or fail to occur, such as where you are liable only as a guarantor, surety, or endorser on a promissory note. If you are a "co-maker" and are jointly liable or jointly and severally liable, then it is not a contingent liability.

Interests in Specified Businesses

[Required by s. 112.3145(7), F.S.]

The types of businesses covered in this disclosure include: state and federally chartered banks; state and federal savings and loan associations; cemetery companies; insurance companies; mortgage companies; credit unions; small loan companies; alcoholic beverage licensees; pari-mutuel wagering companies, utility companies, entities controlled by the Public Service Commission; and entities granted a franchise to operate by either a city or a county government.

Disclose in this part the fact that you owned during the disclosure period an interest in, or held any of certain positions with the types of businesses listed above. You must make this disclosure if you own or owned (either directly or indirectly in the form of an equitable or beneficial interest) at any time during the disclosure period more than 5% of the total assets or capital stock of one of the types of business entities listed above. You also must complete this part of the form for each of these types of businesses for which you are, or were at any time during the disclosure period, an officer, director, partner, proprietor, or agent (other than a resident agent solely for service of process).

If you have or held such a position or ownership interest in one of these types of businesses, list the name of the business, its address and principal business activity, and the position held with the business (if any). If you own(ed) more than a 5% interest in the business, indicate that fact and describe the nature of your interest.

Training Certification

[Required by s. 112.3142, F.S.]

If you are a Constitutional or elected municipal officer appointed school superintendent, a commissioner of a community redevelopment agency created under Part III, Chapter 163, or an elected local officers of independent special districts, including any person appointed to fill a vacancy on an elected special district board, whose service began on or before March 31 of the year for which you are filing, you are required to complete four hours of ethics training which addresses Article II, Section 8 of the Florida Constitution, the Code of Ethics for Public Officers and Employees, and the public records and open meetings laws of the state. You are required to certify on this form that you have taken such training.

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

3B

BOARD OF SUPERVISORS

MEMBERSHIP, OBLIGATIONS AND RESPONSIBILITIES

A Community Development District ("District") is a special-purpose unit of local government which is established pursuant to and governed by Chapter 190, Florida Statutes.

The Board

The Community Development District ("District") is governed by a five (5)-member Board of Supervisors ("Board"). Member of the Board "Supervisor(s)" are elected in accordance with Section 190.006, F.S., either upon a one (1)-vote per one (1)-acre basis ("landowner voting") or through traditional elections ("resident voting"), depending upon the number of registered voters in the District and the length of time which has passed since the establishment of the District.

A CDD Board typically meets once per month, but may meet more often if necessary. Board meetings typically last from one (1) to three (3) hours, depending upon the business to be conducted by the Board. Prior to the meeting, each Supervisor is supplied with an agenda package which will contain the documents pertaining to the business to be considered by the Board at a particular meeting. A Supervisor should be willing to spend time reviewing these packages prior to each meeting, and may consult with District Staff (General Counsel, Management, Engineering, etc.) concerning the business to be addressed.

Qualifications of Supervisors

Each Supervisor must be a resident of the state of Florida and a citizen of the United States. Once a District has transitioned to resident voting, Supervisors must also be residents of the District.

Compensation

By statute, Board Members are entitled to be paid \$200 per meeting for their service, up to an annual cap of \$4,800 per year. To achieve the statutory cap, the District would have to meet twice each month, which is rare.

Sometimes Supervisors who are employees of the primary landowner waive their right to compensation, although this is not always the case.

Responsibilities of Supervisors

The position of Supervisor is that of an elected local public official. It is important to always remember that serving as an elected public official of a District carries with it certain restrictions and obligations. Each Supervisor, upon taking office, must subscribe to an oath of office acknowledging that he/she is a public officer, and as a recipient of public funds, a supporter of the constitutions of the State of Florida and of the United States of America.

Each Supervisor is subject to the same financial disclosure requirements as any other local elected official and must file a Statement of Financial Interests disclosing

sources of income, assets, debts, and other financial data, with the Supervisor of Elections in the County where he/she resides.

A Supervisor must act in accordance with the Code of Ethics for Public Officers and Employees, codified at Part III, Chapter 112, F.S., which addresses acceptance of gifts, conflicts of interest, etc. By law, it is not a conflict of interest for an employee of the developer to serve on a CDD Board of Supervisors.

Since a District is a unit of local government, the Sunshine Law (Chapter 286, F.S.) applies to Districts and to the Supervisors who govern them. In brief, the Sunshine Law states that two(2) or more Supervisors may never meet outside of a publicly noticed meeting of the Board and/to discuss District business.

Florida's Public Records Law (Chapter 119, F.S.) also applies to Districts and Supervisors. All records of the District, and the records of each individual Supervisor relating to the District, are public records. As such, any member of the public may inspect them upon request. Supervisors are therefore urged to keep any District records or documents in a separate file to allow ease of access by the public or press.

Conclusion

The position of Supervisor of a Community Development District is an important one, requiring both the time and the dedication to fulfill the responsibilities of a position of public trust. It should not be undertaken lightly. Each new Supervisor should enter office fully cognizant of the ethical, legal, and time requirements which are incumbent upon those who serve as Supervisors.

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

3C

FLORIDA COMMISSION ON ETHICS



GUIDE to the SUNSHINE AMENDMENT and CODE of ETHICS for Public Officers and Employees

2024

State of Florida

COMMISSION ON ETHICS

Ashley Lukis, *Chair*
Tallahassee

Michelle Anchors, *Vice Chair*
Fort Walton Beach

William P. Cervone
Gainesville

Tina Descovich
Indianapolis

Freddie Figgers
Fort Lauderdale

Luis M. Fusté
Coral Gables

Wengay M. Newton, Sr.
St. Petersburg

Kerrie Stillman
Executive Director
P.O. Drawer 15709
Tallahassee, FL 32317-5709
www.ethics.state.fl.us
(850) 488-7864*

*Please direct all requests for information to this number.

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I. HISTORY OF FLORIDA'S ETHICS LAWS

Florida has been a leader among the states in establishing ethics standards for public officials and recognizing the right of citizens to protect the public trust against abuse. Our state Constitution was revised in 1968 to require a code of ethics, prescribed by law, for all state employees and non-judicial officers prohibiting conflict between public duty and private interests.

Florida's first successful constitutional initiative resulted in the adoption of the Sunshine Amendment in 1976, providing additional constitutional guarantees concerning ethics in government. In the area of enforcement, the Sunshine Amendment requires that there be an independent commission (the Commission on Ethics) to investigate complaints concerning breaches of public trust by public officers and employees other than judges.

The Code of Ethics for Public Officers and Employees is found in Chapter 112 (Part III) of the Florida Statutes. Foremost among the goals of the Code is to promote the public interest and maintain the respect of the people for their government. The Code is also intended to ensure that public officials conduct themselves independently and impartially, not using their offices for private gain other than compensation provided by law. While seeking to protect the integrity of government, the Code also seeks to avoid the creation of unnecessary barriers to public service.

Criminal penalties, which initially applied to violations of the Code, were eliminated in 1974 in favor of administrative enforcement. The Legislature created the Commission on Ethics that year "to serve as guardian of the standards of conduct" for public officials, state and local. Five of the Commission's nine members are appointed by the Governor, and two each are appointed by the President of the Senate and Speaker of the House of Representatives. No more than five Commission members may be members of the same political party, and none may be lobbyists, or hold any public employment during their two-year terms of office. A chair is selected from among the members to serve a one-year term and may not succeed himself or herself.

II. ROLE OF THE COMMISSION ON ETHICS

In addition to its constitutional duties regarding the investigation of complaints, the Commission:

- Renders advisory opinions to public officials;
- Prescribes forms for public disclosure;
- Prepares mailing lists of public officials subject to financial disclosure for use by Supervisors of Elections and the Commission in distributing forms and notifying delinquent filers;
- Makes recommendations to disciplinary officials when appropriate for violations of ethics and disclosure laws, since it does not impose penalties;
- Administers the Executive Branch Lobbyist Registration and Reporting Law;
- Maintains financial disclosure filings of constitutional officers and state officers and employees; and,
- Administers automatic fines for public officers and employees who fail to timely file required annual financial disclosure.

III. THE ETHICS LAWS

The ethics laws generally consist of two types of provisions, those prohibiting certain actions or conduct and those requiring that certain disclosures be made to the public. The following descriptions of these laws have been simplified in an effort to provide notice of their requirements. Therefore, we suggest that you also review the wording of the actual law. Citations to the appropriate laws are in brackets.

The laws summarized below apply generally to all public officers and employees, state and local, including members of advisory bodies. The principal exception to this broad coverage is the exclusion of judges, as they fall within the jurisdiction of the Judicial Qualifications Commission.

Public Service Commission (PSC) members and employees, as well as members of the PSC Nominating Council, are subject to additional ethics standards that are enforced by the Commission on Ethics under Chapter 350, Florida Statutes. Further, members of the governing boards of charter schools are subject to some of the provisions of the Code of Ethics [Sec. 1002.33(26), Fla. Stat.], as are the officers, directors, chief executive officers and some employees of business entities that serve as the chief administrative or executive officer or employee of a political subdivision. [Sec. 112.3136, Fla. Stat.].

A. PROHIBITED ACTIONS OR CONDUCT

1. Solicitation and Acceptance of Gifts

Public officers, employees, local government attorneys, and candidates are prohibited from soliciting or accepting anything of value, such as a gift, loan, reward, promise of future employment, favor, or service, that is based on an understanding that their vote, official action, or judgment would be influenced by such gift. [Sec. 112.313(2), Fla. Stat.]

Persons required to file financial disclosure FORM 1 or FORM 6 (see Part III F of this brochure), and state procurement employees, are prohibited from **soliciting** any gift from a political committee, lobbyist who has lobbied the official or his or her agency within the past 12 months, or the partner, firm, employer, or principal of such a lobbyist or from a vendor doing business with the official's agency. [Sec. 112.3148, Fla. Stat.]

Persons required to file FORM 1 or FORM 6, and state procurement employees are prohibited from directly or indirectly **accepting** a gift worth more than \$100 from such a lobbyist, from a partner, firm, employer, or principal of the lobbyist, or from a political committee or vendor doing business with their agency. [Sec. 112.3148, Fla. Stat.]

However, notwithstanding Sec. 112.3148, Fla. Stat., no Executive Branch lobbyist or principal shall make, directly or indirectly, and no Executive Branch agency official who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.] Typically, this would include gifts valued at less than \$100 that formerly

were permitted under Section 112.3148, Fla. Stat. Similar rules apply to members and employees of the Legislature. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.]

Also, persons required to file Form 1 or Form 6, and state procurement employees and members of their immediate families, are prohibited from accepting any gift from a political committee. [Sec. 112.31485, Fla. Stat.]

2. Unauthorized Compensation

Public officers or employees, local government attorneys, and their spouses and minor children are prohibited from accepting any compensation, payment, or thing of value when they know, or with the exercise of reasonable care should know, that it is given to influence a vote or other official action. [Sec. 112.313(4), Fla. Stat.]

3. Misuse of Public Position

Public officers and employees, and local government attorneys are prohibited from corruptly using or attempting to use their official positions or the resources thereof to obtain a special privilege or benefit for themselves or others. [Sec. 112.313(6), Fla. Stat.]

4. Abuse of Public Position

Public officers and employees are prohibited from abusing their public positions in order to obtain a disproportionate benefit for themselves or certain others. [Article II, Section 8(h), Florida Constitution.]

5. Disclosure or Use of Certain Information

Public officers and employees and local government attorneys are prohibited from disclosing or using information not available to the public and obtained by reason of their public position, for the personal benefit of themselves or others. [Sec. 112.313(8), Fla. Stat.]

6. *Solicitation or Acceptance of Honoraria*

Persons required to file financial disclosure FORM 1 or FORM 6 (see Part III F of this brochure), and state procurement employees, are prohibited from **soliciting** honoraria related to their public offices or duties. [Sec. 112.3149, Fla. Stat.]

Persons required to file FORM 1 or FORM 6, and state procurement employees, are prohibited from knowingly **accepting** an honorarium from a political committee, lobbyist who has lobbied the person's agency within the past 12 months, or the partner, firm, employer, or principal of such a lobbyist, or from a vendor doing business with the official's agency. However, they may accept the payment of expenses related to an honorarium event from such individuals or entities, provided that the expenses are disclosed. See Part III F of this brochure. [Sec. 112.3149, Fla. Stat.]

Lobbyists and their partners, firms, employers, and principals, as well as political committees and vendors, are prohibited from **giving** an honorarium to persons required to file FORM 1 or FORM 6 and to state procurement employees. Violations of this law may result in fines of up to \$5,000 and prohibitions against lobbying for up to two years. [Sec. 112.3149, Fla. Stat.]

However, notwithstanding Sec. 112.3149, Fla. Stat., no Executive Branch or legislative lobbyist or principal shall make, directly or indirectly, and no Executive Branch agency official who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.] This may include honorarium event related expenses that formerly were permitted under Sec. 112.3149, Fla. Stat. Similar rules apply to members and employees of the Legislature. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.]

B. **PROHIBITED EMPLOYMENT AND BUSINESS RELATIONSHIPS**

1. *Doing Business With One's Agency*

- a) A public employee acting as a purchasing agent, or public officer acting in an official capacity, is prohibited from purchasing, renting, or leasing any realty, goods, or

services for his or her agency from a business entity in which the officer or employee or his or her spouse or child owns more than a 5% interest. [Sec. 112.313(3), Fla. Stat.]

- b) A public officer or employee, acting in a private capacity, also is prohibited from renting, leasing, or selling any realty, goods, or services to his or her own agency if the officer or employee is a state officer or employee, or, if he or she is an officer or employee of a political subdivision, to that subdivision or any of its agencies. [Sec. 112.313(3), Fla. Stat.]

2. *Conflicting Employment or Contractual Relationship*

- a) A public officer or employee is prohibited from holding any employment or contract with any business entity or agency regulated by or doing business with his or her public agency. [Sec. 112.313(7), Fla. Stat.]
- b) A public officer or employee also is prohibited from holding any employment or having a contractual relationship which will pose a frequently recurring conflict between the official's private interests and public duties or which will impede the full and faithful discharge of the official's public duties. [Sec. 112.313(7), Fla. Stat.]
- c) Limited exceptions to this prohibition have been created in the law for legislative bodies, certain special tax districts, drainage districts, and persons whose professions or occupations qualify them to hold their public positions. [Sec. 112.313(7)(a) and (b), Fla. Stat.]

3. *Exemptions*—Pursuant to Sec. 112.313(12), Fla. Stat., the prohibitions against doing business with one's agency and having conflicting employment may not apply:

- a) When the business is rotated among all qualified suppliers in a city or county.
- b) When the business is awarded by sealed, competitive bidding and neither the official nor his or her spouse or child have attempted to persuade agency personnel to enter

the contract. NOTE: Disclosure of the interest of the official, spouse, or child and the nature of the business must be filed prior to or at the time of submission of the bid on Commission FORM 3A with the Commission on Ethics or Supervisor of Elections, depending on whether the official serves at the state or local level.

- c) When the purchase or sale is for legal advertising, utilities service, or for passage on a common carrier.
- d) When an emergency purchase must be made to protect the public health, safety, or welfare.
- e) When the business entity is the only source of supply within the political subdivision and there is full disclosure of the official's interest to the governing body on Commission FORM 4A.
- f) When the aggregate of any such transactions does not exceed \$500 in a calendar year.
- g) When the business transacted is the deposit of agency funds in a bank of which a county, city, or district official is an officer, director, or stockholder, so long as agency records show that the governing body has determined that the member did not favor his or her bank over other qualified banks.
- h) When the prohibitions are waived in the case of ADVISORY BOARD MEMBERS by the appointing person or by a two-thirds vote of the appointing body (after disclosure on Commission FORM 4A).
- i) When the public officer or employee purchases in a private capacity goods or services, at a price and upon terms available to similarly situated members of the general public, from a business entity which is doing business with his or her agency.
- j) When the public officer or employee in a private capacity purchases goods or services from a business entity which is subject to the regulation of his or her agency where the price and terms of the transaction are available to similarly situated members of

the general public and the officer or employee makes full disclosure of the relationship to the agency head or governing body prior to the transaction.

4. *Additional Exemptions*

No elected public officer is in violation of the conflicting employment prohibition when employed by a tax exempt organization contracting with his or her agency so long as the officer is not directly or indirectly compensated as a result of the contract, does not participate in any way in the decision to enter into the contract, abstains from voting on any matter involving the employer, and makes certain disclosures. [Sec. 112.313(15), Fla. Stat.]

5. *Legislators Lobbying State Agencies*

A member of the Legislature is prohibited from representing another person or entity for compensation during his or her term of office before any state agency other than judicial tribunals. [Art. II, Sec. 8(e), Fla. Const., and Sec. 112.313(9), Fla. Stat.]

6. *Additional Lobbying Restrictions for Certain Public Officers and Employees*

A statewide elected officer; a member of the legislature; a county commissioner; a county officer pursuant to Article VIII or county charter; a school board member; a superintendent of schools; an elected municipal officer; an elected special district officer in a special district with ad valorem taxing authority; or a person serving as a secretary, an executive director, or other agency head of a department of the executive branch of state government shall not lobby for compensation on issues of policy, appropriations, or procurement before the federal government, the legislature, any state government body or agency, or any political subdivision of this state, during his or her term of office. [Art. II Sec 8(f)(2), Fla. Const. and Sec. 112.3121, Fla. Stat.]

7. *Employees Holding Office*

A public employee is prohibited from being a member of the governing body which serves as his or her employer. [Sec. 112.313(10), Fla. Stat.]

8. *Professional and Occupational Licensing Board Members*

An officer, director, or administrator of a state, county, or regional professional or occupational organization or association, while holding such position, may not serve as a member of a state examining or licensing board for the profession or occupation. [Sec. 112.313(11), Fla. Stat.]

9. *Contractual Services: Prohibited Employment*

A state employee of the executive or judicial branch who participates in the decision-making process involving a purchase request, who influences the content of any specification or procurement standard, or who renders advice, investigation, or auditing, regarding his or her agency's contract for services, is prohibited from being employed with a person holding such a contract with his or her agency. [Sec. 112.3185(2), Fla. Stat.]

10. *Local Government Attorneys*

Local government attorneys, such as the city attorney or county attorney, and their law firms are prohibited from representing private individuals and entities before the unit of local government which they serve. A local government attorney cannot recommend or otherwise refer to his or her firm legal work involving the local government unit unless the attorney's contract authorizes or mandates the use of that firm. [Sec. 112.313(16), Fla. Stat.]

11. *Dual Public Employment*

Candidates and elected officers are prohibited from accepting public employment if they know or should know it is being offered for the purpose of influence. Further, public employment may not be accepted unless the position was already in existence or was created without the anticipation of the official's interest, was publicly advertised, and the officer had to meet the same qualifications and go through the same hiring process as other applicants. For elected public officers already holding public employment, no promotion given for the purpose of influence may be accepted, nor may promotions that are inconsistent with those given other similarly situated employees. [Sec. 112.3125, Fla. Stat.]

C. RESTRICTIONS ON APPOINTING, EMPLOYING, AND CONTRACTING WITH RELATIVES

1. *Anti-Nepotism Law*

A public official is prohibited from seeking for a relative any appointment, employment, promotion, or advancement in the agency in which he or she is serving or over which the official exercises jurisdiction or control. No person may be appointed, employed, promoted, or advanced in or to a position in an agency if such action has been advocated by a related public official who is serving in or exercising jurisdiction or control over the agency; this includes relatives of members of collegial government bodies. NOTE: This prohibition does not apply to school districts (except as provided in Sec. 1012.23, Fla. Stat.), community colleges and state universities, or to appointments of boards, other than those with land-planning or zoning responsibilities, in municipalities of fewer than 35,000 residents. Also, the approval of budgets does not constitute “jurisdiction or control” for the purposes of this prohibition. This provision does not apply to volunteer emergency medical, firefighting, or police service providers. [Sec. 112.3135, Fla. Stat.]

2. *Additional Restrictions*

A state employee of the executive or judicial branch or the PSC is prohibited from directly or indirectly procuring contractual services for his or her agency from a business entity of which a relative is an officer, partner, director, or proprietor, or in which the employee, or his or her spouse, or children own more than a 5% interest. [Sec. 112.3185(6), Fla. Stat.]

D. POST OFFICE HOLDING AND EMPLOYMENT (REVOLVING DOOR) RESTRICTIONS

1. *Lobbying by Former Legislators, Statewide Elected Officers, and Appointed State Officers*

A member of the Legislature or a statewide elected or appointed state official is prohibited for two years following vacation of office from representing another person or entity for compensation before the government body or agency of which the individual was an officer or member. Former members of the Legislature are also prohibited for two years from lobbying the executive branch. [Art. II, Sec. 8(e), Fla. Const. and Sec. 112.313(9), Fla. Stat.]

2. *Lobbying by Former State Employees*

Certain employees of the executive and legislative branches of state government are prohibited from personally representing another person or entity for compensation before the agency with which they were employed for a period of two years after leaving their positions, unless employed by another agency of state government. [Sec. 112.313(9), Fla. Stat.] These employees include the following:

- a) Executive and legislative branch employees serving in the Senior Management Service and Selected Exempt Service, as well as any person employed by the Department of the Lottery having authority over policy or procurement.
- b) serving in the following position classifications: the Auditor General; the director of the Office of Program Policy Analysis and Government Accountability (OPPAGA); the Sergeant at Arms and Secretary of the Senate; the Sergeant at Arms and Clerk of the House of Representatives; the executive director and deputy executive director of the Commission on Ethics; an executive director, staff director, or deputy staff director of each joint committee, standing committee, or select committee of the Legislature; an executive director, staff director, executive assistant, legislative analyst, or attorney serving in the Office of the President of the Senate, the Office of the Speaker of the House of Representatives, the Senate Majority Party Office, the Senate Minority Party Office, the House Majority Party Office, or the House Minority Party Office; the Chancellor and Vice-Chancellors of the State University System; the general counsel to the Board of Regents; the president, vice presidents, and deans of each state university; any person hired on a contractual basis and having the power normally conferred upon such persons, by whatever title; and any person having the power normally conferred upon the above positions.

This prohibition does not apply to a person who was employed by the Legislature or other agency prior to July 1, 1989; who was a defined employee of the State University System or the Public Service Commission who held such employment on December 31, 1994; or who reached normal retirement age and retired by July 1, 1991. It does apply to OPS employees.

PENALTIES: Persons found in violation of this section are subject to the penalties contained in the Code (see PENALTIES, Part V) as well as a civil penalty in an amount equal to the compensation which the person received for the prohibited conduct. [Sec. 112.313(9)(a)5, Fla. Stat.]

3. *6-Year Lobbying Ban*

For a period of six years after vacation of public position occurring on or after December 31, 2022, a statewide elected officer or member of the legislature shall not lobby for compensation on issues of policy, appropriations, or procurement before the legislature or any state government body or agency. [Art. II Sec 8(f)(3)a., Fla. Const. and Sec. 112.3121, Fla. Stat.]

For a period of six years after vacation of public position occurring on or after December 31, 2022, a person serving as a secretary, an executive director, or other agency head of a department of the executive branch of state government shall not lobby for compensation on issues of policy, appropriations, or procurement before the legislature, the governor, the executive office of the governor, members of the cabinet, a department that is headed by a member of the cabinet, or his or her former department. [Art. II Sec 8(f)(3)b., Fla. Const. and Sec. 112.3121, Fla. Stat.]

For a period of six years after vacation of public position occurring on or after December 31, 2022, a county commissioner, a county officer pursuant to Article VIII or county charter, a school board member, a superintendent of schools, an elected municipal officer, or an elected special district officer in a special district with ad valorem taxing authority shall not lobby for compensation on issues of policy, appropriations, or procurement before his or her former agency or governing body. [Art. II Sec 8(f)(3)c., Fla. Const. and Sec. 112.3121, Fla. Stat.]

4. *Additional Restrictions on Former State Employees*

A former executive or judicial branch employee or PSC employee is prohibited from having employment or a contractual relationship, at any time after retirement or termination of employment, with any business entity (other than a public agency) in connection with a contract in which the employee participated personally and substantially by recommendation or decision while a public employee. [Sec. 112.3185(3), Fla. Stat.]

A former executive or judicial branch employee or PSC employee who has retired or terminated employment is prohibited from having any employment or contractual relationship for two years with any business entity (other than a public agency) in connection with a contract for services which was within his or her responsibility while serving as a state employee. [Sec.112.3185(4), Fla. Stat.]

Unless waived by the agency head, a former executive or judicial branch employee or PSC employee may not be paid more for contractual services provided by him or her to the former agency during the first year after leaving the agency than his or her annual salary before leaving. [Sec. 112.3185(5), Fla. Stat.]

These prohibitions do not apply to PSC employees who were so employed on or before Dec. 31, 1994.

5. *Lobbying by Former Local Government Officers and Employees*

A person elected to county, municipal, school district, or special district office is prohibited from representing another person or entity for compensation before the government body or agency of which he or she was an officer for two years after leaving office. Appointed officers and employees of counties, municipalities, school districts, and special districts may be subject to a similar restriction by local ordinance or resolution. [Sec. 112.313(13) and (14), Fla. Stat.]

E. VOTING CONFLICTS OF INTEREST

State public officers are prohibited from voting in an official capacity on any measure which they know would inure to their own special private gain or loss. A state public officer who abstains, or who votes on a measure which the officer knows would inure to the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate, must make every reasonable effort to file a memorandum of voting conflict with the recording secretary in advance of the vote. If that is not possible, it must be filed within 15 days after the vote occurs. The memorandum must disclose the nature of the officer's interest in the matter.

No county, municipal, or other local public officer shall vote in an official capacity upon any measure which would inure to his or her special private gain or loss, or which the officer knows would inure to the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate. The officer must publicly announce the nature of his or her interest before the vote and must file a memorandum of voting conflict on Commission Form 8B with the meeting's recording officer within 15 days after the vote occurs disclosing the nature of his or her interest in the matter. However, members of community redevelopment agencies and district officers elected on a one-acre, one-vote basis are not required to abstain when voting in that capacity.

No appointed state or local officer shall participate in any matter which would inure to the officer's special private gain or loss, the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate, without first disclosing the nature of his or her interest in the matter. The memorandum of voting conflict (Commission Form 8A or 8B) must be filed with the meeting's recording officer, be provided to the other members of the agency, and be read publicly at the next meeting.

If the conflict is unknown or not disclosed prior to the meeting, the appointed official must orally disclose the conflict at the meeting when the conflict becomes known. Also, a written memorandum of voting conflict must be filed with the meeting's recording officer within 15 days of the disclosure being made and must be provided to the other members of the agency, with the disclosure being read publicly at the next scheduled meeting. [Sec. 112.3143, Fla. Stat.]

F. DISCLOSURES

Conflicts of interest may occur when public officials are in a position to make decisions that affect their personal financial interests. This is why public officers and employees, as well as candidates who run for public office, are required to publicly disclose their financial interests. The disclosure process serves to remind officials of their obligation to put the public interest above personal considerations. It also helps citizens to monitor the considerations of those who spend their tax dollars and participate in public policy decisions or administration.

All public officials and candidates do not file the same degree of disclosure; nor do they all file at the same time or place. Thus, care must be taken to determine which disclosure forms a particular official or candidate is required to file.

The following forms are described below to set forth the requirements of the various disclosures and the steps for correctly providing the information in a timely manner.

1. *FORM 1 - Limited Financial Disclosure*

Who Must File:

Persons required to file FORM 1 include all state officers, local officers, candidates for local elective office, and specified state employees as defined below (other than those officers who are required by law to file FORM 6).

STATE OFFICERS include:

- 1) Elected public officials not serving in a political subdivision of the state and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
- 2) Appointed members of each board, commission, authority, or council having statewide jurisdiction, excluding members of solely advisory bodies; but including judicial nominating commission members; directors of Enterprise Florida, Scripps Florida Funding Corporation, and CareerSource Florida, and members of the Council on the Social Status of Black Men and Boys; the Executive Director, governors, and senior managers of Citizens Property Insurance Corporation; governors and senior managers of Florida Workers' Compensation Joint Underwriting Association, board members of the Northeast Florida Regional Transportation Commission, and members of the board of Triumph Gulf Coast, Inc.; members of the board of Florida is

for Veterans, Inc.; and members of the Technology Advisory Council within the Agency for State Technology.

- 3) The Commissioner of Education, members of the State Board of Education, the Board of Governors, local boards of trustees and presidents of state universities, and members of the Florida Prepaid College Board.

LOCAL OFFICERS include:

- 1) Persons elected to office in any political subdivision (such as municipalities, counties, and special districts) and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
- 2) Appointed members of the following boards, councils, commissions, authorities, or other bodies of any county, municipality, school district, independent special district, or other political subdivision: the governing body of the subdivision; a community college or junior college district board of trustees; a board having the power to enforce local code provisions; a planning or zoning board, board of adjustments or appeals, community redevelopment agency board, or other board having the power to recommend, create, or modify land planning or zoning within the political subdivision, except for citizen advisory committees, technical coordinating committees, and similar groups who only have the power to make recommendations to planning or zoning boards, except for representatives of a military installation acting on behalf of all military installations within that jurisdiction; a pension board or retirement board empowered to invest pension or retirement funds or to determine entitlement to or amount of a pension or other retirement benefit.
- 3) Any other appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.
- 4) Persons holding any of these positions in local government: county or city manager; chief administrative employee or finance director of a county, municipality, or other

political subdivision; county or municipal attorney; chief county or municipal building inspector; county or municipal water resources coordinator; county or municipal pollution control director; county or municipal environmental control director; county or municipal administrator with power to grant or deny a land development permit; chief of police; fire chief; municipal clerk; appointed district school superintendent; community college president; district medical examiner; purchasing agent (regardless of title) having the authority to make any purchase exceeding \$35,000 for the local governmental unit.

- 5) Members of governing boards of charter schools operated by a city or other public entity.
- 6) The officers, directors, and chief executive officer of a corporation, partnership, or other business entity that is serving as the chief administrative or executive officer or employee of a political subdivision, and any business entity employee who is acting as the chief administrative or executive officer or employee of the political subdivision. [Sec. 112.3136, Fla. Stat.]

SPECIFIED STATE EMPLOYEE includes:

- 1) Employees in the Office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.
- 2) The following positions in each state department, commission, board, or council: secretary or state surgeon general, assistant or deputy secretary, executive director, assistant or deputy executive director, and anyone having the power normally conferred upon such persons, regardless of title.
- 3) The following positions in each state department or division: director, assistant or deputy director, bureau chief, assistant bureau chief, and any person having the power normally conferred upon such persons, regardless of title.

- 4) Assistant state attorneys, assistant public defenders, criminal conflict and civil regional counsel, assistant criminal conflict and civil regional counsel, public counsel, full-time state employees serving as counsel or assistant counsel to a state agency, judges of compensation claims, administrative law judges, and hearing officers.
- 5) The superintendent or director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.
- 6) State agency business managers, finance and accounting directors, personnel officers, grant coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$35,000.
- 7) The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions and legislative assistants exempted by the presiding officer of their house); and each employee of the Commission on Ethics.

What Must Be Disclosed:

FORM 1 requirements are set forth fully on the form. In general, this includes the reporting person's sources and types of financial interests, such as the names of employers and addresses of real property holdings. NO DOLLAR VALUES ARE REQUIRED TO BE LISTED. In addition, the form requires the disclosure of certain relationships with, and ownership interests in, specified types of businesses such as banks, savings and loans, insurance companies, and utility companies.

When to File:

CANDIDATES who do not currently hold a position requiring the filing of a Form 1 or Form 6 must register and use the electronic filing system to complete the Form 6, then print and file the disclosure with the officer before whom they qualify at the time of qualifying. [Art. II, Sec. 8(a) and (i), Fla. Const., and Sec. 112.3144, Fla. Stat.]

STATE and LOCAL OFFICERS and SPECIFIED STATE EMPLOYEES are required to file disclosure by July 1 of each year. They also must file within thirty days from the date of appointment or the beginning of employment. Those appointees requiring Senate confirmation must file prior to confirmation.

Where to File:

File with the Commission on Ethics. [Sec. 112.3145, Fla. Stat.]

Beginning January 1, 2024, all Form 1 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable by name or organization on the Commission's website.

2. *FORM 1F - Final Form 1 Limited Financial Disclosure*

FORM 1F is the disclosure form required to be filed within 60 days after a public officer or employee required to file FORM 1 leaves his or her public position. The form covers the disclosure period between January 1 and the last day of office or employment within that year.

3. *FORM 2 - Quarterly Client Disclosure*

The state officers, local officers, and specified state employees listed above, as well as elected constitutional officers, must file a FORM 2 if they or a partner or associate of their professional firm represent a client for compensation before an agency at their level of government.

A FORM 2 disclosure includes the names of clients represented by the reporting person or by any partner or associate of his or her professional firm for a fee or commission before agencies at the reporting person's level of government. Such representations do not include appearances in ministerial matters, appearances before judges of compensation claims, or representations on behalf of one's agency in one's official capacity. Nor does the term include the preparation and filing of forms and applications merely for the purpose of obtaining or transferring a license, so long as the

issuance of the license does not require a variance, special consideration, or a certificate of public convenience and necessity.

When to File:

This disclosure should be filed quarterly, by the end of the calendar quarter following the calendar quarter during which a reportable representation was made. FORM 2 need not be filed merely to indicate that no reportable representations occurred during the preceding quarter; it should be filed ONLY when reportable representations were made during the quarter.

Where To File:

File with the Commission on Ethics. [Sec. 112.3145(4), Fla. Stat.]

Beginning January 1, 2024, all Form 2 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable on the Commission's website.

4. *FORM 6 - Full and Public Disclosure*

Who Must File:

Persons required by law to file FORM 6 include all elected constitutional officers and candidates for such office; the mayor and members of a city council and candidates for these offices; the Duval County Superintendent of Schools; judges of compensation claims (pursuant to Sec. 440.442, Fla. Stat.); members of the Florida Housing Finance Corporation Board and members of expressway authorities, transportation authorities (except the Jacksonville Transportation Authority), bridge authority, or toll authorities created pursuant to Ch. 348 or 343, or 349, or other general law.

What Must be Disclosed:

FORM 6 is a detailed disclosure of assets, liabilities, and sources of income over \$1,000 and their values, as well as net worth. Officials may opt to file their most recent income tax return in lieu of listing sources of income but still must disclose their assets, liabilities, and net worth. In addition, the form requires the disclosure of certain relationships with, and ownership interests in, specified types of businesses such as banks, savings and loans, insurance companies, and utility companies.

When and Where To File:

Officials must file FORM 6 annually by July 1 with the Commission on Ethics.

Beginning January 1, 2023, all Form 6 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable by name and organization on the Commission's website.

CANDIDATES who do not currently hold a position requiring the filing of a Form 1 or Form 6 must register and use the electronic filing system to complete the Form 6, then print and file the disclosure with the officer before whom they qualify at the time of qualifying. [Art. II, Sec. 8(a) and (i), Fla. Const., and Sec. 112.3144, Fla. Stat.]

5. *FORM 6F - Final Form 6 Full and Public Disclosure*

This is the disclosure form required to be filed within 60 days after a public officer or employee required to file FORM 6 leaves his or her public position. The form covers the disclosure period between January 1 and the last day of office or employment within that year.

6. *FORM 9 - Quarterly Gift Disclosure*

Each person required to file FORM 1 or FORM 6, and each state procurement employee, must file a FORM 9, Quarterly Gift Disclosure, with the Commission on Ethics on the last day of any calendar quarter following the calendar quarter in which he or she received a gift worth more than \$100, other

than gifts from relatives, gifts prohibited from being accepted, gifts primarily associated with his or her business or employment, and gifts otherwise required to be disclosed. FORM 9 NEED NOT BE FILED if no such gift was received during the calendar quarter.

Information to be disclosed includes a description of the gift and its value, the name and address of the donor, the date of the gift, and a copy of any receipt for the gift provided by the donor. [Sec. 112.3148, Fla. Stat.]

7. FORM 10 - Annual Disclosure of Gifts from Government Agencies and Direct-Support Organizations and Honorarium Event Related Expenses

State government entities, airport authorities, counties, municipalities, school boards, water management districts, and the South Florida Regional Transportation Authority, may give a gift worth more than \$100 to a person required to file FORM 1 or FORM 6, and to state procurement employees, if a public purpose can be shown for the gift. Also, a direct-support organization for a governmental entity may give such a gift to a person who is an officer or employee of that entity. These gifts are to be reported on FORM 10, to be filed by July 1.

The governmental entity or direct-support organization giving the gift must provide the officer or employee with a statement about the gift no later than March 1 of the following year. The officer or employee then must disclose this information by filing a statement by July 1 with his or her annual financial disclosure that describes the gift and lists the donor, the date of the gift, and the value of the total gifts provided during the calendar year. State procurement employees file their statements with the Commission on Ethics. [Sec. 112.3148, Fla. Stat.]

In addition, a person required to file FORM 1 or FORM 6, or a state procurement employee, who receives expenses or payment of expenses related to an honorarium event from someone who is prohibited from giving him or her an honorarium, must disclose annually the name, address, and affiliation of the donor, the amount of the expenses, the date of the event, a description of the expenses paid or provided, and the total value of the expenses on FORM 10. The donor paying the expenses must provide the officer or employee with a statement about the expenses within 60 days of the honorarium event.

The disclosure must be filed by July 1, for expenses received during the previous calendar year, with the officer's or employee's FORM 1 or FORM 6. State procurement employees file their statements with the Commission on Ethics. [Sec. 112.3149, Fla. Stat.]

However, notwithstanding Sec. 112.3149, Fla. Stat., no executive branch or legislative lobbyist or principal shall make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, any expenditure made for the purpose of lobbying. This may include gifts or honorarium event related expenses that formerly were permitted under Sections 112.3148 and 112.3149. [Sec. 112.3215, Fla. Stat.] Similar prohibitions apply to legislative officials and employees. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.] In addition, gifts, which include anything not primarily related to political activities authorized under ch. 106, are prohibited from political committees. [Sec. 112.31485 Fla. Stat.]

8. FORM 30 - Donor's Quarterly Gift Disclosure

As mentioned above, the following persons and entities generally are prohibited from giving a gift worth more than \$100 to a reporting individual (a person required to file FORM 1 or FORM 6) or to a state procurement employee: a political committee; a lobbyist who lobbies the reporting individual's or procurement employee's agency, and the partner, firm, employer, or principal of such a lobbyist; and vendors. If such person or entity makes a gift worth between \$25 and \$100 to a reporting individual or state procurement employee (that is not accepted in behalf of a governmental entity or charitable organization), the gift should be reported on FORM 30. The donor also must notify the recipient at the time the gift is made that it will be reported.

The FORM 30 should be filed by the last day of the calendar quarter following the calendar quarter in which the gift was made. If the gift was made to an individual in the legislative branch, FORM 30 should be filed with the Lobbyist Registrar. [See page 35 for address.] If the gift was to any other reporting individual or state procurement employee, FORM 30 should be filed with the Commission on Ethics.

However, notwithstanding Section 112.3148, Fla. Stat., no executive branch lobbyist or principal shall make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, any expenditure made for the purpose of lobbying. This may include gifts that formerly were permitted under Section 112.3148. [Sec. 112.3215, Fla. Stat.] Similar prohibitions apply to legislative officials and employees. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.] In addition, gifts from political committees are prohibited. [Sec. 112.31485, Fla. Stat.]

9. *FORM 1X AND FORM 6X - Amendments to Form 1 and Form 6*

These forms are provided for officers or employees to amend their previously filed Form 1 or Form 6.

IV. AVAILABILITY OF FORMS

Beginning January 1, 2024, LOCAL OFFICERS and EMPLOYEES, and OTHER STATE OFFICERS, and SPECIFIED STATE EMPLOYEES who must file FORM 1 annually must file electronically via the Commission's Electronic Financial Disclosure Management System (EFDMS). Paper forms will not be promulgated. Communications regarding the annual filing requirement will be sent via email to filers no later than June 1. Filers must maintain an updated email address in their User Profile in EFDMS.

ELECTED CONSTITUTIONAL OFFICERS and other officials who must file Form 6 annually, including City Commissioners and Mayors, must file electronically via the Commission's Electronic Financial Disclosure Management System (EFDMS). Paper forms will not be promulgated. Communications regarding the annual filing requirement will be sent via email to filers no later than June 1. Filers must maintain an updated email address in their User Profile in EFDMS.

V. PENALTIES

A. Non-criminal Penalties for Violation of the Sunshine Amendment and the Code of Ethics

There are no criminal penalties for violation of the Sunshine Amendment and the Code of Ethics. Penalties for violation of these laws may include: impeachment, removal from office or employment, suspension, public censure, reprimand, demotion, reduction in salary level, forfeiture of no more than one-third salary per month for no more than twelve months, a civil penalty not to exceed \$10,000*, and restitution of any pecuniary benefits received, and triple the value of a gift from a political committee.

B. Penalties for Candidates

CANDIDATES for public office who are found in violation of the Sunshine Amendment or the Code of Ethics may be subject to one or more of the following penalties: disqualification from being on the ballot, public censure, reprimand, or a civil penalty not to exceed \$10,000*, and triple the value of a gift received from a political committee.

C. Penalties for Former Officers and Employees

FORMER PUBLIC OFFICERS or EMPLOYEES who are found in violation of a provision applicable to former officers or employees or whose violation occurred prior to such officer's or employee's leaving public office or employment may be subject to one or more of the following penalties: public censure and reprimand, a civil penalty not to exceed \$10,000*, and restitution of any pecuniary benefits received, and triple the value of a gift received from a political committee.

*Conduct occurring after May 11, 2023, will be subject to a recommended civil penalty of up to \$20,000. [Ch. 2023-49, Laws of Florida.]

D. Penalties for Lobbyists and Others

An executive branch lobbyist who has failed to comply with the Executive Branch Lobbying Registration law (see Part VIII) may be fined up to \$5,000, reprimanded, censured, or prohibited from lobbying executive branch agencies for up to two years. Lobbyists, their employers, principals, partners, and firms, and political committees and committees of continuous existence who give a prohibited gift or honorarium or fail to comply with the gift reporting requirements for gifts worth between \$25 and \$100, may be penalized by a fine of not more than \$5,000 and a prohibition on lobbying, or employing a lobbyist to lobby, before the agency of the public officer or employee to whom the gift was given for up to two years. Any agent or person acting on behalf of a political committee giving a prohibited gift is personally liable for a civil penalty of up to triple the value of the gift.

Executive Branch lobbying firms that fail to timely file their quarterly compensation reports may be fined \$50 per day per report for each day the report is late, up to a maximum fine of \$5,000 per report.

E. Felony Convictions: Forfeiture of Retirement Benefits

Public officers and employees are subject to forfeiture of all rights and benefits under the retirement system to which they belong if convicted of certain offenses. The offenses include embezzlement or theft of public funds; bribery; felonies specified in Chapter 838, Florida Statutes; impeachable offenses; and felonies committed with intent to defraud the public or their public agency. [Sec. 112.3173, Fla. Stat.]

F. Automatic Penalties for Failure to File Annual Disclosure

Public officers and employees required to file either Form 1 or Form 6 annual financial disclosure are subject to automatic fines of \$25 for each day late the form is filed after September 1, up to a maximum penalty of \$1,500. [Sec. 112.3144 and 112.3145, Fla. Stat.]

VI. ADVISORY OPINIONS

Conflicts of interest may be avoided by greater awareness of the ethics laws on the part of public officials and employees through advisory assistance from the Commission on Ethics.

A. Who Can Request an Opinion

Any public officer, candidate for public office, or public employee in Florida who is in doubt about the applicability of the standards of conduct or disclosure laws to himself or herself, or anyone who has the power to hire or terminate another public employee, may seek an advisory opinion from the Commission about himself or herself or that employee.

B. How to Request an Opinion

Opinions may be requested by letter presenting a question based on a real situation and including a detailed description of the situation. Opinions are issued by the Commission and are binding on the conduct of the person who is the subject of the opinion, unless material facts were omitted or misstated in the request for the opinion. Published opinions will not bear the name of the persons involved unless they consent to the use of their names; however, the request and all information pertaining to it is a public record, made available to the Commission and to members of the public in advance of the Commission's consideration of the question.

C. How to Obtain Published Opinions

All of the Commission's opinions are available for viewing or download at its website:
www.ethics.state.fl.us.

VII. COMPLAINTS

A. Citizen Involvement

The Commission on Ethics cannot conduct investigations of alleged violations of the Sunshine Amendment or the Code of Ethics unless a person files a sworn complaint with the Commission alleging such violation has occurred, or a referral is received, as discussed below.

If you have knowledge that a person in government has violated the standards of conduct or disclosure laws described above, you may report these violations to the Commission by filing a sworn complaint on the form prescribed by the Commission and available for download at www.ethics.state.fl.us. The Commission is unable to take action based on learning of such misdeeds through newspaper reports, telephone calls, or letters.

You can download a complaint form (FORM 50) from the Commission's website: www.ethics.state.fl.us, or contact the Commission office at the address or phone number shown on the inside front cover of this booklet.

B. Referrals

The Commission may accept referrals from: the Governor, the Florida Department of Law Enforcement, a State Attorney, or a U.S. Attorney. A vote of six of the Commission's nine members is required to proceed on such a referral.

C. Confidentiality

The complaint or referral, as well as all proceedings and records relating thereto, is confidential until the accused requests that such records be made public or until the matter reaches a stage in the Commission's proceedings where it becomes public. This means that unless the Commission receives a written waiver of confidentiality from the accused, the Commission is not free to release any documents or to comment on a complaint or referral to members of the public or press, so long as the complaint or referral remains in a confidential stage.

A COMPLAINT OR REFERRAL MAY NOT BE FILED WITH RESPECT TO A CANDIDATE ON THE DAY OF THE ELECTION, OR WITHIN THE 30 CALENDAR DAYS PRECEDING THE ELECTION DATE, UNLESS IT IS BASED ON PERSONAL INFORMATION OR INFORMATION OTHER THAN HEARSAY.

D. How the Complaint Process Works

Complaints which allege a matter within the Commission's jurisdiction are assigned a tracking number and Commission staff forwards a copy of the original sworn complaint to the accused within five working days of its receipt. Any subsequent sworn amendments to the complaint also are transmitted within five working days of their receipt.

Once a complaint is filed, it goes through three procedural stages under the Commission's rules. The first stage is a determination of whether the allegations of the complaint are legally sufficient: that is, whether they indicate a possible violation of any law over which the Commission has jurisdiction. If the complaint is found not to be legally sufficient, the Commission will order that the complaint be dismissed without investigation, and all records relating to the complaint will become public at that time.

In cases of very minor financial disclosure violations, the official will be allowed an opportunity to correct or amend his or her disclosure form. Otherwise, if the complaint is found to be legally sufficient, a preliminary investigation will be undertaken by the investigative staff of the Commission. The second stage of the Commission's proceedings involves this preliminary investigation and a decision by the Commission as to whether there is probable cause to believe that there has been a violation of any of the ethics laws. If the Commission finds no probable cause to believe there has been a violation of the ethics laws, the complaint will be dismissed and will become a matter of public record. If the Commission finds probable cause to believe there has been a violation of the ethics laws, the complaint becomes public and usually enters the third stage of proceedings. This stage requires the Commission to decide whether the law was actually violated and, if so, whether a penalty should be recommended. At this stage, the accused has the right to request a public hearing (trial) at which evidence is presented, or the Commission may order that such a hearing be held. Public hearings usually are held in or near the area where the alleged violation occurred.

When the Commission concludes that a violation has been committed, it issues a public report of its findings and may recommend one or more penalties to the appropriate disciplinary body or official.

When the Commission determines that a person has filed a complaint with knowledge that the complaint contains one or more false allegations or with reckless disregard for whether the complaint contains false allegations, the complainant will be liable for costs plus reasonable attorney's fees incurred by the person complained against. The Department of Legal Affairs may bring a civil action to recover such fees and costs, if they are not paid voluntarily within 30 days.

E. Dismissal of Complaints At Any Stage of Disposition

The Commission may, at its discretion, dismiss any complaint at any stage of disposition should it determine that the public interest would not be served by proceeding further, in which case the Commission will issue a public report stating with particularity its reasons for the dismissal. [Sec. 112.324(12), Fla. Stat.]

F. Statute of Limitations

All sworn complaints alleging a violation of the Sunshine Amendment or the Code of Ethics must be filed with the Commission within five years of the alleged violation or other breach of the public trust. Time starts to run on the day AFTER the violation or breach of public trust is committed. The statute of limitations is tolled on the day a sworn complaint is filed with the Commission. If a complaint is filed and the statute of limitations has run, the complaint will be dismissed. [Sec. 112.3231, Fla. Stat.]

VIII. EXECUTIVE BRANCH LOBBYING

Any person who, for compensation and on behalf of another, lobbies an agency of the executive branch of state government with respect to a decision in the area of policy or procurement may be required to register as an executive branch lobbyist. Registration is required before lobbying an agency and is renewable annually. In addition, each lobbying firm must file a compensation report

with the Commission for each calendar quarter during any portion of which one or more of the firm's lobbyists were registered to represent a principal. As noted above, no executive branch lobbyist or principal can make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 can knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.]

Paying an executive branch lobbyist a contingency fee based upon the outcome of any specific executive branch action, and receiving such a fee, is prohibited. A violation of this prohibition is a first degree misdemeanor, and the amount received is subject to forfeiture. This does not prohibit sales people from receiving a commission. [Sec. 112.3217, Fla. Stat.]

Executive branch departments, state universities, community colleges, and water management districts are prohibited from using public funds to retain an executive branch (or legislative branch) lobbyist, although these agencies may use full-time employees as lobbyists. [Sec. 11.062, Fla. Stat.]

Online registration and filing is available at www.floridalobbyist.gov. Additional information about the executive branch lobbyist registration system may be obtained by contacting the Lobbyist Registrar at the following address:

Executive Branch Lobbyist Registration
Room G-68, Claude Pepper Building
111 W. Madison Street
Tallahassee, FL 32399-1425
Phone: 850/922-4990

IX. WHISTLE-BLOWER'S ACT

In 1986, the Legislature enacted a "Whistle-blower's Act" to protect employees of agencies and government contractors from adverse personnel actions in retaliation for disclosing information in a sworn complaint alleging certain types of improper activities. Since then, the Legislature has revised this law to afford greater protection to these employees.

While this language is contained within the Code of Ethics, the Commission has no jurisdiction or authority to proceed against persons who violate this Act. Therefore, a person who has disclosed information alleging improper conduct governed by this law and who may suffer adverse consequences as a result should contact one or more of the following: the Office of the Chief Inspector General in the Executive Office of the Governor; the Department of Legal Affairs; the Florida Commission on Human Relations; or a private attorney. [Sec. 112.3187 - 112.31895, Fla. Stat.]

X. ADDITIONAL INFORMATION

As mentioned above, we suggest that you review the language used in each law for a more detailed understanding of Florida's ethics laws. The "Sunshine Amendment" is Article II, Section 8, of the Florida Constitution. The Code of Ethics for Public Officers and Employees is contained in Part III of Chapter 112, Florida Statutes.

Additional information about the Commission's functions and interpretations of these laws may be found in Chapter 34 of the Florida Administrative Code, where the Commission's rules are published, and in The Florida Administrative Law Reports, which until 2005 published many of the Commission's final orders. The Commission's rules, orders, and opinions also are available at www.ethics.state.fl.us.

If you are a public officer or employee concerned about your obligations under these laws, the staff of the Commission will be happy to respond to oral and written inquiries by providing information about the law, the Commission's interpretations of the law, and the Commission's procedures.

XI. TRAINING

Constitutional officers, elected municipal officers, commissioners of community redevelopment agencies (CRAs), and commissioners of community development districts are required to receive a total of four hours training, per calendar year, in the area of ethics, public

records, and open meetings. The Commission on Ethics does not track compliance or certify providers. Officials indicate their compliance with the training requirement when they file their annual Form 1 or Form 6.

Visit the training page on the Commission's website for up-to-date rules, opinions, audio/video training, and opportunities for live training conducted by Commission staff.

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

3D

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE
MAILING ADDRESS	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF:
CITY COUNTY	☐ CITY ☐ COUNTY ☐ OTHER LOCAL AGENCY
DATE ON WHICH VOTE OCCURRED	NAME OF POLITICAL SUBDIVISION:
MY POSITION IS: ☐ ELECTIVE ☐ APPOINTIVE	

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also **MUST ABSTAIN** from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

* * * * *

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; *and*

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

* * * * *

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, _____, hereby disclose that on _____, 20 ____ :

(a) A measure came or will come before my agency which (check one or more)

- ☐ inured to my special private gain or loss;
- ☐ inured to the special gain or loss of my business associate, _____ ;
- ☐ inured to the special gain or loss of my relative, _____ ;
- ☐ inured to the special gain or loss of _____ , by
whom I am retained; or
- ☐ inured to the special gain or loss of _____ , which
is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

Date Filed

Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

4

NOTICE OF TENDER OF RESIGNATION

To: Board of Supervisors
Parker Pointe Community Development District
Attn: District Manager
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

From: Timothy Smith
Printed Name

Date: 5/31/24
Date

I hereby tender my resignation as a member of the Board of Supervisors of the *Parker Pointe Community Development District*. My tendered resignation will be deemed to be effective as of the time a quorum of the remaining members of the Board of Supervisors accepts it at a duly noticed meeting of the Board of Supervisors.

I certify that this Notice of Tender of Resignation has been executed by me and ☐ personally presented at a duly noticed meeting of the Board of Supervisors, ☒ scanned and electronically transmitted to gillyardd@whhassociates.com or ☐ faxed to 561-571-0013 and agree that the executed original shall be binding and enforceable and the fax or email copy shall be binding and enforceable as an original.


Signature

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

6

RESOLUTION 2024-35

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PARKER
POINTE COMMUNITY DEVELOPMENT DISTRICT ELECTING AND
REMOVING OFFICERS OF THE DISTRICT AND PROVIDING FOR AN
EFFECTIVE DATE.**

WHEREAS, the Parker Pointe Community Development District (the “District”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

WHEREAS, the District’s Board of Supervisors desires to elect and remove Officers of the District.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF
SUPERVISORS OF PARKER POINTE COMMUNITY DEVELOPMENT
DISTRICT THAT:**

SECTION 1. The following is/are elected as Officer(s) of the District effective August 16, 2024:

_____	is elected Chair
_____	is elected Vice Chair
_____	is elected Assistant Secretary
_____	is elected Assistant Secretary
_____	is elected Assistant Secretary
Kristen Thomas	is elected Assistant Secretary

SECTION 2. The following Officer(s) shall be removed as Officer(s) as of August 16, 2024:

Tim Smith	Vice Chair
Greg Meath	Assistant Secretary

SECTION 3. The following prior appointments by the Board remain unaffected by this Resolution:

Craig Wrathell is Secretary

Daniel Rom is Assistant Secretary

Andrew Kantarzi is Assistant Secretary

Craig Wrathell is Treasurer

Jeff Pinder is Assistant Treasurer

PASSED AND ADOPTED THIS 16TH DAY OF AUGUST, 2024.

ATTEST:

**PARKER POINTE COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

7

RESOLUTION 2024-38

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT EXTENDING THE TERMS OF OFFICE OF ALL CURRENT SUPERVISORS TO COINCIDE WITH THE GENERAL ELECTION PURSUANT TO SECTION 190.006, *FLORIDA STATUTES*; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Parker Pointe Community Development District (“District”) is a local unit of special purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

WHEREAS, the current members of the Board of Supervisors (“Board”) were elected by the landowners within the District based on a one acre/one vote basis; and

WHEREAS, Chapter 190, *Florida Statutes*, authorizes the Board to adopt a resolution extending or reducing the terms of office of Board members to coincide with the general election in November; and

WHEREAS, the Board finds that it is in the best interests of the District to adopt this Resolution extending the terms of office of all current Supervisors of the District.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The following terms of office are hereby extended to coincide with the general election to be held in November of 2026:

Seat # 2	(currently held by Jon Seifel)
Seat # 4	(currently held by Justin Frye)
Seat # 5	(currently held by William Fife)

The following terms of office are hereby extended to coincide with the general election to be held in November of 2028:

Seat # 1	(currently held by Michael Caputo)
Seat # 3	(currently held by Debbie Leonard)

SECTION 2. If any provision of this Resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

SECTION 3. This Resolution shall become effective upon its passage and shall remain in effect unless rescinded or repealed.

PASSED AND ADOPTED this 16th day of August, 2024.

ATTEST:

**PARKER POINTE COMMUNITY DEVELOPMENT
DISTRICT**

Secretary/Assistant Secretary

Chair/ Vice Chair, Board of Supervisors

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

8A

MIAMI TODAY

2000 S. Dixie Highway, Suite 105A, Miami, FL 33133 (305) 358-2663

Published Weekly
Miami, Miami-Dade County, Florida
STATE OF FLORIDA
COUNTY OF MIAMI DADE:

Before the undersigned authority personally appeared:
Steve Rosenberg

Who on oath says that he/she is:
Advertising Consultant
of Miami Today, a weekly newspaper published at
Miami in Miami-Dade County, Florida; that the
attached copy of a notice of publication:

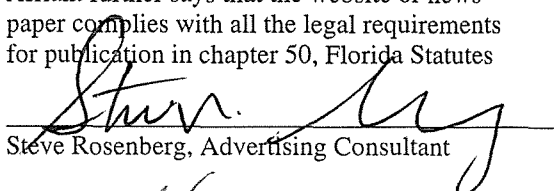
PUBLIC NOTICE NOTICE OF PUBLIC HEARING TO CONSIDER THE ADOPTION OF THE FISCAL YEAR 2025 BUDGET(S)

Was published in said newspaper in the issue(s)
of:

August 1, 2024

Affidavit further says that the said Miami Today is a Newspaper published at Miami, in the said Miami-Dade County, Florida and that the said newspaper has heretofore been continuously published in Miami-Dade County, Florida each week and has been entered as second-class mail matter at the post office in Miami, in the said Miami-Dade County, Florida for a period of one year preceding the first publication of the attached copy of advertisement; and affiant further says that he/she has neither paid nor promised any person, firm or corporation any discount, rebate or commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Affiant further says that the website or newspaper complies with all the legal requirements for publication in chapter 50, Florida Statutes


Steve Rosenberg, Advertising Consultant

Notary 

Sworn to and subscribed before me this

1st day of August 2024

Public Notice

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT

NOTICE OF PUBLIC HEARING TO CONSIDER THE ADOPTION OF THE FISCAL YEAR 2025 BUDGET(S); AND NOTICE OF REGULAR BOARD OF SUPERVISORS' MEETING.

The Board of Supervisors ("Board") of the Parker Pointe Community Development District ("District") will hold a public hearing as follows:

DATE: August 16, 2024
HOUR: 12:00 PM
LOCATION: Office Park at California Club
1031 Ives Dairy Road, Suite 228
Miami, Florida 33179

The purpose of the hearing is to receive comments on the adoption of the proposed budget(s) ("Proposed Budget") of the District for the fiscal year beginning October 1, 2024 and ending September 30, 2025. A regular board meeting of the District will also be held at that time where the Board may consider any other business that may properly come before it. A copy of the agenda and Proposed Budget may be obtained at the offices of the District Manager, **Wrathell, Hunt and Associates, LLC, 2300 Glades Road #410W, Boca Raton, Florida 33431, (877)276-0889 ("District Manager's Office")**, during normal business hours.

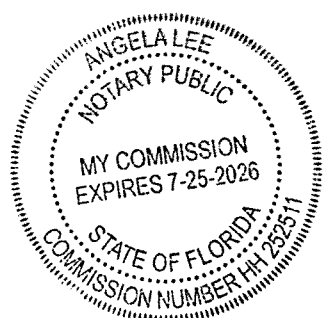
The public hearing and meeting are open to the public and will be conducted in accordance with the provisions of Florida law. The public hearing and meeting may be continued to a date, time, and place to be specified on the record at the meeting. There may be occasions when Board Supervisors or District Staff may participate by speaker telephone.

Any person requiring special accommodations at this meeting because of a disability or physical impairment should contact the District Manager's Office at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Manager's Office.

Each person who decides to appeal any decision made by the Board with respect to any matter considered at the public hearing or meeting is advised that person will need a record of proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

District Manager

Publication date 8/01/24



PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

8B

RESOLUTION 2024-39

[ANNUAL APPROPRIATION RESOLUTION]

THE ANNUAL APPROPRIATION RESOLUTION OF THE PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT (“DISTRICT”) RELATING TO THE ANNUAL APPROPRIATIONS AND ADOPTING THE BUDGET(S) FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2024, AND ENDING SEPTEMBER 30, 2025; AUTHORIZING BUDGET AMENDMENTS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the District Manager has, prior to the fifteenth (15th) day in June, 2024, submitted to the Board of Supervisors (“**Board**”) of the Parker Pointe Community Development District (“**District**”) proposed budget(s) (“**Proposed Budget**”) for the fiscal year beginning October 1, 2024 and ending September 30, 2025 (“**Fiscal Year 2025**”) along with an explanatory and complete financial plan for each fund of the District, pursuant to the provisions of Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, at least sixty (60) days prior to the adoption of the Proposed Budget, the District filed a copy of the Proposed Budget with the local governing authorities having jurisdiction over the area included in the District pursuant to the provisions of Section 190.008(2)(b), *Florida Statutes*; and

WHEREAS, the Board set a public hearing thereon and caused notice of such public hearing to be given by publication pursuant to Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, the District Manager posted the Proposed Budget on the District’s website at least two days before the public hearing; and

WHEREAS, Section 190.008(2)(a), *Florida Statutes*, requires that, prior to October 1st of each year, the Board, by passage of the Annual Appropriation Resolution, shall adopt a budget for the ensuing fiscal year and appropriate such sums of money as the Board deems necessary to defray all expenditures of the District during the ensuing fiscal year; and

WHEREAS, the District Manager has prepared a Proposed Budget, whereby the budget shall project the cash receipts and disbursements anticipated during a given time period, including reserves for contingencies for emergency or other unanticipated expenditures during the fiscal year.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. BUDGET

The Proposed Budget, attached hereto as **Exhibit A**, as amended by the Board, is hereby adopted in accordance with the provisions of Section 190.008(2)(a), *Florida Statutes* ("**Adopted Budget**"), and incorporated herein by reference; provided, however, that the comparative figures contained in the Adopted Budget may be subsequently revised as deemed necessary by the District Manager to reflect actual revenues and expenditures. The Adopted Budget shall be posted by the District Manager on the District's official website within thirty (30) days after adoption, and shall remain on the website for at least 2 years.

SECTION 2. APPROPRIATIONS

There is hereby appropriated out of the revenues of the District, for Fiscal Year 2025, the sum(s) set forth in **Exhibit A** to be raised by the levy of assessments and/or otherwise, which sum is deemed by the Board to be necessary to defray all expenditures of the District during said budget year, to be divided and appropriated as set forth in **Exhibit A**.

SECTION 3. BUDGET AMENDMENTS

Pursuant to Section 189.016, *Florida Statutes*, the District at any time within Fiscal Year 2025 or within 60 days following the end of the Fiscal Year 2025 may amend its Adopted Budget for that fiscal year as follows:

- a. A line-item appropriation for expenditures within a fund may be decreased or increased by motion of the Board recorded in the minutes, and approving the expenditure, if the total appropriations of the fund do not increase.
- b. The District Manager or Treasurer may approve an expenditure that would increase or decrease a line-item appropriation for expenditures within a fund if the total appropriations of the fund do not increase and if either (i) the aggregate change in the original appropriation item does not exceed the greater of \$15,000 or 15% of the original appropriation, or (ii) such expenditure is authorized by separate disbursement or spending resolution.
- c. Any other budget amendments shall be adopted by resolution and consistent with Florida law.

SECTION 4. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.

[signatures appear on the following page]

PASSED AND ADOPTED THIS 16TH DAY OF AUGUST, 2024.

ATTEST:

**PARKER POINTE COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

By:_____

Its:_____

Exhibit A: Fiscal Year 2025 Budget

Exhibit A: Fiscal Year 2025 Budget

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
PROPOSED BUDGET
FISCAL YEAR 2025**

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
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**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND BUDGET
FISCAL YEAR 2025**

	Fiscal Year 2024				
	Adopted Budget FY 2024	Actual through 3/31/2024	Projected through 9/30/2024	Total Actual & Projected	Proposed Budget FY 2025
REVENUES					
Landowner contribution	\$ 297,598	\$ -	\$ 303,553	\$ 303,553	\$ 322,340
Total revenues	297,598	-	303,553	303,553	322,340
EXPENDITURES					
Professional & administrative					
Management/accounting/recording	44,000	18,333	25,667	44,000	48,000
Legal	25,000	2,022	22,978	25,000	25,000
Engineering	2,000	-	2,000	2,000	2,000
Audit*	-	-	3,500	3,500	4,300
Arbitrage rebate calculation*	-	-	-	-	1,000
Dissemination agent*	583	-	333	333	1,000
Trustee*	-	-	-	-	5,500
Emma software service*	-	-	-	-	2,500
Telephone	200	83	117	200	200
Postage	500	11	489	500	500
Printing & binding	500	208	292	500	500
Legal advertising	6,500	4,633	3,000	7,633	6,500
Annual special district fee	175	-	175	175	175
Insurance	5,500	-	5,500	5,500	5,500
Contingencies/bank charges	750	-	750	750	750
Website hosting & maintenance	1,680	-	1,680	1,680	705
Website ADA compliance	210	210	-	210	210
Total professional & administrative	87,598	25,500	66,481	91,981	104,340
Field operations					
Landscape maintenance	150,000	-	150,000	150,000	58,000
Streetlighting	60,000	-	60,000	60,000	60,000
Misc.amenity	-	-	-	-	100,000
Total field operations	210,000	-	210,000	210,000	218,000
Total expenditures	297,598	25,500	276,481	301,981	322,340
Excess/(deficiency) of revenues over/(under) expenditures	-	(25,500)	27,072	1,572	-
Fund balance - beginning (unaudited)	-	(1,572)	(27,072)	(1,572)	-
Fund balance - ending (projected)	-	(27,072)	-	-	-
Unassigned	-	(27,072)	-	-	-
Fund balance - ending	\$ -	\$ (27,072)	\$ -	\$ -	\$ -

*These items will be realized when bonds are issued.

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
DEFINITIONS OF GENERAL FUND EXPENDITURES**

EXPENDITURES

Professional & administrative

Management/accounting/recording 48,000

Wrathell, Hunt and Associates, LLC (WHA), specializes in managing community development districts by combining the knowledge, skills and experience of a team of professionals to ensure compliance with all of the District's governmental requirements. WHA develops financing programs, administers the issuance of tax exempt bond financings, operates and maintains the assets of the community.

Legal 25,000

General counsel and legal representation, which includes issues relating to public finance, public bidding, rulemaking, open meetings, public records, real property dedications, conveyances and contracts.

Engineering 2,000

The District's Engineer will provide construction and consulting services, to assist the District in crafting sustainable solutions to address the long term interests of the community while recognizing the needs of government, the environment and maintenance of the District's facilities.

Audit 4,300

Statutorily required for the District to undertake an independent examination of its books, records and accounting procedures.

Arbitrage rebate calculation* 1,000

To ensure the District's compliance with all tax regulations, annual computations are necessary to calculate the arbitrage rebate liability.

Dissemination agent* 1,000

The District must annually disseminate financial information in order to comply with the requirements of Rule 15c2-12 under the Securities Exchange Act of 1934. Wrathell, Hunt & Associates serves as dissemination agent.

Trustee* 5,500

Emma software service* 2,500

DTS Agreement for quarterly disclosure requirements

Telephone 200

Postage 500

Telephone and fax machine.

Printing & binding 500

Mailing of agenda packages, overnight deliveries, correspondence, etc.

Legal advertising 6,500

Letterhead, envelopes, copies, agenda packages

Annual special district fee 175

The District advertises for monthly meetings, special meetings, public hearings, public bids, etc.

Insurance 5,500

Annual fee paid to the Florida Department of Economic Opportunity.

Contingencies/bank charges 750

Bank charges and other miscellaneous expenses incurred during the year and automated AP routing etc.

Website hosting & maintenance 705

Website ADA compliance 210

Field operations

Misc.amenity 100,000

Landscape maintenance 58,000

Streetlighting 60,000

As per FLP agreement plus excess budget for maintenance costs

Total expenditures \$ 322,340

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
DEBT SERVICE FUND BUDGET - SERIES 2024
FISCAL YEAR 2025**

	Fiscal Year 2024				
	Proposed Budget FY 2024	Actual through 3/31/2024	Projected through 9/30/2024	Total Actual & Projected Revenue & Expenditures	Proposed Budget FY 2025
REVENUES					
Assessment levy: off-roll	\$ -	\$ -	\$ 160,079	\$ 160,079	\$ 603,803
Total revenues	-	-	160,079	160,079	603,803
EXPENDITURES					
Debt service					
Principal	-	-	-	-	120,000
Interest	-	-	-	-	402,215
Underwriter's discount	-	-	173,900	173,900	
Cost of issuance	-	-	189,400	189,400	-
Total expenditures	-	-	363,300	363,300	522,215
Excess/(deficiency) of revenues over/(under) expenditures	-	-	(203,221)	(203,221)	81,588
OTHER FINANCING SOURCES/(USES)					
Bond proceeds	-	-	685,057	685,057	-
Original issue discount	-	-	(19,856)	(19,856)	-
Total other financing sources/(uses)	-	-	665,201	665,201	-
Net increase/(decrease) in fund balance	-	-	461,980	461,980	81,588
Fund balance:					
Beginning fund balance (unaudited)	-	-	-	-	461,980
Ending fund balance (projected)	\$ -	\$ -	\$ 461,980	\$ 461,980	543,568
Use of fund balance:					
Debt service reserve account balance (required)					(301,902)
Interest expense - November 1, 2025					(239,166)
Projected fund balance surplus/(deficit) as of September 30, 2025					\$ 2,500

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
SERIES 2024 AMORTIZATION SCHEDULE**

	Principal	Coupon Rate	Interest	Debt Service	Bond Balance
11/01/24			160,078.97	160,078.97	8,695,000.00
05/01/25	120,000.00	4.950%	242,136.25	362,136.25	8,575,000.00
11/01/25			239,166.25	239,166.25	8,575,000.00
05/01/26	125,000.00	4.950%	239,166.25	364,166.25	8,450,000.00
11/01/26			236,072.50	236,072.50	8,450,000.00
05/01/27	135,000.00	4.950%	236,072.50	371,072.50	8,315,000.00
11/01/27			232,731.25	232,731.25	8,315,000.00
05/01/28	140,000.00	4.950%	232,731.25	372,731.25	8,175,000.00
11/01/28			229,266.25	229,266.25	8,175,000.00
05/01/29	145,000.00	4.950%	229,266.25	374,266.25	8,030,000.00
11/01/29			225,677.50	225,677.50	8,030,000.00
05/01/30	155,000.00	4.950%	225,677.50	380,677.50	7,875,000.00
11/01/30			221,841.25	221,841.25	7,875,000.00
05/01/31	160,000.00	4.950%	221,841.25	381,841.25	7,715,000.00
11/01/31			217,881.25	217,881.25	7,715,000.00
05/01/32	170,000.00	5.500%	217,881.25	387,881.25	7,545,000.00
11/01/32			213,206.25	213,206.25	7,545,000.00
05/01/33	180,000.00	5.500%	213,206.25	393,206.25	7,365,000.00
11/01/33			208,256.25	208,256.25	7,365,000.00
05/01/34	190,000.00	5.500%	208,256.25	398,256.25	7,175,000.00
11/01/34			203,031.25	203,031.25	7,175,000.00
05/01/35	200,000.00	5.500%	203,031.25	403,031.25	6,975,000.00
11/01/35			197,531.25	197,531.25	6,975,000.00
05/01/36	210,000.00	5.500%	197,531.25	407,531.25	6,765,000.00
11/01/36			191,756.25	191,756.25	6,765,000.00
05/01/37	225,000.00	5.500%	191,756.25	416,756.25	6,540,000.00
11/01/37			185,568.75	185,568.75	6,540,000.00
05/01/38	235,000.00	5.500%	185,568.75	420,568.75	6,305,000.00
11/01/38			179,106.25	179,106.25	6,305,000.00
05/01/39	250,000.00	5.500%	179,106.25	429,106.25	6,055,000.00
11/01/39			172,231.25	172,231.25	6,055,000.00
05/01/40	265,000.00	5.500%	172,231.25	437,231.25	5,790,000.00
11/01/40			164,943.75	164,943.75	5,790,000.00
05/01/41	280,000.00	5.500%	164,943.75	444,943.75	5,510,000.00
11/01/41			157,243.75	157,243.75	5,510,000.00
05/01/42	295,000.00	5.500%	157,243.75	452,243.75	5,215,000.00
11/01/42			149,131.25	149,131.25	5,215,000.00
05/01/43	310,000.00	5.500%	149,131.25	459,131.25	4,905,000.00
11/01/43			140,606.25	140,606.25	4,905,000.00
05/01/44	330,000.00	5.500%	140,606.25	470,606.25	4,575,000.00
11/01/44			131,531.25	131,531.25	4,575,000.00
05/01/45	350,000.00	5.750%	131,531.25	481,531.25	4,225,000.00
11/01/45			121,468.75	121,468.75	4,225,000.00
05/01/46	370,000.00	5.750%	121,468.75	491,468.75	3,855,000.00
11/01/46			110,831.25	110,831.25	3,855,000.00
05/01/47	390,000.00	5.750%	110,831.25	500,831.25	3,465,000.00
11/01/47			99,618.75	99,618.75	3,465,000.00
05/01/48	415,000.00	5.750%	99,618.75	514,618.75	3,050,000.00

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
SERIES 2024 AMORTIZATION SCHEDULE**

	Principal	Coupon Rate	Interest	Debt Service	Bond Balance
11/01/48			87,687.50	87,687.50	3,050,000.00
05/01/49	440,000.00	5.750%	87,687.50	527,687.50	2,610,000.00
11/01/49			75,037.50	75,037.50	2,610,000.00
05/01/50	465,000.00	5.750%	75,037.50	540,037.50	2,145,000.00
11/01/50			61,668.75	61,668.75	2,145,000.00
05/01/51	490,000.00	5.750%	61,668.75	551,668.75	1,655,000.00
11/01/51			47,581.25	47,581.25	1,655,000.00
05/01/52	520,000.00	5.750%	47,581.25	567,581.25	1,135,000.00
11/01/52			32,631.25	32,631.25	1,135,000.00
05/01/53	550,000.00	5.750%	32,631.25	582,631.25	585,000.00
11/01/53			16,818.75	16,818.75	585,000.00
05/01/54	585,000.00	5.750%	16,818.75	601,818.75	-
Total	8,695,000.00		9,502,462.72	18,197,462.72	

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
ASSESSMENT COMPARISON
PROJECTED FISCAL YEAR 2025 ASSESSMENTS**

Landowner Contribution (GF) and Off-Roll Assessments (DSF)					
Product/Parcel	Units	FY 2025 O&M Contribution per Unit	FY 2025 DS Assessment per Unit	FY 2025 Total Assessment per Unit	FY 2024 Total Assessment per Unit
TH	274	\$ 868.84	\$ 1,549.11	\$ 2,417.95	n/a
SF	97	868.84	1,848.94	2,717.78	n/a
Total	371				

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

9A

MIAMI TODAY

2000 S. Dixie Highway, Suite 105A, Miami, FL 33133 (305) 358-2663

Published Weekly
Miami, Miami-Dade County, Florida
STATE OF FLORIDA
COUNTY OF MIAMI DADE:

Before the undersigned authority personally appeared:
Steve Rosenberg

Who on oath says that he/she is:

Advertising Sales Consultant
of Miami Today, a weekly newspaper published at
Miami in Miami-Dade County, Florida; that the
attached copy of a notice of publication:

PUBLIC NOTICE

**Parker Pointe Community Development District
Notice of Public Hearing to Consider The Adoption
of the Fiscal Year 2025 Budget.**

Was published in said newspaper in the issue(s) of:

7/25/24

Affidavit further says that the said Miami Today is a
Newspaper published at Miami, in the said Miami-
Dade County, Florida and that the said newspaper
has heretofore been continuously published in Miami-
Dade County, Florida each week and has been entered
as second-class mail matter at the post office in
Miami, in the said Miami-Dade County, Florida for
a period of one year preceding the first publication of
the attached copy of advertisement; and affiant further
says that he/she has neither paid nor promised any
person, firm or corporation any discount, rebate or
commission or refund for the purpose of securing
this advertisement for publication in the said
newspaper.

Affiant further says that the website or newspaper
complies with all the legal requirements for publication
in chapter 50, Florida Statutes.

Steve Rosenberg
Steve Rosenberg, Advertising Sales Consultant

Notary

Angela Lee

Sworn to and subscribed before me this

25th day of July 2024

Public Notice

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT

NOTICE OF PUBLIC HEARING TO CONSIDER THE ADOPTION OF THE FISCAL YEAR 2025 BUDGET; NOTICE OF PUBLIC HEARING TO CONSIDER THE IMPOSITION OF OPERATIONS AND MAINTENANCE SPECIAL ASSESSMENTS, ADOPTION OF AN ASSESSMENT ROLL, AND THE LEVY, COLLECTION, AND ENFORCEMENT OF THE SAME; AND NOTICE OF REGULAR BOARD OF SUPERVISORS' MEETING.

The Board of Supervisors ("Board") for the Parker Pointe Community Development District ("District") will hold the following public hearings and a regular meeting:

DATE: August 16, 2024
HOUR: 12:00 PM
LOCATION: Office Park at California Club
1031 Ives Dairy Road, Suite 228
Miami, Florida 33179

The first public hearing is being held pursuant to Chapter 190, Florida Statutes, to receive public comment and objections on the District's proposed budget ("Proposed Budget") for the fiscal year beginning October 1, 2024 and ending September 30, 2025 ("Fiscal Year 2025"). The second public hearing is being held pursuant to Chapters 190 and 197, Florida Statutes, to consider the imposition of operations and maintenance special assessments ("O&M Assessments") upon the lands located within the District, to fund the Proposed Budget for Fiscal Year 2025; to consider the adoption of an assessment roll; and, to provide for the levy, collection, and enforcement of assessments. At the conclusion of the hearings, the Board will, by resolution, adopt a budget and levy O&M Assessments as finally approved by the Board. A Board meeting of the District will also be held where the Board may consider any other District business.

Description of Assessments

The District imposes O&M Assessments on benefited property within the District for the purpose of funding the District's general administrative, operations, and maintenance budget. Pursuant to Section 170.07, Florida Statutes, a description of the services to be funded by the O&M Assessments, and the properties to be improved and benefited from the O&M Assessments, are set forth in the Proposed Budget. A geographic depiction of the property potentially subject to the proposed O&M Assessments is identified in the map attached hereto. The O&M Assessments are allocated on a per unit basis. The O&M Assessments will only be imposed on lots sold to third parties, including lots sold during the Fiscal Year 2025, and any portion of the District's Proposed Budget not funded by the O&M Assessments will be funded by a developer funding agreement. The table below shows the schedule of the proposed O&M Assessments, which are subject to change at the hearing:

Product Type	Number of Units/Acres	ERU	O&M Assessment per unit*
Residential Units	0	1.00	\$962.27
Undeveloped Land	43.14	8.60	\$8,275.35
TOTAL REVENUE:			\$356,998.46

*Amount includes estimated 3% County collection costs and 4% early payment discounts

The proposed O&M Assessments as stated include collection costs and/or early payment discounts, which may be imposed on assessments that are collected on the County tax bill. Moreover, pursuant to Section 197.353(4), Florida Statutes, the lien amount shall serve as the "maximum rate" authorized by law for O&M Assessments, such that no assessment hearing shall be held or notice provided in future years unless the assessments are proposed to be increased or another criterion within Section 197.353(4), Florida Statutes, is met. Note that the O&M Assessments do not include any debt service assessments previously levied by the District and due to be collected for Fiscal Year 2025.

The District intends to have the County tax collector collect the assessments imposed on certain developed property, and will directly collect the assessments imposed on the remaining benefited property by sending out a bill prior to, or during, November of this year. It is important to pay your assessment because failure to pay will cause a tax certificate to be issued against the property which may result in loss of title, or for direct billed assessments, may result in a foreclosure action, which also may result in a loss of title. The District's decision to collect assessments on the tax roll or by direct billing does not preclude the District from later using a different collection method.

Additional Provisions

The public hearings and meeting are open to the public and will be conducted in accordance with the provisions of Florida law. A copy of the Proposed Budget, proposed assessment roll, and the agenda for the hearings and meeting may be obtained at the offices of the District Manager, located at Wrathell, Hunt and Associates, LLC, 2300 Glades Road #410W, Boca Raton, Florida 33431, (877)276-0889 ("District Manager's Office"), during normal business hours. The public hearings and meeting may be continued to a date, time, and place to be specified on the record at the hearings or meeting.

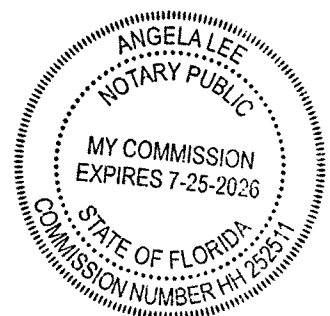
Any person requiring special accommodations at this meeting because of a disability or physical impairment should contact the District Manager's Office at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Manager's Office.

Please note that all affected property owners have the right to appear at the public hearings and meeting, and may also file written objections with the District Manager's Office within twenty days of publication of this notice. Each person who decides to appeal any decision made by the Board with respect to any matter considered at the public hearings or meeting is advised that person will need a record of proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

District Manager

Angela Lee

Publication date: 7/25/24



PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

9B

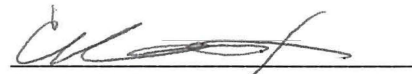
STATE OF FLORIDA)
COUNTY OF PALM BEACH)

AFFIDAVIT OF MAILING

BEFORE ME, the undersigned authority, this day personally appeared Curtis Marcoux, who by me first being duly sworn and deposed says:

1. I am over eighteen (18) years of age and am competent to testify as to the matters contained herein. I have personal knowledge of the matters stated herein.
2. I, Curtis Marcoux, am employed by Wrathell, Hunt and Associates, LLC, and, in the course of that employment, serve as and/or assist the Financial Analyst for the Parker Pointe Community Development District ("**District**"). Among other things, my duties include preparing and transmitting correspondence relating to the District.
3. I do hereby certify that on July 15, 2024, and in the regular course of business, I caused letters, in the forms attached hereto as **Exhibit A**, to be sent notifying affected landowner(s) in the District of their rights under Florida law, and with respect to the District's anticipated imposition of operations and maintenance assessments. I further certify that the letters were sent to the addressees identified in the letters or list, if any, included in **Exhibit A** and in the manner identified in **Exhibit A**.
4. I do hereby certify that the attached document(s) were made at or near the time of the occurrence of the matters set forth by, or from information transmitted by, a person having knowledge of those matters; were and are being kept in the course of the regularly conducted activity of the District; and were made as a regular practice in the course of the regularly conducted activity of the District.

FURTHER AFFIANT SAYETH NOT.


By: Curtis Marcoux

SWORN AND SUBSCRIBED before me by means of ☒ physical presence or ☐ online notarization this 15 day of July 2024, by Curtis Marcoux, for Wrathell, Hunt and Associates, LLC, who ☒ is personally known to me or ☐ has provided _____ as identification, and who ☐ did or ☒ did not take an oath.



DAPHNE GILLYARD
Notary Public
State of Florida
Comm# HH390392
Expires 8/20/2027

NOTARY PUBLIC


Print Name: Daphne Gillyard
Notary Public, State of Florida
Commission No.: HH 390392
My Commission Expires: 8/20/2027

EXHIBIT A: Copies of Forms of Mailed Notices, including Addresses

Parker Pointe Community Development District
OFFICE OF THE DISTRICT MANAGER
2300 Glades Road, Suite 410W•Boca Raton, Florida 33431
Phone: (561) 571-0010•Toll-free: (877) 276-0889•Fax: (561) 571-0013
THIS IS NOT A BILL – DO NOT PAY

July 15, 2024

VIA FIRST CLASS MAIL

SK PARKER POINTE LLC

105 NE 1st

DELRAY BEACH, FL 33444

PARCEL ID: 10-7917-001-0260, 10-7917-001-0270, 10-7917-001-0280, 10-7917-001-0290

RE: Parker Pointe Community Development District
Fiscal Year 2025 Budget and O&M Assessments

Dear Property Owner:

Pursuant to Florida law, the Parker Pointe Community Development District (“**District**”) will be holding a meeting and public hearing(s) for the purposes of (i) adopting the District’s proposed budget (“**Proposed Budget**”) for the fiscal year beginning October 1, 2024 and ending September 30, 2025 (“**Fiscal Year 2025**”), and (ii) levying operations and maintenance assessments (“**O&M Assessments**”) to fund the Proposed Budget as follows:

DATE: **August 16, 2024**
HOUR: **12:00 PM**
LOCATION: **Office Park at California Club**
1031 Ives Dairy Road, Suite 228
Miami, Florida 33179

The proposed O&M Assessment information for your property is set forth in **Exhibit A**. The public hearings and meeting are open to the public and will be conducted in accordance with Florida law. A copy of the Proposed Budget and assessment roll, and the agenda, for the hearings and meeting may be obtained by contacting **Wrathell, Hunt and Associates, LLC, 2300 Glades Road #410W, Boca Raton, Florida 33431, (877)276-0889 (“District Manager’s Office”)**. The public hearings and meeting may be continued to a date, time, and place to be specified on the record. Any person requiring special accommodations because of a disability or physical impairment should contact the District Manager’s Office at least forty-eight (48) hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District.

All affected property owners have the right to appear and comment at the public hearings and meeting, and may file written objections with the District Manager’s Office within twenty (20) days of issuance of this notice. Each person who decides to appeal any decision made by the Board with respect to any matter considered at the public hearings or meeting is advised that person will need a record of proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

Sincerely,



Cindy Cerbone
District Manager

EXHIBIT A
Summary of O&M Assessments

The schedule of assessments, and total revenue to be collected to fund the Proposed Budget for Fiscal Year 2025, are as set forth below. The O&M Assessments are allocated on a per unit basis.

Product Type	Number of Units/Acres	ERU	O&M Assessment per unit
Residential Units	0	1.00	\$962.27
Undeveloped Land	43.14	8.60	\$8,275.35
TOTAL REVENUE:			\$356,998.46

*Amount includes estimated 3% County collection costs and 4% early payment discounts

Note that the O&M Assessments do not include any debt service assessments previously levied by the District and due to be collected for Fiscal Year 2025. Moreover, pursuant to Section 197.3632(4), *Florida Statutes*, the lien amount shall serve as the “maximum rate” authorized by law for operation and maintenance assessments, such that no assessment hearing shall be held or notice provided in future years unless the assessments are proposed to be increased or another criterion within Section 197.3632(4) is met.

By operation of law, the District’s assessments each year constitute a lien against benefitted property located within the District just as do each year’s property taxes. For Fiscal Year 2025, the District intends to have the County Tax Collector collect the assessments imposed on certain developed property, and will directly collect the assessments imposed on the remaining benefitted property by sending out a bill prior to, or during, November of this year. The District may also directly collect assessments at the time lots are sold. For delinquent assessments that were initially directly billed by the District, the District may initiate a foreclosure action or may place the delinquent assessments on the next year’s county tax bill. **IT IS IMPORTANT TO PAY YOUR ASSESSMENT BECAUSE FAILURE TO PAY WILL CAUSE A TAX CERTIFICATE TO BE ISSUED AGAINST THE PROPERTY WHICH MAY RESULT IN LOSS OF TITLE, OR FOR DIRECT BILLED ASSESSMENTS, MAY RESULT IN A FORECLOSURE ACTION, WHICH ALSO MAY RESULT IN A LOSS OF TITLE.** The District’s decision to collect assessments on the tax roll or by direct billing does not preclude the District from later electing to collect those or other assessments in a different manner at a future time.

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

9C

RESOLUTION 2024-40
[ANNUAL ASSESSMENT RESOLUTION]

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT PROVIDING FOR FUNDING FOR THE FISCAL YEAR 2025 ADOPTED BUDGET(S); PROVIDING FOR THE COLLECTION AND ENFORCEMENT OF SPECIAL ASSESSMENTS, INCLUDING BUT NOT LIMITED TO PENALTIES AND INTEREST THEREON; CERTIFYING AN ASSESSMENT ROLL; PROVIDING FOR AMENDMENTS TO THE ASSESSMENT ROLL; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Parker Pointe Community Development District ("**District**") is a local unit of special-purpose government established pursuant to Chapter 190, *Florida Statutes*, for the purpose of providing, operating and maintaining infrastructure improvements, facilities and services to the lands within the District; and

WHEREAS, the District has constructed or acquired various infrastructure improvements and provides certain services in accordance with the District's adopted capital improvement plan and Chapter 190, *Florida Statutes*; and

WHEREAS, the Board of Supervisors ("**Board**") of the District has determined to undertake various operations and maintenance and other activities described in the District's budget ("**Adopted Budget**") for the fiscal year beginning October 1, 2024 and ending September 30, 2025 ("**FY 2025**"), attached hereto as **Exhibit A**; and

WHEREAS, in order to fund the District's Adopted Budget, the District's Board now desires to adopt this Resolution setting forth the means by which the District intends to fund its Adopted Budget.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT:

1. FUNDING. As indicated in **Exhibits A and B**, the District's Board hereby authorizes the following funding mechanisms for the Adopted Budget:

a. OPERATIONS AND MAINTENANCE FUNDING AGREEMENT. [RESERVED.]

b. OPERATIONS AND MAINTENANCE ASSESSMENTS.

i. Benefit Findings. The provision of the services, facilities, and operations as described in **Exhibit A** confers a special and peculiar benefit to the lands within the District, which benefit exceeds or equals the cost of the assessments. The allocation of the

assessments to the specially benefitted lands is shown in **Exhibits A and B**, and is hereby found to be fair and reasonable.

- ii. **Assessment Imposition.** Pursuant to Chapters 190, 197 and/or 170, *Florida Statutes*, and using the procedures authorized by Florida law for the levy and collection of special assessments, a special assessment for operation and maintenance is hereby imposed and levied on benefitted lands within the District and in accordance with **Exhibits A and B**. The lien of the special assessments for operations and maintenance imposed and levied by this Resolution shall be effective upon passage of this Resolution.
- iii. **Maximum Rate.** Pursuant to Section 197.3632(4), *Florida Statutes*, the lien amount shall serve as the “maximum rate” authorized by law for operation and maintenance assessments.

- c. **DEBT SERVICE SPECIAL ASSESSMENTS.** The District’s Board hereby directs District Staff to effect the collection of the previously levied debt service special assessments, as set forth in **Exhibits A and B**.

2. **COLLECTION AND ENFORCEMENT; PENALTIES; INTEREST.**

- a. **Tax Roll Assessments.** [RESERVED.]
- b. **Direct Bill Assessments.** If and to the extent indicated in **Exhibits A and B**, certain operations and maintenance special assessments (if any) and/or previously levied debt service special assessments (if any) imposed on “**Direct Collect Property**” identified in **Exhibit B** shall be collected directly by the District in accordance with Florida law, as set forth in **Exhibits A and B**. The District’s Board finds and determines that such collection method is an efficient method of collection for the Direct Collect Property.
 - i. Operations and maintenance assessments directly collected by the District shall be due and payable on the dates set forth in the invoices prepared by the District Manager, but no earlier than October 1, 2024 and no later than September 30, 2025.

As noted above, operations and maintenance assessments shall attach to any lots sold during Fiscal Year 2025 at the time of sale, and as evidenced by an estoppel letter prepared by the District’s Manager. Any such assessments shall be collected directly by the District in accordance with Florida law, and at the time of sale.

- ii. Debt service assessments directly collected by the District are due in full on December 1, 2024; provided, however, that, to the extent permitted by law, the assessments due may be paid in two partial,

deferred payments and on dates that are 30 days prior to the District's corresponding debt service payment dates all as set forth in the invoice(s) prepared by the District Manager.

- iii. In the event that an assessment payment is not made in accordance with the schedule(s) stated above, the whole assessment – including any remaining partial, deferred payments for the Fiscal Year, shall immediately become due and payable; shall accrue interest, penalties in the amount of one percent (1%) per month, and all costs of collection and enforcement; and shall either be enforced pursuant to a foreclosure action, or, at the District's sole discretion, collected pursuant to the Uniform Method on a future tax bill, which amount may include penalties, interest, and costs of collection and enforcement. Any prejudgment interest on delinquent assessments shall accrue at the rate of any bonds secured by the assessments, or at the statutory prejudgment interest rate, as applicable. In the event an assessment subject to direct collection by the District shall be delinquent, the District Manager and District Counsel, without further authorization by the Board, may initiate foreclosure proceedings pursuant to Chapter 170, *Florida Statutes*, or other applicable law to collect and enforce the whole assessment, as set forth herein.

- c. **Future Collection Methods.** The decision to collect special assessments by any particular method – e.g., on the tax roll or by direct bill – does not mean that such method will be used to collect special assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.

3. **ASSESSMENT ROLL; AMENDMENTS.** The Assessment Roll, attached to this Resolution as **Exhibit "B,"** is hereby certified for collection. The District Manager shall keep apprised of all updates made to the County property roll by the Property Appraiser after the date of this Resolution, and shall amend the Assessment Roll in accordance with any such updates, for such time as authorized by Florida law, to the County property roll.

4. **SEVERABILITY.** The invalidity or unenforceability of any one or more provisions of this Resolution shall not affect the validity or enforceability of the remaining portions of this Resolution, or any part thereof.

5. **EFFECTIVE DATE.** This Resolution shall take effect upon the passage and adoption of this Resolution by the Board.

PASSED AND ADOPTED this 16th day of August, 2024.

ATTEST:

**PARKER POINTE COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

By:_____

Its:_____

Exhibit A: Budget
Exhibit B: Assessment Roll

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

11A

MIAMI TODAY

2000 S. Dixie Highway, Suite 105A, Miami, FL 33133 (305) 358-2663

Published Weekly
Miami, Miami-Dade County, Florida
STATE OF FLORIDA
COUNTY OF MIAMI DADE:

Before the undersigned authority personally appeared:
Steve Rosenberg

Who on oath says that he/she is:

Advertising Sales Consultant
of Miami Today, a weekly newspaper published at
Miami in Miami-Dade County, Florida; that the
attached copy of a notice of publication:

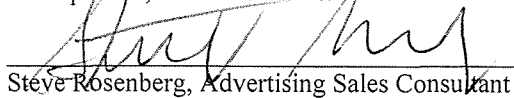
PUBLIC NOTICE Request for Qualifications For Engineering Services For The Parker Pointe Community Development District

Was published in said newspaper in the issue(s) of:

7/25/24

Affidavit further says that the said Miami Today is a Newspaper published at Miami, in the said Miami-Dade County, Florida and that the said newspaper has heretofore been continuously published in Miami-Dade County, Florida each week and has been entered as second-class mail matter at the post office in Miami, in the said Miami-Dade County, Florida for a period of one year preceding the first publication of the attached copy of advertisement; and affiant further says that he/she has neither paid nor promised any person, firm or corporation any discount, rebate or commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Affiant further says that the website or newspaper complies with all the legal requirements for publication in chapter 50, Florida Statutes.


Steve Rosenberg, Advertising Sales Consultant

Notary



Sworn to and subscribed before me this

25th day of July 2024

Public Notice

REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES FOR THE PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT

RFQ for Engineering Services

The Parker Pointe Community Development District ("District"), located in the City of Homestead, Miami Dade County, Florida, announces that professional engineering services will be required on a continuing basis for the District's stormwater systems, and other public improvements authorized by Chapter 190, Florida Statutes. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual ("Applicant") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("Qualification Statement") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience in the City of Homestead, Miami Dade County, Florida; e) the geographic location of the Applicant's headquarters and offices; f) the current and projected workloads of the Applicant; and g) the volume of work previously awarded to the Applicant by the District. Further, each Applicant must identify the specific individual affiliated with the Applicant who would be handling District meetings, construction services, and other engineering tasks.

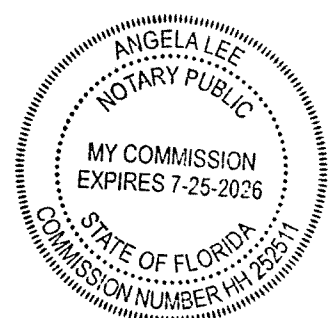
The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiations Act, Chapter 287, Florida Statutes ("CCNA"). All Applicants interested must submit one (1) electronic and one (1) unbound copy of Standard Form No. 330 and the Qualification Statement by 12:00 p.m., on August 9, 2024 by email to gillyardd@whhassociates.com ("District Manager's Office").

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager, and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant.

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Twenty Thousand Dollars (\$20,000.00).

Publication date: 7/25/24



PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

11B

**REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES
FOR THE PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT**

RFQ for Engineering Services

The Parker Pointe Community Development District ("**District**"), located in the City of Homestead, Miami Dade County, Florida, announces that professional engineering services will be required on a continuing basis for the District's stormwater systems, and other public improvements authorized by Chapter 190, *Florida Statutes*. The engineering firm selected will act in the general capacity of District Engineer and will provide District engineering services, as required.

Any firm or individual ("**Applicant**") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("**Qualification Statement**") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to past experience as a District Engineer for any community development districts and past experience in the City of Homestead, Miami Dade County, Florida; e) the geographic location of the Applicant's headquarters and offices; f) the current and projected workloads of the Applicant; and g) the volume of work previously awarded to the Applicant by the District. Further, each Applicant must identify the specific individual affiliated with the Applicant who would be handling District meetings, construction services, and other engineering tasks.

The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiations Act, Chapter 287, *Florida Statutes* ("**CCNA**"). All Applicants interested must submit one (1) electronic and one (1) unbound copy of Standard Form No. 330 and the Qualification Statement by 12:00 p.m., on August 9, 2024 by email to gillyardd@whhassociates.com ("**District Manager's Office**").

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager, and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant.

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses

associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Twenty Thousand Dollars (\$20,000.00).

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT

DISTRICT ENGINEER PROPOSALS

COMPETITIVE SELECTION CRITERIA

1) Ability and Adequacy of Professional Personnel (Weight: 25 Points)

Consider the capabilities and experience of key personnel within the firm including certification, training, and education; affiliations and memberships with professional organizations; etc.

2) Consultant's Past Performance (Weight: 25 Points)

Past performance for other Community Development Districts in other contracts; amount of experience on similar projects; character, integrity, reputation, of respondent; etc.

3) Geographic Location (Weight: 20 Points)

Consider the geographic location of the firm's headquarters, offices and personnel in relation to the project.

4) Willingness to Meet Time and Budget Requirements (Weight: 15 Points)

Consider the consultant's ability and desire to meet time and budget requirements including rates, staffing levels and past performance on previous projects; etc.

5) Certified Minority Business Enterprise (Weight: 5 Points)

Consider whether the firm is a Certified Minority Business Enterprise. Award either all eligible points or none.

6) Recent, Current and Projected Workloads (Weight: 5 Points)

Consider the recent, current and projected workloads of the firm.

7) Volume of Work Previously Awarded to Consultant by District (Weight: 5 Points)

Consider the desire to diversify the firms that receive work from the District; etc.

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

11C

RESPONSE TO REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT

**Alvarez Engineers, Inc.
8935 NW 35 Lane, Suite 101
Doral, FL 33172
(305)640-1345**

July 30, 2024





8935 NW 35 Lane, Suite 101 Doral, FL 33172

Tel (305) 640-1345

Email Alvarez@AlvarezEng.com

Website www.alvarezeng.com

July 30, 2024

Ms. Daphne Gillyard
Parker Pointe Community Development District
c/o Wrathell, Hunt and Associates, LLC
2300 Glades Road, Suite 410W
Boca Raton, FL 33431
gillyardd@whhassociates.com

Re.: Response to Request for Qualifications for Engineering Services for Parker Pointe CDD

Dear Ms. Gillyard,

Alvarez Engineers, Inc. is pleased to submit this proposal. Our firm is experienced and has the qualifications, personnel, and resources necessary to serve as District Engineer to Parker Pointe Community Development District (the "District" or "CDD"). Since 1998 our firm has been Engineering Consultant to over 80 Community Development Districts which have issued close to \$1,700,000,000 in bonds for financing public infrastructure.

Alvarez Engineers, Inc. serves the State of Florida from its office located in Doral, Florida. We are a civil engineering firm organized as a Florida S-Corporation, and the officers are Juan R. Alvarez and Marjorie Alvarez. For your consideration, I am enclosing Standard Form 330, which includes information regarding our corporation's personnel, qualifications, and experience. I have also included our State of Florida Minority Business.

Should Alvarez Engineers be selected to serve as District Engineer, I will be serving as the firm's Principal Officer. I will be the primary contact to handle District meetings, construction services and other engineering tasks, with the support of our staff listed in Standard Form 330. Alvarez Engineers is willing to meet time and budget requirements for Parker Pointe, and our recent, current, and projected workload will not hinder us from providing the required services.

Please do not hesitate to contact me at 305-640-1345 or at Juan.Alvarez@AlvarezEng.com, if you have any questions or require additional information.

Sincerely,
Alvarez Engineers, Inc.

DocuSigned by:

A handwritten signature in blue ink, appearing to read "Juan R. Alvarez", is written over a blue circular DocuSign verification mark.

91E21F8BCEDD4E0...
Juan R. Alvarez, P.E.
President

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION <i>(City and State)</i> Parker Pointe CDD (City of Homestead, Miami-Dade County, Florida)	
2. PUBLIC NOTICE DATE 7/24/2024	3. SOLICITATION OR PROJECT NUMBER

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE Juan R. Alvarez, P.E., President		
5. NAME OF FIRM Alvarez Engineers, Inc.		
6. TELEPHONE NUMBER 305-640-1345	7. FAX NUMBER 305-640-1346	8. E-MAIL ADDRESS Juan.Alvarez@Alvarezeng.com

C. PROPOSED TEAM

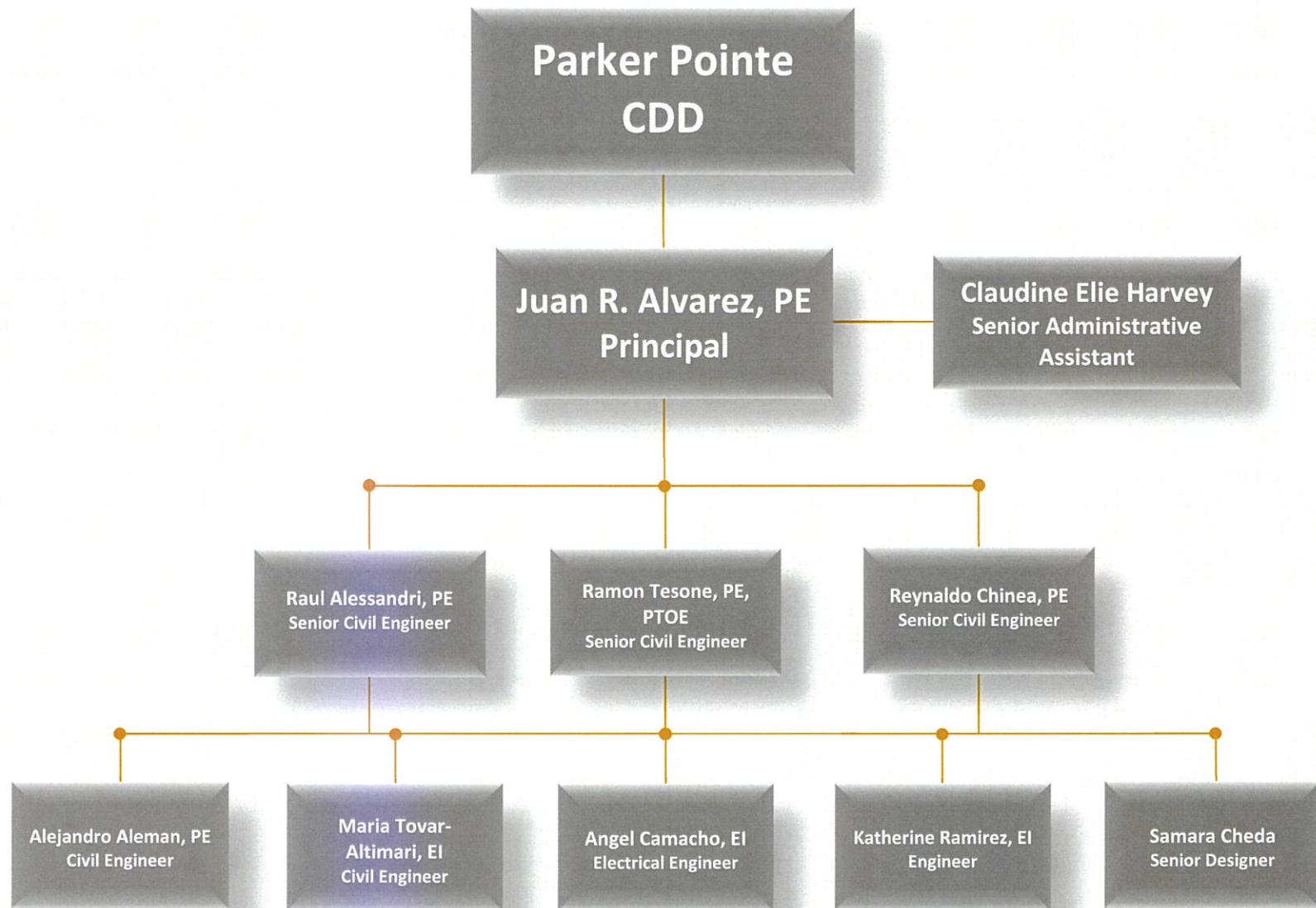
(Complete this section for the prime contractor and all key subcontractors.)

	(Check)			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	JV	SUBCONTRACTOR			
a.	✓			Alvarez Engineers, Inc.	8935 NW 35 Lane, Suite 101 Doral, FL 33172	District Engineer
				☐ CHECK IF BRANCH OFFICE		
b.						
				☐ CHECK IF BRANCH OFFICE		
c.						
				☐ CHECK IF BRANCH OFFICE		
d.						
				☐ CHECK IF BRANCH OFFICE		
e.						
				☐ CHECK IF BRANCH OFFICE		
f.						
				☐ CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

☒ (Attached)

Organizational Chart



E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Juan R. Alvarez, P.E	13. ROLE IN THIS CONTRACT Principal / District Engineer	14. YEARS EXPERIENCE <table border="1"> <tr> <td>a. TOTAL 44</td> <td>b. WITH CURRENT FIRM 28</td> </tr> </table>		a. TOTAL 44	b. WITH CURRENT FIRM 28
a. TOTAL 44	b. WITH CURRENT FIRM 28				
15. FIRM NAME AND LOCATION (City and State) Alvarez Engineers, Inc. (City of Doral, Florida)					
16. EDUCATION (Degree and Specialization) B.S. in Civil Engineering B.S in Architectural Engineering		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Florida Professional Engineer #38522			
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.) National Society of Professional Engineers; Florida Engineering Society; American Society of Civil Engineers					

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State) Grand Bay at Doral CDD (City of Doral, Miami Dade County, FL)	(2) YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES On going</td> <td>CONSTRUCTION (If applicable)</td> </tr> </table>		PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)			
a. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Grand Bay at Doral, a 334 acre residential development / Estimated Cost: \$168,000,000. Role: District Engineer / Professional services: 2006 - present				
(1) TITLE AND LOCATION (City and State) Beacon Tradeport CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES On going</td> <td>CONSTRUCTION (If applicable)</td> </tr> </table>		PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)			
b. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 377 gross-acre industrial and commercial development which includes Dolphin Mall and a 1,282 space parking garage / Estimated cost: \$90,000,000 Role: District Engineer / Professional services: 1998 - present				
(1) TITLE AND LOCATION (City and State) Landmark at Doral CDD (City of Doral, Miami-Dade County, FL)	(2) YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES On going</td> <td>CONSTRUCTION (If applicable)</td> </tr> </table>		PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)			
c. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Landmark at Doral, a 118 acre mixed use development. The development offers residential, retail, office and industrial uses / Estimated cost: \$75,000,000 Role: District Engineer / Professional services: 2005 - present				
(1) TITLE AND LOCATION (City and State) Centre Lake CDD (Town of Miami Lakes, Miami-Dade County, FL)	(2) YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES On going</td> <td>CONSTRUCTION (If applicable)</td> </tr> </table>		PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)			
d. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 142.67 acre residential development, which will give access and service to 256 single family units and 226 townhomes. / Estimated cost: \$48,433,917 Role: District Engineer / Professional services: 2015 - present				
(1) TITLE AND LOCATION (City and State) Two Lakes CDD (City of Hialeah, Miami-Dade County)	(2) YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES On going</td> <td>CONSTRUCTION (If applicable)</td> </tr> </table>		PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)			
e. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 221.58 acre residential development, which will give access and service to 396 single family homes, and 1,273 townhomes and 335 Villas. / Estimated cost: \$66,541,617 Role: District Engineer / Professional services: 2016 - present				



Juan R. Alvarez, P.E.
District Engineer



Education

B.S., Civil Engineering,
University of Miami, 1979

B.S., Architectural
Engineering,
University of Miami, 1979

Registrations

Professional Engineer
Florida # 38522

Professional Affiliations

National Society of
Professional
Engineers

Florida Engineering
Society

Office Location

8935 NW 35 Lane
Suite 101
Doral, FL 33172

Employment with Alvarez Engineers

1996 – Present

Mr. Alvarez is the founder and President of Alvarez Engineers, a company specializing in Civil Engineering, with offices in Miami, Florida. He has had extensive experience in the past 44 years in the fields of Highway Design, Land Development, Community Development Districts, Stormwater Management Systems and Architectural Engineering projects.

Alvarez Engineers, under the leadership of Mr. Alvarez, has been providing Highway Design engineering services to the Florida Department of Transportation continuously for over 25 years in Miami-Dade and Monroe counties. Alvarez Engineers has acquired extensive experience designing numerous other roadway projects of varying sizes for the Consultant Management and Drainage divisions of FDOT, including Drainage, Signing and Pavement Marking, Signalization and Street Lighting located from the rural highways in the Lower Keys to the highly-urbanized area of Downtown Miami.

Mr. Alvarez' experience has enabled him to successfully complete and coordinate projects with agencies such as the Florida Department of Transportation, Miami-Dade County Expressway Authority, Miami-Dade Public Works, Miami-Dade DERM, Miami Dade WASD, South Florida Water Management District, the United States Army Corps of Engineers, the Department of Environmental Protection, Southwest Florida Water Management District, Saint Johns River Water Management District, the City of Miami, the City of Miami Beach, the City of North Miami, Surfside, Hallandale Beach and others.

CDD project experience includes on-going services as District Engineer for:

Villa Portofino East CDD – City of Homestead, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 143 townhomes on 30.80 acres. Client: Villa Portofino East CDD. District Manager: Governmental Management Services. (2023 – Present)

Princeton Commons CDD – Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 87 townhomes on 9.84 acres. Client: Princeton Commons CDD. District Manager: Governmental Management Services. (2023 – Present)

Aventura Isles CDD – Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 166 townhomes, and 487 single family homes on 148.15 acres. Client: Aventura Isles CDD. District Manager: Wrathell, Hunt and Associates, LLC. (2022 – Present)

Biscayne Drive Estates CDD – Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 148 single family units within 64.02 acres. Client: Biscayne Drive Estates CDD. District Manager: Governmental Management Services. (2021 – Present)

Griffin Lakes CDD – City of Dania Beach, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 427 townhomes on 33.62 acres. Client: Griffin Lakes CDD. District Manager: Governmental Management Services. (2021 – Present)

Merrick Square CDD – Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 211 townhomes on 23.50 acres. Client: Merrick Square CDD. District Manager: Wrathell, Hunt and Associates, LLC. (2021 – Present)

Bauer Drive CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 105 townhomes on 13.85 acres. Client: Bauer Drive CDD. District Manager:



Governmental Management Services. (2021 – Present)

Silver Palms West CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 183 single family homes, 253 villas, and 217 townhomes on 79.27 acres. Client: Silver Palms West CDD. District Manager: Governmental Management Services. (2021 – Present)

Solterra CDD – Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 87 affordable townhomes, 413 townhomes, and 400 single family units on 160.95 acres. Client: Solterra CDD. District Manager: Governmental Management Services. (2021 – Present)

Westview North CDD – Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 102 single family homes, 346 villa units, and 285 townhomes on 88.12 acres. Client: Westview North CDD. District Manager: Governmental Management Services. (2021 – Present)

Homestead 50 CDD – Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 117 single family units, 183 townhomes on 51.8 acres. Client: Homestead 50 CDD. District Manager: Governmental Management Services. (2021 – Present)

Vizcaya in Kendall CDD – Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 297 single family units, 19 live/work units, and 470 townhomes on 160 acres. Client: Vizcaya in Kendall CDD. District Manager: Governmental Management Services. (2020 – Present)

Pine Isle CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 57 single family units, 211 villa units, and 188 townhomes on 45.10 acres. Client: Pine Isle CDD. District Manager: Governmental Management Services. (2020 – Present)

Crystal Cay CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 32 single family units, 153 townhomes and 140 townhomes-villas on 60.31 acres. Client: Crystal Cay CDD. District Manager: Governmental Management Services. (2020 – Present)

Botaniko CDD – City of Weston, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 125 single family homes on 116.93 acres. Client: Botaniko CDD. District Manager: Governmental Management Services. (2020 – Present)

Sawyer's Landing CDD – City of Miami, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to an 18-story, 578-apartment unit residential/commercial building with a 955-space public parking garage on 3.42 acres. Client: Sawyer's Landing CDD. District Manager: Governmental Management Services. (2019 – Present)

Kingman Gate CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 117 single family units, 349 townhomes and 304 villas on 79.62 acres. Client: Kingman Gate CDD. District Manager: Governmental Management Services. (2019 – Present)

Century Park South CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 156 condominiums and 121 townhomes on 18.73 acres. Client:



Juan R. Alvarez, P.E.
District Engineer

Century Park South CDD. District Manager: Special District Services, Inc. (2019 – Present)

Hemingway Point CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 321 single family homes on 57.6 acres. Client: Hemingway Point CDD. District Manager: Governmental Management Services. (2018 – Present)

Waterstone CDD – Saint Lucie County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 544 single family homes and 176 multifamily units on 240.07 acres. Client: Waterstone CDD. District Manager: Governmental Management Services. (2018 – Present)

Quail Roost CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 85 single family units on 33.08 acres. Client: Quail Roost CDD. District Manager: Governmental Management Services. (2018 – Present)

San Simeon CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 55 single family units and 647 townhomes, for a total of 702 residential units on 181.35 acres. Client: San Simeon CDD. District Manager: Governmental Management Services. (2018 – Present)

Century Park Place CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 122 townhomes on 9.58 acres. Client: Century Park Place CDD. District Manager: Special District Services, Inc. (2017 – Present)

Downtown Doral South CDD – City of Doral, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to single family units, 557 townhomes and 398 multi-family units on 123.39 acres. Client: Downtown Doral South CDD. District Manager: Governmental Management Services. (2016 – Present)

Oakridge CDD - City of Hollywood, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to single family units on 242.80 acres. Client: Oakridge CDD. District Manager: Governmental Management Services. (2016 – Present)

Two Lakes CDD - City of Hialeah, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 203 single family units, 256 townhomes, and 506 villas on 130.14 acres. Client: Two Lakes CDD. District Manager: Special District Services, Inc. (2016 – Present)

Oleta River CDD - City of North Miami, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 3,755 residential units, 560 Assisted/Independent Unit Facilities, condominium units, 150 hotel rooms, and approximately 1,491,256 square feet of commercial, office, vehicle sales and display, institutional and/or retail space on 183.55 acres. Client: Oleta River CDD. District Manager: Governmental Management Services. (2016 – Present)

Centre Lake CDD - Town of Miami Lakes, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 256 single family units and 226 townhomes on 142.67 acres. Client: Centre Lake CDD. District Manager: Governmental Management Services. (2016 – Present)

Coco Palms CDD - Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 181 single family units, 309 townhomes and 253 villas homes on 91.43 acres. Client: Coco



Juan R. Alvarez, P.E.
District Engineer

Palms CDD, District Manager: Special District Services, Inc. (2014 – Present)

Bonterra CDD – City of Hialeah, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 858 residential units on 109 acres. Client: Bonterra CDD. District Manager: Inframark Infrastructure Management Services. (2015 – 2019)

Lakes by the Bay South CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to single family and multi-family units on 516 acres. Client: Lakes by the Bay South CDD. District Manager: Governmental Management Services. (2015 – Present)

South Kendall CDD – Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 155 homes on 54.30 acres. Client: South Kendall CDD. District Manager: Governmental Management Services. (2013 – Present)

Academical Village CDD – Town of Davie, Broward County, FL. District Engineer overseeing the development of the infrastructure on a university campus on 39.54 acres. Client: Academical Village CDD. District Manager: Governmental Management Services. (2010 – Present).

Hollywood Beach CDD 1 – City of Hollywood Beach, Broward County, FL. District Engineer overseeing the development of the infrastructure of a guest room hotel building with a public and guest parking garage on 5.13 acres. Client: Hollywood Beach CDD 1. District Manager: Governmental Management Services. (2011 – Present).

Spicewood CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure on 77.72 acres. Client: Spicewood CDD. District Manager: Inframark Infrastructure Management Services. (2011 – Present)

Midtown Miami CDD, City of Miami, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to residential and commercial units on 56 acres. Client: Midtown Miami CDD. District Manager: Wrathell, Hunt & Associates, LLC. (2010 – Present).

Meadow Pines CDD, City of Pembroke Pines, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 812 townhouses on 123.30 acres. Client: Meadow Pines CDD. District Manager: Special District Services, Inc. (2009 – 2010).

Stonegate CDD, City of Homestead, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 1,055 dwelling units on 137 acres. Client: Stonegate CDD. District Manager: Wrathell, Hunt & Associates, LLC. (2008 – Present).

Palace at Coral Gables CDD, City of Coral Gables, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 243 independent and assisted living units, approximately 9,314 sf of retail space in the residential building and 3,654 sf in the parking, and 564 parking stalls (337 public and 227 private) on 2.5 acres. Client: The Palace Group CDD. District Manager: The Palace Management. (2008 – Present).

Trails at Monterey CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure. The infrastructure is a network of roadway, drainage, water and sanitary sewer systems on 92.47 acres. Client: Trails at Monterey CDD. District Manager: Special District Services, Inc. (2008 – Present).

Crestview West CDD, Miami-Dade County, FL. District Engineer overseeing



the development of the infrastructure that will give access and service to 114 single family units on 25.26 acres. Client: Crestview West CDD. District Manager: Special District Services, Inc. (2008 – Present).

Venetian Parc CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 604 residential units on 122 acres. Client: Venetian Parc CDD. District Manager: Special District Services, Inc. (2007 – Present).

Keys Edge CDD, Florida City, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 174 townhomes, 624 villas and 389 “zero lot line” residential units for a total of 1,187 dwelling units on 81.84 acres. Client: Keys Edge CDD. District Manager: Special District Services, Inc. (2007 – Present).

Century Gardens at Tamiami CDD, Miami Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 844 residential units on 121 acres. Client: Century Gardens at Tamiami CDD. District Manager: Special District Services, Inc. (2007 – Present).

The Village at Gulfstream Park CDD, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 1,500 multi-family dwelling units, a hotel, 750,000 square feet of retail space, 140,000 square feet of office space, and a movie theater on 54.60 acres. Client: The Village at Gulfstream Park CDD. District Manager: PFM Group Consulting LLC. (2007 – Present).

Majorca Isles CDD, City of Miami Gardens, Miami-Dade County FL. District Engineer overseeing the development of the infrastructure that will give access and service to 594 single family dwelling units on 60.13 acres. Client: Majorca Isles CDD. District Manager: Governmental Management Services. (2007 – Present).

Coconut Cay CDD, City of Miami Gardens, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 543 single family dwelling units on 108 acres. Client: Coconut Cay CDD. District Manager: Governmental Management Services. (2007 – Present).

Enclave at Black Point Marina CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 240 single family units on 50.38 acres. Client: Enclave at Black Point Marina CDD. District Manager: Governmental Management Services. (2007 – Present).

Walnut Creek CDD, City of Hallandale, Broward County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 759 single family dwellings and 153 villas/townhomes on 227 acres. Client: Walnut Creek CDD. District Manager: Special District Services, Inc. (2007 - 2012).

Downtown Doral CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to construct 2,840 residential units, as well as 650,000 SF of retail and office space, and 100,000 SF of civic space dwelling units on 90.30 acres. Client: Downtown Doral CDD. District Manager: Governmental Management Services. (2006 – Present).

Grand Bay at Doral CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 2,469 residential units, 148 units of workshop, and 1,489 rental units on 334.48 acres. Client: Grand Bay at Doral CDD. District Manager: Special District Services, Inc. (2006 – Present).



Juan R. Alvarez, P.E.
District Engineer

Century Gardens Village CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 272 dwellings on 38.25 acres of land. Client: Century Gardens Village CDD. District Manager: Special District Services, Inc. (2006 – Present).

Lake Frances CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 143 single family dwelling units on 47.89 acres of land. Client: Lake Frances CDD. District Manager: Special District Services, Inc. (2006 – Present).

Fontainebleau Lakes CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to construct 1,386 mid-rise condominium units, 238 courtyard units and 212 townhomes on 272.12 acres of land. Client: Fontainebleau Lakes CDD. District Manager: Special District Services, Inc. (2006 – Present).

South-Dade Venture CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 2,274 dwellings on 389 acres of land. Client: South Dade Venture CDD. District Manager: Governmental Management Services. (2006 – Present).

Coronado CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 327 condominium dwelling units on 17.41 acres of land. Client: Coronado CDD. District Manager: Special District Services, Inc. (2006 – Present).

Waterford Estates CDD, Charlotte County, FL. District engineer overseeing the development of the infrastructure that will give service to 211 single family units, 266 duplexes and 224 quadruplex dwellings on 193 acres of land. Client: Waterford Estates CDD. District Manager: Governmental Management Services. (2006 – Present).

Crestview II CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give service to 120 single family units on 30 acres of land. Client: Crestview II CDD. District Manager: Special District Services, Inc. (2005 – Present).

Keys Cove II CDD, City of Homestead, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 523 townhomes and 406 executive townhomes on 84 acres of land. Client: Keys Cove II CDD. District Manager: Special District Services, Inc. (2005 – Present).

Coral Keys Homes CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 614 residential units on 43.27 acres of land. Client: Coral Keys Homes CDD. District Manager: Governmental Management Services. (2005 – Present).

Landmark at Doral CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 1,100 residential units, 94,700 SF of retail space, 93,346 SF of office and 180,000 SF of flex office space on 118 acres of land. Client: Landmark at Doral CDD. District Manager: Wrathell, Hunt & Associates, LLC. (2005 – Present).

Summerville CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 111 townhouses and 156 single family residences on 47.88 acres of land. Client: Summerville CDD. District Manager: Special District Services, Inc. (2004 – Present).

Islands at Doral Townhomes CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give



Juan R. Alvarez, P.E.
District Engineer

access and service to 145 townhomes on 20 acres of land. Client: Islands at Doral Townhomes CDD. District Manager: Governmental Management Services. (2004 – Present).

Keys Cove CDD, City of Homestead, Miami-Dade County, FL. District engineer overseeing the development of the infrastructure that will give access and service to 398 villas and 576 courtyard condominiums on 72.41 acres of land. Client: Keys Cove CDD. District Manager: Special District Services, Inc. (2004 – Present).

Kendall Breeze West CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 208 townhouse units on 26.34 acres of land. Client: Kendall Breeze West CDD. District Manager: Special District Services, Inc. (2004 – Present).

Valencia Acres CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 144 single family dwelling units 63.89 acres of land. Client: Valencia Acres CDD. District Manager: Special District Services, Inc. (2004 – Present).

Bluewaters CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 246 single family dwelling units and 230 townhomes on 80 acres of land. Client: Bluewaters CDD. District Manager: Special District Services, Inc. (2003 – Present).

Cutler Cay CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 505 single family units 215.34 acres of land. Client: Cutler Cay CDD. District Manager: Special District Services, Inc. (2003 – Present).

Islands at Doral III CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 771 three story garden dwelling units, 720 townhomes and 227 single family residences on 262 acres of land. Client: Islands at Doral III CDD. District Manager: Governmental Management Services. (2003 – Present).

Tree Island Estates CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 178 single family dwellings and 96 townhouses on 86 acres of land. Client: Tree Island Estates CDD. District Manager: Special District Services, Inc. (2003 – Present).

Islands at Doral NE CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 66 single family dwellings, 125 townhomes and 340 condominium residences on 71.70 acres of land. Client: Islands at Doral NE CDD. District Manager: Special District Services, Inc. (2003 – Present).

Century Gardens CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 330 family dwelling units on 76.11 acres of land. Client: Century Gardens CDD. District Manager: Special District Services, Inc. (2003 – Present).

Sausalito Bay CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 225 single family dwellings and 204 townhouses on 104 acres of land. Client: Sausalito Bay CDD. District Manager: Special District Services, Inc. (2002 – Present).

Islands at Doral SW CDD, City of Doral, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 101 single family dwellings and 563 townhouses on 108 acres of land. Client: Islands at Doral SW CDD. District Manager: Special District Services, Inc. (2002 – Present).



Juan R. Alvarez, P.E.
District Engineer

Venetian Isles CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 358 single family dwellings and 216 townhouses on 127.52 acres of land. Client: Venetian Isles CDD. District Manager: Special District Services, Inc. (2002 – Present).

Pentathlon CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 514 single family dwellings on 95.12 acres of land. Client: Pentathlon CDD. District Manager: Special District Services, Inc. (2002 – Present).

Kendall Breeze CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 129 single family dwellings and 650 townhouses on 90 acres of land. Client: Kendall Breeze CDD. District Manager: Special District Services, Inc. (2002 – Present).

Beacon Lakes CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to the industrial and commercial buildings on 478 acres of land. Client: Beacon Lakes CDD. District Manager: Inframark Infrastructure Management Services. (2002 – Present).

Century Parc CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to 692 condominium units and 74 townhomes on 48 acres of land. Client: Century Parc CDD. District Manager: Special District Services, Inc. (2001 – Present).

Beacon Tradeport CDD, Miami-Dade County, FL. District Engineer overseeing the development of the infrastructure that will give access and service to industrial and commercial buildings within the development on 377 acres of land. Client: Beacon Tradeport CDD. District Manager: Governmental Management Services (1998 – Present).

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Raul E. Alessandri, P.E.	Senior Civil Engineer	a. TOTAL 35	b. WITH CURRENT FIRM 25
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION <i>(Degree and Specialization)</i> B. S. School of Engineering and Applied Science Masters Business Administration		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Florida Professional Engineer #75506	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> American Society of Civil Engineers; National Society of Professional Engineers; Florida Engineering Society; MOT / TTC Advanced Certification			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> SR-860 / Miami Gardens Dr. at Biscayne Blvd., (City of Miami Gardens, Miami Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2018	CONSTRUCTION <i>(If applicable)</i>
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm Intersection Safety Improvement project including horizontal alignment correction along Miami Gardens Drive, milling and resurfacing, addition of a pedestrian crosswalk, replacement of one traffic signal structure and addition of back plates, modification of lighting, and signing and pavement marking. Responsibilities: design of roadway, signing and pavement marking, signalization and lighting. Client: FDOT D6, Cost: \$ 805,632 / 2016- 2018.		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-5 / SE 2nd Ave., from SE 2nd St. to SE 4th St.	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2017	CONSTRUCTION <i>(If applicable)</i>
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm RRR and safety project for a 3-lane urban roadway; compliance with ADA accessibility standards. Design of roadway, signing and pavement marking, signalization and lighting / Construction Cost: \$1,701,482 (estimated) Role: Lighting and Signalization Engineer of Record Professional Services: 2014 - 2017		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-932 / NW 103 St. / W 49th St., from W 12th Ave. to E 5th Ave (City of Hialeah, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2016	CONSTRUCTION <i>(If applicable)</i>
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm Safety improvement project, for a 2.24 mile, 6-lane divided urban principal arterial with three lanes in each direction. Design of roadway, SPM and signalization / Construction Cost: \$728,967 (estimated) Role: Project Manager and Engineer of Record Professional Services: 2015 - 2016		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-5 / US-1 / S. Dixie Hwy., from C-100A Canal to SW 100 St. (Miami Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2015	CONSTRUCTION <i>(If applicable)</i>
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm Intersection safety project to improve the horizontal alignment for 0.5 mile of US-1 and create an auxiliary lane on the NB direction. Design of roadway, SPM, signalization and lighting. Construction cost: \$2,635,893 (estimated) Role: Project Manager and Engineer of Record Professional Services: 12/2013 – 2015		
(1) TITLE AND LOCATION <i>(City and State)</i> SR-5 / US-1 / Ovs. Hwy. from W. of Indies Dr. (MM 27.4) to W. of Ships Way (MM 29.5) / (Monroe County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2013	CONSTRUCTION <i>(If applicable)</i> 2015
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm Restoration, Rehabilitation and Resurfacing of a 2-lane, 2 mile undivided rural road. Design of roadway and signing and pavement markings. Construction Cost: \$1,483,128 Role: Project Engineer Professional Services: 2011 - 2013		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Reynaldo Chinea, P.E.	13. ROLE IN THIS CONTRACT Senior Civil Engineer	14. YEARS EXPERIENCE a. TOTAL 39 b. WITH CURRENT FIRM 25	
15. FIRM NAME AND LOCATION <i>(City and State)</i> Alvarez Engineers, Inc. (City of Doral, FL)		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Florida Professional Engineer #58579	
16. EDUCATION <i>(Degree and Specialization)</i> B.S. in Civil Engineering M.S. in Regional Development and Population			
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i> The Irrigation Association; Colegio Cubano de Ingeniero Agrónomos; MOT / TTC Advanced Certification			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> Downtown Doral CDD (City of Doral, Florida)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION <i>(If applicable)</i>	
a. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Downtown Doral, a 90.3 acre commercial and residential development. / Estimated Cost: \$42,405,843 Role: Senior Civil Engineer / Professional services: 2006 - present		
(1) TITLE AND LOCATION <i>(City and State)</i> Hollywood Beach CDD 1 (City of Hollywood Beach, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION <i>(If applicable)</i>	
b. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was established for the purpose of financing, acquiring or constructing, maintaining and operating the public portion of the parking garage, which is part of the infrastructure necessary to support the Project. It covers 5.13 acres, includes a 17-story, 347 guest room hotel building with a public and guest parking garage / Estimated Cost: \$28,395,000 Role: Senior Civil Engineer / Professional services: 2011 - present		
(1) TITLE AND LOCATION <i>(City and State)</i> Islands at Doral III CDD (City of Doral, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION <i>(If applicable)</i>	
c. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Islands at Doral III, a 262 acre residential development. Estimated Cost: \$27,741,113 Role: Senior Civil Engineer / Professional services: 2003 - present		
(1) TITLE AND LOCATION <i>(City and State)</i> Century Gardens at Tamiami CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION <i>(If applicable)</i>	
d. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Century Gardens at Tamiami, a 121 acre residential development. Estimated Cost: \$22,272,000 Role: Senior Civil Engineer / Professional services: 2007 - present		
(1) TITLE AND LOCATION <i>(City and State)</i> Crestview West CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION <i>(If applicable)</i>	
e. (3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE ☒ Check if project performed with current firm The Crestview West Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Crestview West, a 25.26 acre residential development. / Estimated Cost: \$4,114,740 Role: Senior Civil Engineer / Professional services: 2008 - present		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Ramon Tesone, P.E., PTOE	13. ROLE IN THIS CONTRACT Senior Civil Engineer	14. YEARS EXPERIENCE a. TOTAL 25 b. WITH CURRENT FIRM 20	
15. FIRM NAME AND LOCATION (City and State) Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION (Degree and Specialization) B.S. in Civil Engineering	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Florida Professional Engineer # 56070 PTOE # 2803		
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.) Professional Traffic Operations Engineer Certification; MOT / TTC Advanced Certification			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State) SR-A1A/ Indian Creek Drive from Abbott Ave to 63 Street (0.6 miles), (Miami Beach, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2019 CONSTRUCTION (If applicable)	
a. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☐ Check if project performed with current firm Pavement rehabilitation project that consisted of milling and resurfacing, reconstruction of existing substandard pedestrian ramps, upgrade of three signalized intersections with video detection and provision of full pedestrian actuation, and signing and pavement marking improvements. Role: Engineer of Record for the Roadway and Signalization.		
(1) TITLE AND LOCATION (City and State) SR 973 / NW 87 Ave at NW 7 Street (0.3 miles), MDC, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2018 CONSTRUCTION (If applicable)	
b. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☐ Check if project performed with current firm Safety project to widen NW 87th Ave to provide an auxiliary right turn lane to NW 7 St. The project also included providing drainage French drains, replacement of mast arms at two intersections and signing and pavement marking improvements. Role: Engineer of Record for the Roadway, Drainage and Signing and Pavement Markings.		
(1) TITLE AND LOCATION (City and State) SR 826 / Palmetto Expressway Ramps and Frontage Road (1.3 miles), MDC, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2018 CONSTRUCTION (If applicable)	
c. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☐ Check if project performed with current firm RRR project to rehabilitate five ramps and a frontage road on the SR 826 system. The project included roadway resurfacing, shoulder widening, providing a bicycle lane along the frontage road, and miscellaneous drainage, signalization and signing and pavement markings improvements. Role: Engineer of Record for the Roadway, Drainage, SPM and Signalization improvements.		
(1) TITLE AND LOCATION (City and State) SR-959 / SW 57 Ave., from SW 24 St. to SW 8 St. (1.1 miles), MDC, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2010 CONSTRUCTION (If applicable)	
d. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☐ Check if project performed with current firm widening project from 2 lanes to 3 lanes which includes sidewalk reconstruction, drainage improvements, signing and pavement markings, signalization and lighting improvements. The lighting included installation of a new lighting system with decorative poles. Role: Engineer of Record for the Signalization and Lighting improvements.		
(1) TITLE AND LOCATION (City and State) SR 9 / NW 27 Ave from N. of NW 141 St. to I-95 Park & Ride On-Ramp (2.1 miles), MDC, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2013 CONSTRUCTION (If applicable)	
e. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Resurfacing project of a 4-lane divided arterial which included cross slope correction, addition of bicycle lanes, ADA improvements, signalization, lighting and upgrades to bridge railings. Role: Engineer of Record (EOR) for the Roadway, SPM, Lighting and Signalization.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Alejandro Aleman, P.E.	Civil Engineer	a. TOTAL 4	b. WITH CURRENT FIRM <1
15. FIRM NAME AND LOCATION (City and State) Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION (Degree and Specialization) B.S. in Civil Engineering		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
Downtown Doral South CDD (City of Doral, Miami-Dade County, FL)	PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
a. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Downtown Doral South a 129.93 acre development. Estimated Cost: \$139,716,000 Role: Civil Engineer / Professional services: 2024 - present ☒ Check if project performed with current firm		
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
Landmark at Doral CDD (City of Doral, FL)	PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
b. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Landmark at Doral, a 133 acre residential development. Estimated Cost: \$77,389,000 Role: Civil Engineer / Professional services: 2024 - present ☒ Check if project performed with current firm		
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
Waterford Estates CDD (Charlotte County, FL)	PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
c. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Waterford Estates, a 193 acre residential development. Estimated Cost: \$11,894,000 Role: Civil Engineer / Professional services: 2024 - present ☒ Check if project performed with current firm		
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
Oakridge CDD (Broward County, FL)	PROFESSIONAL SERVICES On going	CONSTRUCTION (If applicable)
d. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE The CDD was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Oakridge, a 242 acre residential development. Estimated Cost: \$3,105,686 Role: Civil Engineer / Professional services: 2024 - present ☒ Check if project performed with current firm		
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
e. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☐ Check if project performed with current firm		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Maria Tovar- Altimari, E.I.	Civil Engineer	a. TOTAL 13	b. WITH CURRENT FIRM 13
15. FIRM NAME AND LOCATION (City and State) Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION (Degree and Specialization) B.S. in Civil Engineering		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.) MOT / TTC Advanced Certification			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State) SR-932 / NW 103 St. / W. 49 St., from W. 12 Ave. to E 5 Ave. (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2017	CONSTRUCTION (If applicable)
a. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Safety improvement project, for a 2.24 mile, 6-lane divided urban principal arterial with three lanes in each direction. Design of roadway, SPM and signalization./ Construction Cost: \$728,967 (estimated) Role: Engineering Technician responsible for the design of roadway signing and pavement marking Professional Services: 2015 - Present		
(1) TITLE AND LOCATION (City and State) SR-5 / US-1 / S. Dixie Hwy. at SR-9 / SW 27 Ave. (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2014	CONSTRUCTION (If applicable) 2015
b. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Intersection improvements on a 6-lane divided urban road including roadway resurfacing, pavement widening, cross slope correction, roadside safety improvement, signing and pavement marking, signalization upgrades per safety. Construction Cost: \$1,061,110 Role: Engineering Technician preparing report and performed QAQC / Professional Services: 2012 - 2014		
(1) TITLE AND LOCATION (City and State) SR-5 / US-1 / S. Dixie Hwy., from C-100A Canal to SW 100 St. (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2015	CONSTRUCTION (If applicable)
c. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Intersection safety project to improve the horizontal alignment of US-1 and create an auxiliary lane on the NB direction. Design of roadway, SPM, signalization and lighting. / Construction Cost: \$2,635,893 (estimated). Role: Engineering Technician responsible for the design of signing and for QAQC / Professional Services: 2013-2015		
(1) TITLE AND LOCATION (City and State) SR-994 / SW 186 St., from E. of SR-821 Florida's Turnpike to W. of SR-5/US1/S. Dixie / (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2014	CONSTRUCTION (If applicable) 2015
d. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Ride rehabilitation project with ADA improvements and utility adjustments for a 5-lane 1 mile undivided roadway. Construction Cost: \$485,546 Role: Engineering Technician responsible for QAQC/ Professional Services: 2012 - 2014		
(1) TITLE AND LOCATION (City and State) SR-9 / NW 27th Ave., from NW 141st St. to I-95 On-Ramp (Miami-Dade County, FL)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2014	CONSTRUCTION (If applicable) 2015
e. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Resurfacing project for a 4-lane 2.1 mile divided roadway; design included roadway, signing and pavement marking, signalization and lighting. / Construction Cost: \$2,431,819 Role: Engineering Technician responsible for QAQC / Professional Services: 2012 - 2014		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT*(Complete one Section E for each key person.)*

12. NAME Angel Camacho, E.I., E.E.	13. ROLE IN THIS CONTRACT Electrical Engineer	14. YEARS EXPERIENCE a. TOTAL 6 b. WITH CURRENT FIRM 6	
15. FIRM NAME AND LOCATION (City and State) Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION (Degree and Specialization) B.S. in Electrical Engineering M.A. in Engineering Management		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State) NW 122 Ave., from NW 25 St. to NW 41 St. (1.0 mile), Miami Dade County, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2018 CONSTRUCTION (If applicable)	
a. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Construction of a new urban 2-lane road. Shop drawing review and approval. Responsibilities: review of shop drawings, inspections, permit coordination, utility coordination, responded to request for information, coordinated and performed inspections, design of fencing plan per FDOT specs, maintenance coordination. Role: Engineering Technician. Design Dates: 06/2018 – Present.		
(1) TITLE AND LOCATION (City and State) SR-A1A / Collins Ave. at 79 St., City of Miami Beach, Miami Dade County, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2019 CONSTRUCTION (If applicable)	
b. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Intersection Safety Improvement project to add crosswalks and a signal. Design of roadway, SPM and signalization. Responsibilities: design of signalization. Role: Engineering Technician. Design Dates: 10/2017 – 01/2019.		
(1) TITLE AND LOCATION (City and State) SR-5 / S. Dixie Hwy. at SW 127 Ave./SW 232 St. (0.14 mile), Miami Dade County, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2019 CONSTRUCTION (If applicable)	
c. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Intersection safety improvements including milling and resurfacing, modification of traffic separator, replacement of one traffic signal structure and addition of signal back plates. Responsibilities: design of signalization: addition of new loop window and pull boxes, update of runs for conduits, and relocation of existing lighting conduit in conflict with new location of mast arm. Client: FDOT D6, Role: Engineering Technician. Design Dates: 2/2017 – 01/2019.		
(1) TITLE AND LOCATION (City and State) SR-817 / NW 27 Ave. from NW 171 St. to NW 177 St. (0.38 mile), Miami Dade County, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2018 CONSTRUCTION (If applicable)	
d. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Pedestrian safety improvement project. Design of roadway, SPM, signalization and lighting. Responsibilities: post design: revision for relocation mast arm. Client: FDOT D6. Design Dates: 12/2015 – 07/2017. Post Design services in 2018. Role: Engineering Technician.		
(1) TITLE AND LOCATION (City and State) SR-5 / US-1 / S. Dixie Hwy., from C-100A Canal to SW 100 St. (0.5 mile), Miami Dade County, FL	(2) YEAR COMPLETED PROFESSIONAL SERVICES 2018 CONSTRUCTION (If applicable)	
e. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm Scope: Intersection safety project to improve the horizontal alignment of US-1 and create an auxiliary lane on the NB direction. Design of roadway, SPM, signalization and lighting. Responsibilities: post design: revision of plans; field reviews for RFIs and location pull boxes for video camera; addition of video detection camera and zones, and blue toad to signalization plans. Client: FDOT D6, Design Dates: 12/2013 – 12/2016. Role: post design: Engineering Technician.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Katherine Ramirez, E.I.	13. ROLE IN THIS CONTRACT Engineer	14. YEARS EXPERIENCE a. TOTAL 5 b. WITH CURRENT FIRM 2	
15. FIRM NAME AND LOCATION (City and State) Alvarez Engineers, Inc. (City of Doral, FL)			
16. EDUCATION (Degree and Specialization) B.S. in Petroleum Engineering		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State) Century Gardens at Tamiami CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (If applicable) On going	
a. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Century Gardens at Tamiami, a 121 acre residential development. Estimated Cost: \$22,272,000 Role: Civil Engineer / Professional services: 2022 - present		
(1) TITLE AND LOCATION (City and State) Islands at Doral III CDD (City of Doral, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (If applicable) On going	
b. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Islands at Doral III, a 262 acre residential development. Estimated Cost: \$27,741,113 Role: Civil Engineer / Professional services: 2022 - present		
(1) TITLE AND LOCATION (City and State) Cutler Cay CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (If applicable) On going	
c. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Cutler Cay, a 215.34 acre residential development. Estimated Cost: \$13,580,000 Role: Civil Engineer / Professional services: 2022 - present		
(1) TITLE AND LOCATION (City and State) Kendall Breeze CDD (Miami-Dade County)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (If applicable) On going	
d. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The CDD was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Kendall Breeze, a 90 acre residential development. Estimated Cost: \$5,866,000 Role: Civil Engineer / Professional services: 2022 - present		
(1) TITLE AND LOCATION (City and State) Century Parc CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (If applicable) On going	
e. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The CDD was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Century Parc, a 48 acre residential development. Estimated Cost: \$5,449,000 Role: Civil Engineer / Professional services: 2022 - present		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Claudine Elie Harvey	13. ROLE IN THIS CONTRACT Senior Administrative Assistant	14. YEARS EXPERIENCE a. TOTAL 25 b. WITH CURRENT FIRM 17	
15. FIRM NAME AND LOCATION (City and State) Alvarez Engineers, Inc. (Doral, FL)			
16. EDUCATION (Degree and Specialization) B.A. Business Administration (Marketing and International Business)		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State) Grand Bay at Doral CDD (City of Doral, Miami Dade County, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION (If applicable)	
a. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Grand Bay at Doral, a 334 acre residential development / Estimated Cost: \$168,000,000. Role: Senior Executive Assistant / Professional services: 2006 - present		
(1) TITLE AND LOCATION (City and State) Landmark at Doral CDD (City of Doral, Miami-Dade County, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION (If applicable)	
b. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Landmark at Doral, a 118 acre mixed use development. The development offers residential, retail, office and industrial uses / Estimated cost: \$75,000,000 Role: Senior Executive Assistant / Professional services: 2005 - present		
(1) TITLE AND LOCATION (City and State) Two Lakes CDD (City of Hialeah, Miami-Dade County)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION (If applicable)	
c. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 221.58 acre residential development, which will give access and service to 396 single family homes, and 1,273 townhomes and 335 Villas. / Estimated cost: \$66,541,617 Role: Senior Executive Assistant / Professional services: 2016 - present		
(1) TITLE AND LOCATION (City and State) Hollywood Beach CDD 1 (City of Hollywood Beach, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION (If applicable)	
d. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the public portion of the garage which is part of the infrastructure necessary to support the Project. / Estimated cost: \$28,395,000 Role: Senior Executive Assistant / Professional services: 2011 - present		
(1) TITLE AND LOCATION (City and State) Silver Palms West CDD (Miami-Dade County, FL)	(2) YEAR COMPLETED PROFESSIONAL SERVICES On going CONSTRUCTION (If applicable)	
e. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm The District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 79.27 acre residential development, which will give access and service to 253 villas, 217 townhomes and 183 single family units. / Estimated cost: \$24,483,225 Role: Senior Executive Assistant / Professional services: 2021 - present		

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 1		
21. TITLE AND LOCATION <i>(City and State)</i> Grand Bay at Doral Community Development District (City of Doral, Miami-Dade County, FL)		22. YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> </table>	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>			

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Grand Bay at Doral CDD	b. POINT OF CONTACT NAME Armando Silva, SDS Inc.	c. POINT OF CONTACT TELEPHONE NUMBER (561) 630-4922
--	---	--

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Grand Bay at Doral Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Grand Bay at Doral, a 334 acre residential development located in the City of Doral in Miami-Dade County, Florida. The development offers single family dwellings and includes 3 phases.

The infrastructure is a network of roadway, drainage, water and sanitary sewer systems that will give access and service to 2,469 residential units, 148 units of workshop, and 1,489 rental units.

Estimated Cost: \$ 168,600,000

District Engineer currently overseeing the development of the infrastructure (2006 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME a. Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
(1) FIRM NAME b.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME c.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME d.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME e.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME f.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 2		
21. TITLE AND LOCATION <i>(City and State)</i> Fontainebleau Lakes Community Development District (Miami-Dade County, FL)		22. YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> </table>	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>			

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Fontainebleau Lakes CDD	b. POINT OF CONTACT NAME Armando Silva, SDS Inc.	c. POINT OF CONTACT TELEPHONE NUMBER (561) 630-4922
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

District Engineer currently overseeing the development of the infrastructure.

The Fontainebleau Lakes Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Fontainebleau Lakes, a 272 acre residential development located in Miami-Dade County, Florida. The development offers mid-rise condominium units, courtyard units and townhomes.

The infrastructure is a network of roadway, stormwater management, water and sanitary sewer systems that will give access and service to construct 1,386 mid-rise condominium units, 238 courtyard units and 212 townhomes.

Estimated Cost: \$ 104,323,000



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME a. Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
(1) FIRM NAME b.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME c.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME d.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME e.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME f.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 3		
21. TITLE AND LOCATION <i>(City and State)</i> Lakes by the Bay South Community Development District (Miami-Dade County, FL)	22. YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> </table>		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>			

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Lakes by the Bay South CDD	b. POINT OF CONTACT NAME Luis Hernandez, GMS-SF, LLC	c. POINT OF CONTACT TELEPHONE NUMBER (954) 721-8681
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Lakes by the Bay South Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Lakes by the Bay South, a 516.54 acre residential development located in Miami-Dade County, Florida.

The infrastructure is a network of roadway, drainage, water and sanitary sewer systems that will give access and service to residential units.

Estimated Cost: \$ 99,416,450

District Engineer currently overseeing the development of the infrastructure (2015 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

(1) FIRM NAME a. Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
(1) FIRM NAME b.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME c.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME d.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME e.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
(1) FIRM NAME f.	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 4		
21. TITLE AND LOCATION <i>(City and State)</i> Downtown Doral South Community Development District (City of Doral, Miami-Dade County, FL)	22. YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> </table>		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>			

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Downtown Doral South CDD	b. POINT OF CONTACT NAME Rich Hans, GMS-SF, LLC	c. POINT OF CONTACT TELEPHONE NUMBER (954) 721-8681
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Downtown Doral South Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Downtown Doral, a 129.93 acre residential and a 6.54-acre commercial tract development located in the City of Doral, Miami-Dade County, Florida.

The infrastructure is a network of roadway, stormwater management, water and sanitary sewer systems that will give access and service to 343 single family units, 557 townhomes and 398 multi-family units for a total of 1,298 residential units, and a commercial development.

Estimated Cost: \$ 99,210,955.

District Engineer currently overseeing the development of the infrastructure (2016 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 5
21. TITLE AND LOCATION (City and State) Midtown Miami Community Development District (City of Miami, Miami-Dade County, FL)		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (If applicable)

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Midtown Miami CDD	b. POINT OF CONTACT NAME Greg Wrathell, Wrathell, Hunt & Associates	c. POINT OF CONTACT TELEPHONE NUMBER (561) 571-0010
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

District Engineer currently overseeing the development of the infrastructure.

The District financed the construction of a network of roadways within the boundaries of the District as well as improvements to offsite roads adjacent to the development. The District also financed portions of three public garages, water and sanitary sewer systems, stormwater management systems, landscaping, streetscaping, irrigation, a public plaza and miscellaneous public improvements, such as utility undergrounding and signalization for a 56 acre development located in the city of Miami, Miami-Dade County, Florida. The 56 gross acres include residential and commercial areas.

The infrastructure is a network of roadway, stormwater management, sanitary sewer, and water systems that will give access and service to the industrial and commercial buildings within the development.

Estimated Cost: \$ 77,535,000



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a. (1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION (City and State) 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b. (1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c. (1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d. (1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e. (1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
f. (1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 6		
21. TITLE AND LOCATION <i>(City and State)</i> Landmark at Doral Community Development District (City of Doral, Miami-Dade County, FL)	22. YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> </table>		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>			

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Landmark at Doral CDD	b. POINT OF CONTACT NAME Craig Wrathell, Wrathell, Hunt & Associates	c. POINT OF CONTACT TELEPHONE NUMBER (561) 571-0010
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Landmark at Doral Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Landmark at Doral, a 118 acre mixed use development located in the City of Doral, Miami-Dade County, Florida. The development offers residential, retail, office and industrial uses.

The infrastructure is a network of roadway, parking garage, drainage, water, sanitary sewer systems and outdoor recreational areas that will give access and service to 1,100 residential units, 94,700 SF of retail space, 93,346 SF of office and 180,000 SF of flex office space.

Estimated Cost: \$ 75,000,000

District Engineer currently overseeing the development of the infrastructure (2005 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT
(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

7

21. TITLE AND LOCATION *(City and State)*

Two Lakes Community Development District
 (City of Hialeah, Miami-Dade County, FL)

22. YEAR COMPLETED

PROFESSIONAL SERVICES

CONSTRUCTION *(If applicable)*

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Two Lakes CDD

b. POINT OF CONTACT NAME

Armando Silva, SDS Inc.

c. POINT OF CONTACT TELEPHONE NUMBER

(561) 630-4922

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Two Lakes Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Two Lakes, a 221.58 acre residential development located in the City of Hialeah, Miami-Dade County, Florida.

The infrastructure is a network of roadway, drainage, water and sanitary sewer systems that will give access and service to 396 single family homes and 1,273 townhomes and villas.

Estimated Cost: \$ 66,541,617

District Engineer currently overseeing the development of the infrastructure (2016 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 8				
21. TITLE AND LOCATION (City and State) Beacon Lakes Community Development District (Miami-Dade County, FL)		22. YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION (If applicable)</td> </tr> <tr> <td></td> <td style="text-align: center;">2019</td> </tr> </table>	PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)		2019
PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)					
	2019					

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Beacon Lakes CDD	b. POINT OF CONTACT NAME Ken Cassell, Inframark	c. POINT OF CONTACT TELEPHONE NUMBER (954) 753-5841
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

The Beacon Lakes Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure for a 522 acre development located in Northwest Miami-Dade County, Florida. The infrastructure is a network of roadway, stormwater management, sanitary sewer, and water systems that will give access and service to the industrial and commercial area.

Estimated Cost: \$ 63,000,000

District Engineer currently overseeing the development of the infrastructure (2002 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION (City and State) 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 9		
21. TITLE AND LOCATION <i>(City and State)</i> Centre Lake Community Development District (Town of Miami Lakes, Miami-Dade County, FL)		22. YEAR COMPLETED <table border="1"> <tr> <td>PROFESSIONAL SERVICES</td> <td>CONSTRUCTION <i>(If applicable)</i></td> </tr> </table>	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>			

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Centre Lake CDD	b. POINT OF CONTACT NAME Luis Hernandez, GMS-SF, LLC	c. POINT OF CONTACT TELEPHONE NUMBER (954) 721-8681
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Centre Lake Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure at Centre Lake, a 142.67 acre residential development located in the Town of Miami Lakes, Miami-Dade County, Florida.

The infrastructure is a network of roadway, drainage, water and sanitary sewer systems that will give access and service to 256 single family units and 226 townhomes.

Estimated Cost: \$ 48,433,917

District Engineer currently overseeing the development of the infrastructure (2015 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> 8935 NW 35 Lane, Suite 101 Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER 10
21. TITLE AND LOCATION <i>(City and State)</i> Silver Palms West Community Development District Miami-Dade County, FL		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Silver Palms West CDD	b. POINT OF CONTACT NAME Luis Hernandez, GMS SFL	c. POINT OF CONTACT TELEPHONE NUMBER (954) 721-8681
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(Include scope, size, and cost)*

The Silver Palms West Community Development District was created for the purpose of financing and managing the acquisition, construction and maintenance of the infrastructure of Silver Palms West, a 79.27 acre residential development located in Miami-Dade County, Florida.

The infrastructure is a network of roadway, stormwater management, water and sanitary sewer systems that will give access and service to 253 villas, 217 townhome units, and 183 single family units.

Estimated Cost: \$ 24,483,225.

District Engineer currently overseeing the development of the infrastructure (2021 to present).



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alvarez Engineers, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Doral, Florida	(3) ROLE CDD District Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

26. NAMES OF KEY PERSONNEL (From Section E, Block 12)	27. ROLE IN THIS CONTRACT (From Section E, Block 13)	28. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)									
		1	2	3	4	5	6	7	8	9	10
Juan R. Alvarez, P.E.	District Engineer	X	X	X	X	X	X	X	X	X	X
Raul Alessandri, P.E.	Senior Civil Engineer					X					
Reynaldo Chinaea, P.E.	Senior Civil Engineer	X	X	X	X	X	X	X	X	X	X
Ramon Tesone, P.E., PTOE	Senior Civil Engineer	X	X	X	X	X	X	X	X	X	X
Alejandro Aleman, P.E.	Civil Engineer	X	X	X	X	X	X	X	X	X	X
Angel Camacho, E.I.	Electrical Engineer	X	X	X	X	X	X	X	X	X	X
Maria Tovar-Altimari, E.I.	Civil Engineer										
Katherine Ramirez, E.I.	Engineer	X	X	X	X	X	X	X	X	X	X
Samara Cheda	Senior Designer										
Claudine Elie Harvey	Senior Administrative Assistant	X	X	X	X	X	X	X	X	X	X

29. EXAMPLE PROJECTS KEY

NUMBER	TITLE OF EXAMPLE PROJECT (From Section F)	NUMBER	TITLE OF EXAMPLE PROJECT (From Section F)
1	Grand Bay at Doral CDD	6	Landmark at Doral CDD
2	Fontainebleau Lakes CDD	7	Two Lakes CDD
3	Lakes by the Bay South CDD	8	Beacon Lakes CDD
4	Downtown Doral South CDD	9	Centre Lake CDD
5	Midtown Miami CDD	10	Silver Palms West CDD

H. ADDITIONAL INFORMATION

30. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE AGENCY. ATTACH ADDITIONAL SHEETS AS NEEDED.

Alvarez Engineers, Inc. is a Civil Engineering Consulting Firm specializing in Land Development, Highway Design, Drainage, Stormwater Management, Environmental Permits, Signing & Pavement Markings, Signalization, and Lighting.

Established in 1995 by Juan R. Alvarez, P.E., Alvarez Engineers is a Florida corporation organized in Miami-Dade, Florida with offices in the City of Doral. We pride ourselves in being highly qualified, efficient, flexible and with a focus on teamwork. Since our inception we have experienced continued success with state and local government agencies and private sector businesses covering well over 100,000 acres of land. Alvarez Engineers has built strong professional relationships through a company-wide commitment to excellence, professional integrity and focus on our clients' needs.

Since 1998 our firm has been Engineering Consultant to over 80 Community Development Districts in Miami-Dade County which have issued over than \$1.7 Billion in bonds for financing public infrastructure to serve over 60,000 homes.

We are able to engage and complete major projects due to the high level of preparation of our staff, its diligence, work discipline, and most importantly, its capacity to work with other firms by paying special attention to interpersonal relationships with co-workers and members of the team.

Areas of Expertise:

- (1) Site Development and Parking Lot Design
- (2) Water Distribution and Sanitary Sewage Collection
- (3) Minor and Major Highway Design
- (4) Roadway Signing, Pavement Marking and Channelization
- (5) Roadway Lighting
- (6) Roadway Signalization
- (7) General Civil Engineering for planning and conceptual studies, permitting and construction administration

Insurance:

Alvarez Engineers' current General Liability insurance is at \$2,000,000 and current Professional Liability insurance is at \$2,000,000.

Business Ethics:

Alvarez Engineers adheres to the highest standards of business ethics and has never been the subject of a judicial investigation.

I. AUTHORIZED REPRESENTATIVE*The foregoing is a statement of facts.*

31. SIGNATURE DocuSigned by:  04E21FDB6EED4E0...	32. DATE 7/30/2024
33. NAME AND TITLE Juan R. Alvarez, P.E., President	

State of Florida

Minority Business Certification

Alvarez Engineers, Inc.

Is certified under the provisions of
287 and 295.187, Florida Statutes, for a period from:

04/28/2023

to

04/28/2025



J. Todd Inman

Florida Department of Management Services

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

11D

Parker Pointe Community Development District
Request for Qualifications – District Engineering Services

Competitive Selection Criteria

	Ability and Adequacy of Professional Personnel	Consultant’s Past Performance	Geographic Location	Willingness to Meet Time and Budget Requirements	Certified Minority Business Enterprise	Recent, Current and Projected Workloads	Volume of Work Previously Awarded to Consultant by District	TOTAL SCORE
	<i>weight factor</i>	25	25	20	15	5	5	100
	NAME OF RESPONDENT							
1	Alvarez Engineers, Inc.							

Board Member’s Signature

Date

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

13A

MIAMI TODAY

2000 S. Dixie Highway, Suite 105A, Miami, FL 33133 (305) 358-2663

Published Weekly
Miami, Miami-Dade County, Florida
STATE OF FLORIDA
COUNTY OF MIAMI DADE:

Before the undersigned authority personally appeared:
Steve Rosenberg

Who on oath says that he/she is:

Advertising Sales Consultant

of Miami Today, a weekly newspaper published at
Miami in Miami-Dade County, Florida; that the
attached copy of a notice of publication:

PUBLIC NOTICE

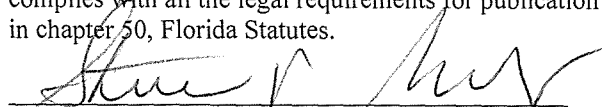
**Parker Pointe Community Development District
Request For Proposals For Annual Audit Services**

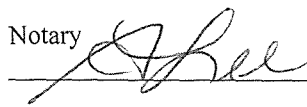
Was published in said newspaper in the issue(s) of:

7/25/24

Affidavit further says that the said Miami Today is a Newspaper published at Miami, in the said Miami-Dade County, Florida and that the said newspaper has heretofore been continuously published in Miami-Dade County, Florida each week and has been entered as second-class mail matter at the post office in Miami, in the said Miami-Dade County, Florida for a period of one year preceding the first publication of the attached copy of advertisement; and affiant further says that he/she has neither paid nor promised any person, firm or corporation any discount, rebate or commission or refund for the purpose of securing this advertisement for publication in the said newspaper.

Affiant further says that the website or newspaper complies with all the legal requirements for publication in chapter 50, Florida Statutes.


Steve Rosenberg, Advertising Sales Consultant

Notary 

Sworn to and subscribed before me this

25th day of July 2024

Public Notice

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES

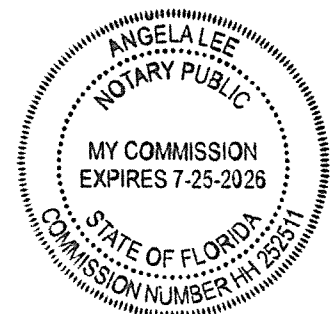
The Parker Pointe Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2024, with an option for annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, Florida Statutes, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in the City of Homestead, Miami Dade County, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2024, be completed no later than June 30, 2025.

The auditing entity submitting a proposal must be duly licensed under Chapter 473, Florida Statutes, and be qualified to conduct audits in accordance with "Government Auditing Standards," as adopted by the Florida Board of Accountancy. Audits shall be conducted in accordance with Florida Law and particularly Section 218.39, Florida Statutes, and the rules of the Florida Auditor General.

Proposal packages, which include evaluation criteria and instructions to proposers, are available from the District Manager at the address and telephone number listed below.

Proposers must provide one (1) electronic and one (1) unbound copy of their proposal to the offices of the District Manager, located at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431, ph: (877) 276-0889 ("District Manager"), in an envelope marked on the outside "Auditing Services, Parker Pointe Community Development District." Proposals must be received by 12:00 p.m. on August 2, 2024, at the office of the District Manager. Please direct all questions regarding this Notice to the District Manager.

Publication date: 7/25/24



PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

13B

**PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS FOR ANNUAL AUDIT SERVICES**

The Parker Pointe Community Development District hereby requests proposals for annual financial auditing services. The proposal must provide for the auditing of the District's financial records for the fiscal year ending September 30, 2024, with an option for annual renewals, subject to mutual agreement by both parties. The District is a local unit of special-purpose government created under Chapter 190, *Florida Statutes*, for the purpose of financing, constructing, and maintaining public infrastructure. The District is located in the City of Homestead, Miami Dade County, Florida. The final contract will require that, among other things, the audit for the fiscal year ending September 30, 2024, be completed no later than June 30, 2025.

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District Manager

Run date: must be published in at least one newspaper of general circulation in the District and the county in which the District is located. The public announcement must allow for at least 7 days for the submission of proposals.

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT

REQUEST FOR PROPOSALS

District Auditing Services for Fiscal Year 2024

Miami Dade County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than August 2, 2024 at 12:00 p.m., at the offices of District Manager, located at Wrathell, Hunt and Associates, LLC, 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431. Proposals will be publicly opened at that time.

SECTION 2. FAMILIARITY WITH THE LAW. By submitting a proposal, the Proposer is assumed to be familiar with all federal, state, and local laws, ordinances, rules and regulations that in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility to perform the work covered by the proposal in compliance with all such laws, ordinances and regulations.

SECTION 3. QUALIFICATIONS OF PROPOSER. The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience and licensing to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared to complete the work to the satisfaction of the District.

SECTION 4. SUBMISSION OF ONLY ONE PROPOSAL. Proposers shall be disqualified and their proposals rejected if the District has reason to believe that collusion may exist among the Proposers, the Proposer has defaulted on any previous contract or is in arrears on any previous or existing contract, or for failure to demonstrate proper licensure and business organization.

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic and one (1) unbound copy of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – Parker Pointe Community Development District" on the face of it. **Please include pricing for each additional bond issuance.**

SECTION 6. MODIFICATION AND WITHDRAWAL. Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. No proposal may be withdrawn after opening for a period of ninety (90) days.

SECTION 7. PROPOSAL DOCUMENTS. The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions (“**Proposal Documents**”).

SECTION 8. PROPOSAL. In making its proposal, each Proposer represents that it has read and understands the Proposal Documents and that the proposal is made in accordance therewith.

SECTION 9. BASIS OF AWARD/RIGHT TO REJECT. The District reserves the right to reject any and all proposals, make modifications to the work, and waive any informalities or irregularities in proposals as it is deemed in the best interests of the District.

SECTION 10. CONTRACT AWARD. Within fourteen (14) days of receipt of the Notice of Award from the District, the Proposer shall enter into and execute a Contract (engagement letter) with the District.

SECTION 11. LIMITATION OF LIABILITY. Nothing herein shall be construed as or constitute a waiver of the District’s limited waiver of liability contained in Section 768.28, *Florida Statutes*, or any other statute or law.

SECTION 12. MISCELLANEOUS. All proposals shall include the following information in addition to any other requirements of the proposal documents.

- A. List the position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.
- B. Describe proposed staffing levels, including resumes with applicable certifications.
- C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.
- D. The lump sum cost of the provision of the services under the proposal, plus the lump sum cost of four (4) annual renewals.

SECTION 13. PROTESTS. In accordance with the District’s Rules of Procedure, any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) calendar hours (excluding Saturday, Sunday, and state holidays) after the receipt of the Proposal Documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be

filed within seven (7) calendar days (including Saturday, Sunday, and state holidays) after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to the aforesaid Proposal Documents.

SECTION 14. EVALUATION OF PROPOSALS. The criteria to be used in the evaluation of proposals are presented in the Evaluation Criteria Sheet, contained within the Proposal Documents.

1. Ability of Personnel. (20 Points)

2. Proposer's Experience. (20 Points)

3. *Understanding of Scope of Work.* (20 Points)

4. Ability to Furnish the Required Services. (20 Points)

5. Price. (20 Points)***

Total (100 Points)

***Alternatively, the Board may choose to evaluate firms without considering price, in which case the remaining categories would be assigned 25 points each.

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

13C



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Proposal to Provide Financial Auditing Services:

PARKER POINTE

Community Development District

Proposal Due: August 2, 2024
12:00PM

Submitted to:

Parker Pointe
Community Development District
c/o District Manager
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

Submitted by:

Antonio J. Grau, Partner
Grau & Associates
951 Yamato Road, Suite 280
Boca Raton, Florida 33431

Tel (561) 994-9299
(800) 229-4728

Fax (561) 994-5823

tgrau@graucpa.com

www.graucpa.com



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

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Grau & Associates

CERTIFIED PUBLIC ACCOUNTANTS

August 2, 2024

Parker Pointe Community Development District
c/o District Manager
2300 Glades Road, Suite 410W
Boca Raton, Florida 33431

Re: Request for Proposal for Professional Auditing Services for the fiscal year ended September 30, 2024, with an option for four additional annual renewals.

Grau & Associates (Grau) welcomes the opportunity to respond to the Parker Pointe Community Development District's (the "District") Request for Proposal (RFP), and we look forward to working with you on your audit. We are an energetic and robust team of knowledgeable professionals and are a recognized leader of providing services to Community Development Districts. As one of Florida's few firms to primarily focus on government, we are especially equipped to provide you an effective and efficient audit.

Special district audits are at the core of our practice: **we have a total of 360 clients, 329 or 91% of which are special districts.** We know the specifics of the professional services and work products needed to meet your RFP requirements like no other firm. With this level of experience, we are able to increase efficiency, to provide immediate and continued savings, and to minimize disturbances to client operations.

Why Grau & Associates:

Knowledgeable Audit Team

Grau is proud that the personnel we assign to your audit are some of the most seasoned auditors in the field. Our staff performs governmental engagements year round. When not working on your audit, your team is refining their audit approach for next year's audit. Our engagement partners have decades of experience and take a hands-on approach to our assignments, which all ensures a smoother process for you.

Servicing your Individual Needs

Our clients enjoy personalized service designed to satisfy their unique needs and requirements. Throughout the process of our audit, you will find that we welcome working with you to resolve any issues as swiftly and easily as possible. In addition, due to Grau's very low turnover rate for our industry, you also won't have to worry about retraining your auditors from year to year.

Developing Relationships

We strive to foster mutually beneficial relationships with our clients. We stay in touch year round, updating, collaborating and assisting you in implementing new legislation, rules and standards that affect your organization. We are also available as a sounding board and assist with technical questions.

Maintaining an Impeccable Reputation

We have never been involved in any litigation, proceeding or received any disciplinary action. Additionally, we have never been charged with, or convicted of, a public entity crime of any sort. We are financially stable and have never been involved in any bankruptcy proceedings.

Complying With Standards

Our audit will follow the Auditing Standards of the AICPA, Generally Accepted Government Auditing Standards, issued by the Comptroller General of the United States, and the Rules of the Auditor General of the State of Florida, and any other applicable federal, state and local regulations. We will deliver our reports in accordance with your requirements.

This proposal is a firm and irrevocable offer for 90 days. We certify this proposal is made without previous understanding, agreement or connection either with any previous firms or corporations offering a proposal for the same items. We also certify our proposal is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action, and was prepared in good faith. Only the person(s), company or parties interested in the project as principals are named in the proposal. Grau has no existing or potential conflicts and anticipates no conflicts during the engagement. Our Federal I.D. number is 20-2067322.

We would be happy to answer any questions or to provide any additional information. We are genuinely excited about the prospect of serving you and establishing a long-term relationship. Please do not hesitate to call or email either of our Partners, Antonio J. Grau, CPA (tgrau@graucpa.com) or David Caplivski, CPA (dcaplivski@graucpa.com) at 561.994.9299. We thank you for considering our firm's qualifications and experience.

Very truly yours,
Grau & Associates



Antonio J. Grau

Firm Qualifications



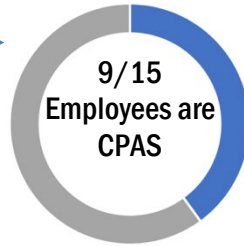
Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Grau's Focus and Experience

Our Team

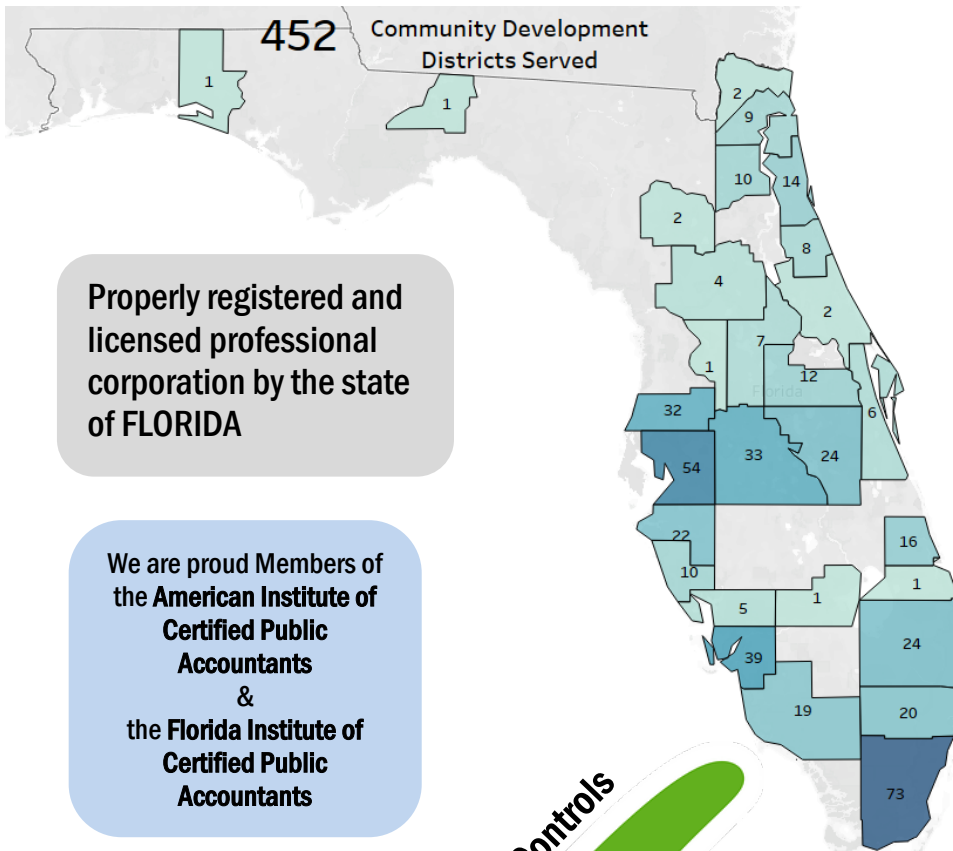


3 Partners
11 Professional Staff
2 Administrative Professionals



2005

Year founded



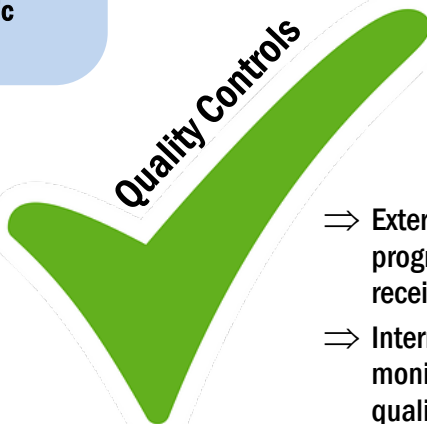
Properly registered and licensed professional corporation by the state of FLORIDA

We are proud Members of the **American Institute of Certified Public Accountants** & the **Florida Institute of Certified Public Accountants**

Services Provided



Quality Controls



- ⇒ External quality review program: consistently receives a pass
- ⇒ Internal: ongoing monitoring to maintain quality



AICPA | FICPA | GFOA | FASD | FGFOA

See next page for report and certificate

March 17, 2023

Antonio Grau
Grau & Associates
951 Yamato Rd Ste 280
Boca Raton, FL 33431-1809

Dear Antonio Grau:

It is my pleasure to notify you that on March 16, 2023, the Florida Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is December 31, 2025. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,

FICPA Peer Review Committee

Peer Review Team
FICPA Peer Review Committee

850.224.2727, x5957

cc: Daniel Hevia, Racquel McIntosh

Firm Number: 900004390114

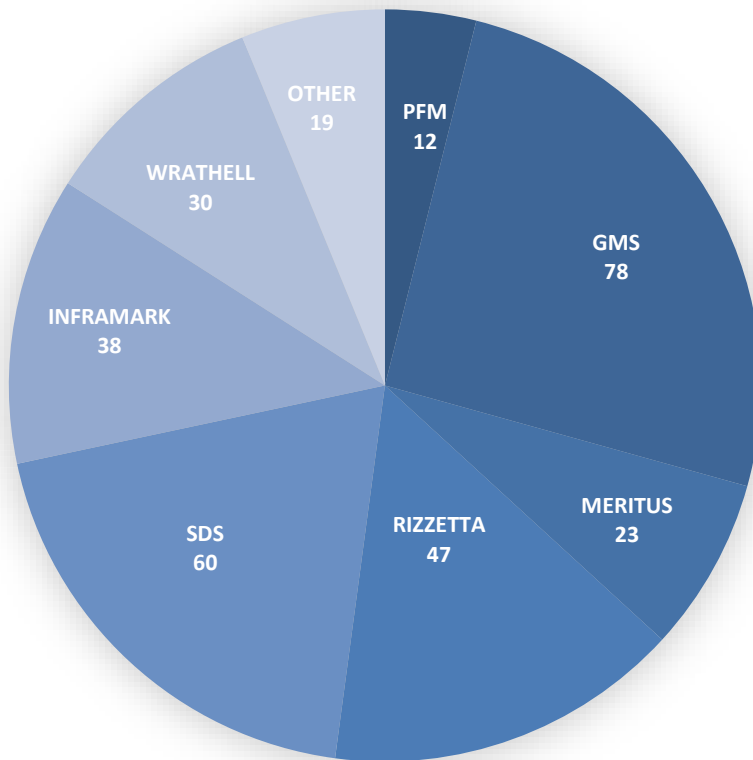
Review Number: 594791

Firm & Staff Experience



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

GRAU AND ASSOCIATES COMMUNITY DEVELOPMENT DISTRICT EXPERIENCE BY MANAGEMENT COMPANY



Profile Briefs:

Antonio J GRAU, CPA (Partner)

Years Performing Audits: 35+

CPE (last 2 years):

Government

Accounting, Auditing:

40 hours; Accounting,

Auditing and Other:

53 hours

Professional

Memberships: AICPA,

FICPA, FGFOA, GFOA

David Caplivski, CPA (Partner)

Years Performing Audits: 13+

CPE (last 2 years):

Government

Accounting, Auditing:

24 hours; Accounting,

Auditing and Other:

64 hours

Professional

Memberships: AICPA,

FICPA, FGFOA, FASD

"Here at Grau & Associates, staying up to date with the current technological landscape is one of our top priorities. Not only does it provide a more positive experience for our clients, but it also allows us to perform a more effective and efficient audit. With the every changing technology available and utilized by our clients, we are constantly innovating our audit process."

- Tony Grau

"Quality audits and exceptional client service are at the heart of every decision we make. Our clients trust us to deliver a quality audit, adhering to high standards and assisting them with improvements for their organization."

-David Caplivski

YOUR ENGAGEMENT TEAM

Grau's client-specific engagement team is meticulously organized in order to meet the unique needs of each client. Constant communication within our solution team allows for continuity of staff and audit team.

The Certified Information Technology Professional (CITP) Partner will bring a unique blend of IT expertise and understanding of accounting principles to the financial statement audit of the District.

An advisory consultant will be available as a sounding board to advise in those areas where problems are encountered.



The assigned personnel will work closely with the partner and the District to ensure that the financial statements and all other reports are prepared in accordance with professional standards and firm policy. Responsibilities will include planning the audit; communicating with the client and the partners the progress of the audit; and determining that financial statements and all reports issued by the firm are accurate, complete and are prepared in accordance with professional standards and firm policy.

The Engagement Partner will participate extensively during the various stages of the engagement and has direct responsibility for engagement policy, direction, supervision, quality control, security, confidentiality of information of the engagement and communication with client personnel. The engagement partner will also be involved directing the development of the overall audit approach and plan; performing an overriding review of work papers and ascertain client satisfaction.



Antonio 'Tony' J. Grau, CPA

Partner

Contact: tgrau@graucpa.com | (561) 939-6672

Experience

For over 30 years, Tony has been providing audit, accounting and consulting services to the firm's governmental, non-profit, employee benefit, overhead and arbitrage clients. He provides guidance to clients regarding complex accounting issues, internal controls and operations.

As a member of the Government Finance Officers Association Special Review Committee, Tony participated in the review process for awarding the GFOA Certificate of Achievement in Financial Reporting. Tony was also the review team leader for the Quality Review of the Office of Management Audits of School Board of Miami-Dade County. Tony received the AICPA advanced level certificate for governmental single audits.

Education

University of South Florida (1983)
Bachelor of Arts
Business Administration

Clients Served (partial list)

(>300) Various Special Districts, including:

Bayside Improvement Community Development District	St. Lucie West Services District
Dunes Community Development District	Ave Maria Stewardship Community District
Fishhawk Community Development District (I, II, IV)	Rivers Edge II Community Development District
Grand Bay at Doral Community Development District	Bartram Park Community Development District
Heritage Harbor North Community Development District	Bay Laurel Center Community Development District
Boca Raton Airport Authority	
Greater Naples Fire Rescue District	
Key Largo Wastewater Treatment District	
Lake Worth Drainage District	
South Indian River Water Control	

Professional Associations/Memberships

American Institute of Certified Public Accountants	Florida Government Finance Officers Association
Florida Institute of Certified Public Accountants	Government Finance Officers Association Member
City of Boca Raton Financial Advisory Board Member	

Professional Education (over the last two years)

<u>Course</u>	<u>Hours</u>
Government Accounting and Auditing	40
Accounting, Auditing and Other	<u>53</u>
Total Hours	<u>93</u> (includes of 4 hours of Ethics CPE)



David Caplivski, CPA/CITP, Partner
Contact : dcaplivski@graucpa.com / 561-939-6676

Experience

Grau & Associates	Partner	2021-Present
Grau & Associates	Manager	2014-2020
Grau & Associates	Senior Auditor	2013-2014
Grau & Associates	Staff Auditor	2010-2013

Education

Florida Atlantic University (2009)
 Master of Accounting
 Nova Southeastern University (2002)
 Bachelor of Science
 Environmental Studies

Certifications and Certificates

Certified Public Accountant (2011)
 AICPA Certified Information Technology Professional (2018)
 AICPA Accreditation COSO Internal Control Certificate (2022)

Clients Served (partial list)

(>300) Various Special Districts	Hispanic Human Resource Council
Aid to Victims of Domestic Abuse	Loxahatchee Groves Water Control District
Boca Raton Airport Authority	Old Plantation Water Control District
Broward Education Foundation	Pinetree Water Control District
CareerSource Brevard	San Carlos Park Fire & Rescue Retirement Plan
CareerSource Central Florida 403 (b) Plan	South Indian River Water Control District
City of Lauderdale GERS	South Trail Fire Protection & Rescue District
City of Parkland Police Pension Fund	Town of Haverhill
City of Sunrise GERS	Town of Hypoluxo
Coquina Water Control District	Town of Hillsboro Beach
Central County Water Control District	Town of Lantana
City of Miami (program specific audits)	Town of Lauderdale By-The-Sea Volunteer Fire Pension
City of West Park	Town of Pembroke Park
Coquina Water Control District	Village of Wellington
East Central Regional Wastewater Treatment Fac.	Village of Golf
East Naples Fire Control & Rescue District	

Professional Education (over the last two years)

<u>Course</u>	<u>Hours</u>
Government Accounting and Auditing	24
Accounting, Auditing and Other	64
Total Hours	88 (includes 4 hours of Ethics CPE)

Professional Associations

Member, American Institute of Certified Public Accountants
Member, Florida Institute of Certified Public Accountants
Member, Florida Government Finance Officers Association
Member, Florida Association of Special Districts

References



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

We have included three references of government engagements that require compliance with laws and regulations, follow fund accounting, and have financing requirements, which we believe are similar to the District.

Dunes Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 1998
Client Contact	Darrin Mossing, Finance Director 475 W. Town Place, Suite 114 St. Augustine, Florida 32092 904-940-5850

Two Creeks Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 2007
Client Contact	William Rizzetta, President 3434 Colwell Avenue, Suite 200 Tampa, Florida 33614 813-933-5571

Journey's End Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 2004
Client Contact	Todd Wodraska, Vice President 2501 A Burns Road Palm Beach Gardens, Florida 33410 561-630-4922

Specific Audit Approach



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

AUDIT APPROACH

Grau's Understanding of Work Product / Scope of Services:

We recognize the District is an important entity and we are confident our firm is eminently qualified to meet the challenges of this engagement and deliver quality audit services. ***You would be a valued client of our firm and we pledge to commit all firm resources to provide the level and quality of services (as described below) which not only meet the requirements set forth in the RFP but will exceed those expectations.*** Grau & Associates fully understands the scope of professional services and work products requested. Our audit will follow the Auditing Standards of the AICPA, *Generally Accepted Government Auditing Standards*, issued by the Comptroller General of the United States, and the Rules of the Auditor General of the State of Florida and any other applicable Federal, State or Local regulations. **We will deliver our reports in accordance with your requirements.**

Proposed segmentation of the engagement

Our approach to the audit engagement is a risk-based approach which integrates the best of traditional auditing techniques and a total systems concept to enable the team to conduct a more efficient and effective audit. The audit will be conducted in three phases, which are as follows:



Phase I - Preliminary Planning

A thorough understanding of your organization, service objectives and operating environment is essential for the development of an audit plan and for an efficient, cost-effective audit. During this phase, we will meet with appropriate personnel to obtain and document our understanding of your operations and service objectives and, at the same time, give you the opportunity to express your expectations with respect to the services that we will provide. Our work effort will be coordinated so that there will be minimal disruption to your staff.

During this phase we will perform the following activities:

- » Review the regulatory, statutory and compliance requirements. This will include a review of applicable federal and state statutes, resolutions, bond documents, contracts, and other agreements;
- » Read minutes of meetings;
- » Review major sources of information such as budgets, organization charts, procedures, manuals, financial systems, and management information systems;
- » Obtain an understanding of fraud detection and prevention systems;
- » Obtain and document an understanding of internal control, including knowledge about the design of relevant policies, procedures, and records, and whether they have been placed in operation;
- » Assess risk and determine what controls we are to rely upon and what tests we are going to perform and perform test of controls;
- » Develop audit programs to incorporate the consideration of financial statement assertions, specific audit objectives, and appropriate audit procedures to achieve the specified objectives;
- » Discuss and resolve any accounting, auditing and reporting matters which have been identified.

Phase II – Execution of Audit Plan

The audit team will complete a major portion of transaction testing and audit requirements during this phase. The procedures performed during this period will enable us to identify any matter that may impact the completion of our work or require the attention of management. Tasks to be performed in Phase II include, but are not limited to the following:

- » Apply analytical procedures to further assist in the determination of the nature, timing, and extent of auditing procedures used to obtain evidential matter for specific account balances or classes of transactions;
- » Perform tests of account balances and transactions through sampling, vouching, confirmation and other analytical procedures; and
- » Perform tests of compliance.

Phase III - Completion and Delivery

In this phase of the audit, we will complete the tasks related to year-end balances and financial reporting. All reports will be reviewed with management before issuance, and the partners will be available to meet and discuss our report and address any questions. Tasks to be performed in Phase III include, but are not limited to the following:

- » Perform final analytical procedures;
- » Review information and make inquiries for subsequent events; and
- » Meeting with Management to discuss preparation of draft financial statements and any potential findings or recommendations.

You should expect more from your accounting firm than a signature in your annual financial report. Our concept of truly responsive professional service emphasizes taking an active interest in the issues of concern to our clients and serving as an effective resource in dealing with those issues. In following this approach, we not only audit financial information with hindsight but also consider the foresight you apply in managing operations.

Application of this approach in developing our management letter is particularly important given the increasing financial pressures and public scrutiny facing today's public officials. We will prepare the management letter at the completion of our final procedures.

In preparing this management letter, we will initially review any draft comments or recommendations with management. In addition, we will take necessary steps to ensure that matters are communicated to those charged with governance.

In addition to communicating any recommendations, we will also communicate the following, if any:

- » Significant audit adjustments;
- » Significant deficiencies or material weaknesses;
- » Disagreements with management; and
- » Difficulties encountered in performing the audit.

Our findings will contain a statement of condition describing the situation and the area that needs strengthening, what should be corrected and why. Our suggestions will withstand the basic tests of corrective action:

Is the recommendation cost effective?

Is the recommendation the simplest to effectuate in order to correct a problem?

Is the recommendation at the heart of the problem and not just correcting a symptomatic matter?

Is the corrective action taking into account why the deficiency occurred?

To assure full agreement with facts and circumstances, we will fully discuss each item with Management prior to the final exit conference. This policy means there will be no “surprises” in the management letter and fosters a professional, cooperative atmosphere.

Communications

We emphasize a continuous, year-round dialogue between the District and our management team. We regularly communicate through personal telephone calls and electronic mail throughout the audit and on a regular basis.

Our clients have the ability to transmit information to us on our secure client portal with the ability to assign different staff with separate log on and viewing capability. This further facilitates efficiency as all assigned users receive electronic mail notification as soon as new information has been posted into the portal.

Cost of Services



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Our proposed all-inclusive fees for the financial audit for the fiscal years ended September 30, 2024-2028 are as follows:

Year Ended September 30,	Fee
2024	\$3,800
2025	\$3,900
2026	\$4,000
2027	\$4,100
2028	<u>\$4,200</u>
TOTAL (2024-2028)	<u>\$20,000</u>

The above fees are based on the assumption that the District maintains its current level of operations. Should conditions change or additional Bonds are issued the fees would be adjusted accordingly upon approval from all parties concerned. If Bonds are issued the fee would increase by \$1,500. The fee for subsequent annual renewals would be agreed upon separately.

Supplemental Information



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

PARTIAL LIST OF CLIENTS

SPECIAL DISTRICTS	Governmental Audit	Single Audit	Utility Audit	Current Client	Year End
Boca Raton Airport Authority	✓	✓		✓	9/30
Captain's Key Dependent District	✓			✓	9/30
Central Broward Water Control District	✓			✓	9/30
Coquina Water Control District	✓			✓	9/30
East Central Regional Wastewater Treatment Facility	✓		✓		9/30
Florida Green Finance Authority	✓				9/30
Greater Boca Raton Beach and Park District	✓			✓	9/30
Greater Naples Fire Control and Rescue District	✓	✓		✓	9/30
Green Corridor P.A.C.E. District	✓			✓	9/30
Hobe-St. Lucie Conservancy District	✓			✓	9/30
Indian River Mosquito Control District	✓				9/30
Indian Trail Improvement District	✓			✓	9/30
Key Largo Wastewater Treatment District	✓	✓	✓	✓	9/30
Lake Asbury Municipal Service Benefit District	✓			✓	9/30
Lake Padgett Estates Independent District	✓			✓	9/30
Lake Worth Drainage District	✓			✓	9/30
Loxahatchee Groves Water Control District	✓				9/30
Old Plantation Control District	✓			✓	9/30
Pal Mar Water Control District	✓			✓	9/30
Pinellas Park Water Management District	✓			✓	9/30
Pine Tree Water Control District (Broward)	✓			✓	9/30
Pinetree Water Control District (Wellington)	✓				9/30
Port of The Islands Community Improvement District	✓		✓	✓	9/30
Ranger Drainage District	✓	✓		✓	9/30
Renaissance Improvement District	✓			✓	9/30
San Carlos Park Fire Protection and Rescue Service District	✓			✓	9/30
Sanibel Fire and Rescue District	✓			✓	9/30
South Central Regional Wastewater Treatment and Disposal Board	✓				9/30
South-Dade Venture Development District	✓			✓	9/30
South Indian River Water Control District	✓	✓		✓	9/30
South Trail Fire Protection & Rescue District	✓			✓	9/30
Spring Lake Improvement District	✓			✓	9/30
St. Lucie West Services District	✓		✓	✓	9/30
Sunrise Lakes Phase IV Recreation District	✓			✓	9/30
Sunshine Water Control District	✓			✓	9/30
Sunny Hills Units 12-15 Dependent District	✓			✓	9/30
West Villages Independent District	✓			✓	9/30
Various Community Development Districts (452)	✓			✓	9/30
TOTAL	490	5	4	484	

ADDITIONAL SERVICES

CONSULTING / MANAGEMENT ADVISORY SERVICES

Grau & Associates also provide a broad range of other management consulting services. Our expertise has been consistently utilized by Governmental and Non-Profit entities throughout Florida. Examples of engagements performed are as follows:

- Accounting systems
- Development of budgets
- Organizational structures
- Financing alternatives
- IT Auditing
- Fixed asset records
- Cost reimbursement
- Indirect cost allocation
- Grant administration and compliance

ARBITRAGE

The federal government has imposed complex rules to restrict the use of tax-exempt financing. Their principal purpose is to eliminate any significant arbitrage incentives in a tax-exempt issue. We have determined the applicability of these requirements and performed the rebate calculations for more than 150 bond issues, including both fixed and variable rate bonds.

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Current
Arbitrage
Calculations

We look forward to providing Parker Pointe Community Development District with our resources and experience to accomplish not only those minimum requirements set forth in your Request for Proposal, but to exceed those expectations!

**For even more information on Grau & Associates
please visit us on www.graucpa.com.**

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

13D

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT

AUDITOR EVALUATION MATRIX

RFP FOR ANNUAL AUDIT SERVICES	ABILITY OF PERSONNEL	PROPOSER'S EXPERIENCE	UNDERSTANDING OF SCOPE OF WORK	ABILITY TO FURNISH REQUIRED SERVICES	PRICE	TOTAL POINTS
PROPOSER	20 POINTS	20 POINTS	20 POINTS	20 POINTS	20 POINTS	100 POINTS
Grau & Associates						

NOTES:

Completed by: _____

Board Member's Signature

Date: _____

Printed Name of Board Member

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

16

Memorandum

To: Board of Supervisors

From: District Management

Date: August 16, 2024

RE: HB7013 - Special Districts Performance Measures and Standards Reporting

To enhance accountability and transparency, new regulations were established for all special districts, by the Florida Legislature, during their 2024 legislative session. Starting on October 1, 2024, or by the end of the first full fiscal year after its creation (whichever comes later), each special district must establish goals and objectives for each program and activity, as well as develop performance measures and standards to assess the achievement of these goals and objectives. Additionally, by December 1 each year (initial report due on December 1, 2025), each special district is required to publish an annual report on its website, detailing the goals and objectives achieved, the performance measures and standards used, and any goals or objectives that were not achieved.

District Management has identified the following key categories to focus on for Fiscal Year 2025 and develop statutorily compliant goals for each:

- Community Communication and Engagement
- Infrastructure and Facilities Maintenance
- Financial Transparency and Accountability

Additionally, special districts must provide an annual reporting form to share with the public that reflects whether the goals & objectives were met for the year. District Management has streamlined these requirements into a single document that meets both the statutory requirements for goal/objective setting and annual reporting.

The proposed goals/objectives and the annual reporting form are attached as exhibit A to this memo. District Management recommends that the Board of Supervisors adopt these goals and objectives to maintain compliance with HB7013 and further enhance their commitment to the accountability and transparency of the District.

Exhibit A: Goals, Objectives and Annual Reporting Form

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT
Performance Measures/Standards & Annual Reporting Form
October 1, 2024 – September 30, 2025

1. COMMUNITY COMMUNICATION AND ENGAGEMENT

Goal 1.1 Public Meetings Compliance

Objective: Hold at least two (2) regular Board of Supervisor meetings per year to conduct CDD related business and discuss community needs.

Measurement: Number of public board meetings held annually as evidenced by meeting minutes and legal advertisements.

Standard: A minimum of two (2) regular board meetings was held during the fiscal year.

Achieved: Yes ☐ No ☐

Goal 1.2 Notice of Meetings Compliance

Objective: Provide public notice of each meeting at least seven days in advance, as specified in Section 190.007(1), using at least two communication methods.

Measurement: Timeliness and method of meeting notices as evidenced by posting to CDD website, publishing in local newspaper and via electronic communication.

Standard: 100% of meetings were advertised with 7 days' notice per statute on at least two mediums (i.e., newspaper, CDD website, electronic communications).

Achieved: Yes ☐ No ☐

Goal 1.3 Access to Records Compliance

Objective: Ensure that meeting minutes and other public records are readily available and easily accessible to the public by completing monthly CDD website checks.

Measurement: Monthly website reviews will be completed to ensure meeting minutes and other public records are up to date as evidenced by District Management's records.

Standard: 100% of monthly website checks were completed by District Management.

Achieved: Yes ☐ No ☐

2. **INFRASTRUCTURE AND FACILITIES MAINTENANCE**

Goal 2.1 District Infrastructure and Facilities Inspections

Objective: District Engineer will conduct an annual inspection of the District's infrastructure and related systems.

Measurement: A minimum of one (1) inspection completed per year as evidenced by district engineer's report related to district's infrastructure and related systems.

Standard: Minimum of one (1) inspection was completed in the Fiscal Year by the district's engineer.

Achieved: Yes ☐ No ☐

3. **FINANCIAL TRANSPARENCY AND ACCOUNTABILITY**

Goal 3.1 Annual Budget Preparation

Objective: Prepare and approve the annual proposed budget by June 15 and final budget was adopted by September 30 each year.

Measurement: Proposed budget was approved by the Board before June 15 and final budget was adopted by September 30 as evidenced by meeting minutes and budget documents listed on CDD website and/or within district records.

Standard: 100% of budget approval and adoption were completed by the statutory deadlines and posted to the CDD website.

Achieved: Yes ☐ No ☐

Goal 3.2 Financial Reports

Objective: Publish to the CDD website the most recent versions of the following documents: annual audit, current fiscal year budget with any amendments, and most recent financials within the latest agenda package.

Measurement: Annual audit, previous years' budgets, and financials are accessible to the public as evidenced by corresponding documents on the CDD website.

Standard: CDD website contains 100% of the following information: most recent annual audit, most recently adopted/amended fiscal year budget, and most recent agenda package with updated financials.

Achieved: Yes ☐ No ☐

Goal 3.3 Annual Financial Audit

Objective: Conduct an annual independent financial audit per statutory requirements and publish the results to the CDD website for public inspection and transmit said results to the State of Florida.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing board approval and annual audit is available on the CDD website and transmitted to the State of Florida.

Standard: Audit was completed by an independent auditing firm per statutory requirements and results were posted to the CDD website and transmitted to the State of Florida.

Achieved: Yes ☐ No ☐

District Manager

Chair/Vice Chair, Board of Supervisors

Print Name

Print Name

Date

Date

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

17

EMMA® Filing Assistance Software as a Service License Agreement

This EMMA Filing Assistance Software as a Service License Agreement (this "**Agreement**") is entered into by and between the **Parker Pointe Community Development District** (the "**District**") on behalf of itself, its Dissemination Agent and all other Obligated Persons as defined in the District's outstanding Continuing Disclosure Agreements (collectively, the "**Licensee**"), and Disclosure Technology Services, LLC, a Delaware limited liability company ("**DTS**" or the "**Licensor**"). This Agreement shall be effective as of last day executed below ("**Effective Date**").

NOW, THEREFORE, for good and adequate consideration, the sufficiency of which is hereby acknowledged, the parties have agreed as follows:

The District is, or may in the future be, a party to one or more Continuing Disclosure Agreements (the "**CDAs**") in connection with the issuance of bonds or other debt obligations. Pursuant to the CDAs, the District and the other Obligated Persons named therein are, or will be, obligated to file certain Annual Reports, Quarterly Reports and Listed Event filings (as such terms are defined in the CDAs) electronically through the Municipal Securities Rulemaking Board's Electronic Municipal Market Access ("**EMMA**") system website within the time periods specified in the CDAs.

Subject to the payment of the fees provided for in "Exhibit A: Fee Schedule" attached hereto and the terms and conditions provided for in the "EMMA® Filing Assistance Software End User License Agreement" located at , both of which are hereby incorporated by reference into this Agreement, the Licensor hereby (i) grants to Licensee a non-exclusive, non-transferable, non-sublicensable, limited license and right to access and use the DTS Portal ("**Portal**") for the purposes provided for herein. The Portal is configured to provide annual and quarterly notices of reporting deadlines prior to the applicable Annual Filing Date(s) and Quarterly Filing Date(s) set forth in the CDAs (the "**Services**").

As part of the notices provided by the Portal, links to access to the Portal will be made delivered to the District and other Obligated Persons annually and quarterly, as applicable, via email, which will allow for the District and other Obligated Persons to input the information required for the Annual Reports (excluding the Audited Financial Statements) and the Quarterly Reports under the CDAs, respectively, into a reportable format (collectively, the "**Formatted Information**"). Notwithstanding this provision or failure to provide such Formatted Information or any Services, the District, and its Dissemination Agent, if any, will remain responsible for filing the Formatted Information with EMMA on or before the deadlines provided for in the CDAs. The Portal shall not include any links for Listed Events as defined in the CDAs and all EMMA reporting obligations shall remain the sole obligations of the District and the Obligated Persons as set forth in the CDAs if and when a Listed Events report needs to be filed.

This Agreement shall commence on the Effective Date and continue through September 30 of the year in which this Agreement is executed, and thereafter, shall renew for additional one year terms (based on the District's fiscal year, which ends September 30) so long as the District is obligated under any CDAs. Either party may terminate this Agreement upon thirty days prior written notice to the other party hereto. Any fees paid prior to termination shall be considered earned and non-refundable and the Licensor may adjust the fees hereunder upon thirty days prior written notice to Licensee. Upon the termination of this Agreement, Licensee shall immediately discontinue use of the Portal. Licensee's obligations according to the provisions of this Agreement prior to termination shall survive termination of this Agreement. This Agreement is also subject to the terms set forth in **Exhibit B**.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date below written.

Parker Pointe Community Development District

By: 
Print: Michael Caputo
Title: Chairman
Date: 6/21/24

Disclosure Technology Services, LLC

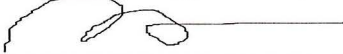
By: 
Print: Michael Klurman
Title: Vice President
Date: 06-03-2024

Exhibit A – Fee Schedule

Annual License Fee:

1. Year 1 - \$2,500 at Bond Closing to be paid from issuance cost budget.
2. Fiscal Year 2024-2025 and forward, \$2500 per annum.

Exhibit B – CDD Addendum

The following terms apply notwithstanding any other provision of the Agreement (including but not limited to any of the terms incorporated therein from other documents):

PUBLIC RECORDS. DTS understands and agrees that all documents of any kind provided to the District in connection with this Agreement may be public records, and, accordingly, DTS agrees to comply with all applicable provisions of Florida law in handling such records, including but not limited to section 119.0701, *Florida Statutes*. DTS acknowledges that the designated public records custodian for the District is the District's Manager ("**Public Records Custodian**"). Among other requirements and to the extent applicable by law, DTS shall 1) keep and maintain public records required by the District to perform the service; 2) upon request by the Public Records Custodian, provide the District with the requested public records or allow the records to be inspected or copied within a reasonable time period at a cost that does not exceed the cost provided in Chapter 119, *Florida Statutes*; 3) ensure that public records which are exempt or confidential, and exempt from public records disclosure requirements, are not disclosed except as authorized by law for the duration of the contract term and following the contract term if DTS does not transfer the records to the Public Records Custodian of the District; and 4) upon completion of the contract, transfer to the District, at no cost, all public records in DTS's possession or, alternatively, keep, maintain and meet all applicable requirements for retaining public records pursuant to Florida laws. When such public records are transferred by DTS, DTS shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the District in a format that is compatible with Microsoft Word or Adobe PDF formats.

IF THE DTS HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, *FLORIDA STATUTES*, TO THE DTS'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS, Wrathell Hunt & Associates, 2300 Glades Road, Ste #410W, Boca Raton, FL 33431; Attention: Craig Wrathell.

LIMITATIONS ON LIABILITY. Nothing in the Agreement shall be deemed as a waiver of immunity or limits of liability of the District beyond any statutory limited waiver of immunity or limits of liability which may have been adopted by the Florida Legislature in section 768.28, *Florida Statutes*, or other statute or law, and nothing in this Agreement shall inure to the benefit of any third party for the purpose of allowing any claim which would otherwise be barred under the Doctrine of Sovereign Immunity or by operation of law.

SCRUTINIZED COMPANIES. DTS certifies that it is not in violation of section 287.135, *Florida Statutes*, and is not prohibited from doing business with the District under Florida law, including but not limited to Scrutinized Companies with Activities in Sudan List or Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. If DTS is found to have submitted a false statement, has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or has been engaged in business operations in Cuba or Syria, or is now or in

the future on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel, the District may immediately terminate this Agreement.

E-VERIFY. DTS shall comply with and perform all applicable provisions of Section 448.095, *Florida Statutes*. Accordingly, to the extent required by Florida Statute, DTS shall register with and use the United States Department of Homeland Security's E-Verify system to verify the work authorization status of all newly hired employees and shall comply with all requirements of Section 448.095, *Florida Statutes*, as to the use of subcontractors. The District may terminate the Agreement immediately for cause if there is a good faith belief that the DTS has knowingly violated Section 448.091, *Florida Statutes*. By entering into this Agreement, the DTS represents that no public employer has terminated a contract with the DTS under Section 448.095(2)(c), *Florida Statutes*, within the year immediately preceding the date of this Agreement.

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

UNAUDITED
FINANCIAL
STATEMENTS

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
FINANCIAL STATEMENTS
UNAUDITED
JUNE 30, 2024**

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
BALANCE SHEET
GOVERNMENTAL FUNDS
JUNE 30, 2024**

	General Fund	Debt Service Fund	Total Governmental Funds
ASSETS			
Undeposited funds	\$ 33,727	\$ -	\$ 33,727
Due from Landowner	42,951	3,578	46,529
Due from general fund	-	5,993	5,993
Total assets	<u>76,678</u>	<u>9,571</u>	<u>86,249</u>
LIABILITIES AND FUND BALANCES			
Liabilities:			
Accounts payable	\$ 64,685	\$ 9,571	\$ 74,256
Due to Landowner	-	9,571	9,571
Due to debt service fund	5,993	-	5,993
Landowner advance	6,000	-	6,000
Total liabilities	<u>76,678</u>	<u>19,142</u>	<u>95,820</u>
DEFERRED INFLOWS OF RESOURCES			
Deferred receipts	36,951	-	36,951
Total deferred inflows of resources	<u>36,951</u>	<u>-</u>	<u>36,951</u>
Fund balances:			
Restricted for:			
Debt service	-	(9,571)	(9,571)
Unassigned	(36,951)	-	(36,951)
Total fund balances	<u>(36,951)</u>	<u>(9,571)</u>	<u>(46,522)</u>
Total liabilities, deferred inflows of resources and fund balances	<u>\$ 76,678</u>	<u>\$ 9,571</u>	<u>\$ 86,249</u>

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
GENERAL FUND
STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES
FOR THE PERIOD ENDED JUNE 30, 2024**

	Current Month	Year to Date	Budget	% of Budget
REVENUES				
Landowner contribution	\$ 23,252	\$ 27,733	\$ 297,598	9%
Total revenues	<u>23,252</u>	<u>27,733</u>	<u>297,598</u>	9%
EXPENDITURES				
Professional & administrative				
Management/accounting/recording	3,667	29,333	44,000	67%
Legal	501	5,727	25,000	23%
Engineering	-	-	2,000	0%
Dissemination agent*	-	-	583	0%
Telephone	17	133	200	67%
Postage	-	11	500	2%
Printing & binding	42	333	500	67%
Legal advertising	-	20,263	6,500	312%
Annual special district fee	-	-	175	0%
Insurance	-	-	5,500	0%
Contingencies/bank charges	-	202	750	27%
Website hosting & maintenance	-	-	1,680	0%
Website ADA compliance	-	210	210	100%
Total professional & administrative	<u>4,227</u>	<u>56,212</u>	<u>87,598</u>	64%
Field Operations				
Landscape maintenance	-	-	150,000	0%
Streetlighting	<u>2,300</u>	<u>6,900</u>	<u>60,000</u>	12%
Total field operations	<u>2,300</u>	<u>6,900</u>	<u>210,000</u>	3%
Total expenditures	<u>6,527</u>	<u>63,112</u>	<u>297,598</u>	21%
Excess/(deficiency) of revenues over/(under) expenditures	16,725	(35,379)	-	
Fund balances - beginning	(53,676)	(1,572)	-	
Fund balances - ending	<u>\$ (36,951)</u>	<u>\$ (36,951)</u>	<u>\$ -</u>	

*These items will be realized when bonds are issued

**PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT
STATEMENT OF REVENUES, EXPENDITURES
AND CHANGES IN FUND BALANCES
DEBT SERVICE FUND
FOR THE PERIOD ENDED JUNE 30, 2024**

	Current Month	Year to Date
REVENUES	<u>\$ -</u>	<u>\$ -</u>
Total revenues	<u>-</u>	<u>-</u>
EXPENDITURES		
Cost of issuance	<u>-</u>	<u>9,571</u>
Total expenditures	<u>-</u>	<u>9,571</u>
Excess/(deficiency) of revenues over/(under) expenditures	-	(9,571)
Fund balance - beginning	(9,571)	-
Fund balance - ending	<u><u>\$ (9,571)</u></u>	<u><u>\$ (9,571)</u></u>

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

MINUTES

DRAFT

**MINUTES OF MEETING
PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT**

The Board of Supervisors of the Parker Pointe Community Development District held a Regular Meeting on May 17, 2024 at 12:00 p.m., at the Office Park at California Club, 1031 Ives Dairy Road, Suite 228, Miami, Florida 33179.

Present at the meeting were:

Michael Caputo	Chair
Timothy Smith	Vice Chair
Jon Seifel	Assistant Secretary

Also present:

Daniel Rom (via telephone)	District Manager
Kristen Thomas	Wrathell, Hunt and Associates, LLC
Andrew Kantarzhi	Wrathell, Hunt and Associates, LLC
Jere Earlywine (via telephone)	District Counsel
William (Bill) Fife (via telephone)	Public

FIRST ORDER OF BUSINESS

Call to Order/Roll Call

Mr. Kantarzhi called the meeting to order at 12:27 p.m.

Supervisors Caputo, Smith and Seifel were present. Supervisor Frye was not present. One seat was vacant.

SECOND ORDER OF BUSINESS

Public Comments

No members of the public were present.

THIRD ORDER OF BUSINESS

Administration of Oath of Office to Supervisor William Fife (the following will be provided in a separate package)

As Mr. Fife was not present, the Oath of Office will be administered at or before the next meeting.

A. Required Ethics Training and Disclosure Filing

- **Sample Form 1 2023/Instructions**

B. Membership, Obligation and Responsibilities

C. Guide to Sunshine Amendment and Code of Ethics for Public Officers and Employees

D. Form 8B: Memorandum of Voting Conflict for County, Municipal and other Local Public Officers

FOURTH ORDER OF BUSINESS

**Consideration of Resolution 2024-35,
Electing and Removing Officers of the
District and Providing for an Effective Date**

This item was deferred.

FIFTH ORDER OF BUSINESS

**Consideration of Resolution 2024-36,
Approving a Proposed Budget for Fiscal
Year 2024/2025 and Setting a Public
Hearing Thereon Pursuant to Florida Law;
Addressing Transmittal, Posting and
Publication Requirements; Addressing
Severability; and Providing an Effective
Date**

Mr. Kantarzhi presented Resolution 2024-36. He reviewed the proposed Fiscal Year 2025 budget, highlighting any line item increases, decreases and adjustments, compared to the Fiscal Year 2024 budget, and explained the reasons for any changes.

Mr. Kantarzhi stated that the budget amount for the amenity that will come online is being finalized so a placeholder amount will be inserted.

The following change was made to the proposed Fiscal Year 2025 budget:

Field Operations: Add "Amenity" line item at \$100,000

On MOTION by Mr. Smith and seconded by Mr. Caputo, with all in favor, Resolution 2024-36, Approving a Proposed Budget for Fiscal Year 2024/2025, as amended, and Setting a Public Hearing Thereon Pursuant to Florida Law on August 16, 2024 at 12:00 p.m., at the Office Park at California Club, 1031 Ives Dairy Road, Suite 228, Miami, Florida 33179; Addressing Transmittal, Posting and Publication Requirements; Addressing Severability; and Providing an Effective Date, was adopted.

SIXTH ORDER OF BUSINESS

Consideration of Resolution 2024-37, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for Fiscal Year 2024/2025 and Providing for an Effective Date

Mr. Rom presented Resolution 2024-37.

On MOTION by Mr. Smith and seconded by Mr. Caputo, with all in favor, Resolution 2024-37, Designating Dates, Times and Locations for Regular Meetings of the Board of Supervisors of the District for Fiscal Year 2024/2025 and Providing for an Effective Date, was adopted.

SEVENTH ORDER OF BUSINESS

Consideration of United Land Services Common Area Landscape Maintenance & Irrigation Proposal

Mr. Kantarzhi presented the United Land Services Common Area Landscape Maintenance & Irrigation Proposal.

On MOTION by Mr. Smith and seconded by Mr. Caputo, with all in favor, the United Land Services Common Area Landscape Maintenance & Irrigation Proposal, was approved.

EIGHTH ORDER OF BUSINESS

Acceptance of Unaudited Financial Statements as of March 31, 2024

On MOTION by Mr. Smith and seconded by Mr. Caputo, with all in favor, the Unaudited Financial Statements as of March 31, 2024, were accepted.

NINTH ORDER OF BUSINESS**Approval of April 19, 2024 Regular Meeting Minutes**

On MOTION by Mr. Smith and seconded by Mr. Caputo, with all in favor, the April 19, 2024 Regular Meeting Minutes, as presented, were approved.

TENTH ORDER OF BUSINESS**Staff Reports****A. District Counsel: Kutak Rock LLP**

Mr. Earlywine asked if Operation and Maintenance (O&M) assessments will be collected through the closings. Mr. Smith stated that there have not been any closings yet but, when they close, the O&M assessments will be collected. Mr. Earlywine asked if Estoppel Letters will be used. Mr. Smith replied affirmatively.

Mr. Rom discussed the difference between assessments being collected off-roll and through the Estoppel process at closings.

Mr. Earlywine discussed another collection option at closings.

B. District Engineer (Interim): HSQ Group, LLC

There was no report.

C. District Manager: Wrathell, Hunt and Associates, LLC

- **NEXT MEETING DATE: June 21, 2024 at 12:00 PM**

- **QUORUM CHECK**

The June 21, 2024 meeting will likely be cancelled.

Discussion ensued regarding registering with the Commission on Ethics and filing Form 1 electronically.

ELEVENTH ORDER OF BUSINESS**Board Members' Comments/Requests**

There were no Board Members' comments or requests.

144 **TWELFTH ORDER OF BUSINESS**

Public Comments

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146 No members of the public spoke.

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148 **THIRTEENTH ORDER OF BUSINESS**

Adjournment

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150 **On MOTION by Mr. Smith and seconded by Mr. Caputo, with all in favor, the**
151 **meeting adjourned at 12:36 p.m.**

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[SIGNATURES APPEAR ON THE FOLLOWING PAGE]

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Secretary/Assistant Secretary

Chair/Vice Chair

PARKER POINTE
COMMUNITY DEVELOPMENT DISTRICT

STAFF
REPORTS

PARKER POINTE COMMUNITY DEVELOPMENT DISTRICT		
BOARD OF SUPERVISORS FISCAL YEAR 2023/2024 MEETING SCHEDULE		
LOCATION		
<i>Office Park at California Club, 1031 Ives Dairy Road, Suite 228, Miami, Florida 33179</i>		
DATE	POTENTIAL DISCUSSION/FOCUS	TIME
February 16, 2024	Public Hearings and Regular Meeting	12:00 PM
March 15, 2024 CANCELED	Regular Meeting	12:00 PM
April 19, 2024	Regular Meeting	12:00 PM
May 17, 2024	Regular Meeting	12:00 PM
June 21, 2024 CANCELED	Regular Meeting	12:00 PM
July 19, 2024 CANCELED	Regular Meeting	12:00 PM
August 16, 2024	Regular Meeting	12:00 PM
September 20, 2024	Regular Meeting	12:00 PM