



Rizzetta & Company

Trout Creek Community Development District

**Board of Supervisors' Meeting
October 16, 2024**

**District Office:
2806 N. Fifth Street
Unit 403
St. Augustine, FL 32084**

www.troutcreekcdd.org

TROUT CREEK COMMUNITY DEVELOPMENT DISTRICT

Kayak Club, 100 Kayak Way, St. Augustine, FL 32092

www.troutcreekcdd.org

Board of Supervisors	Mike McCollum Vincent Sajkowski Frank Murphy Ryan Stone Clint Wright	Chairman Vice Chairman Assistant Secretary Assistant Secretary Assistant Secretary
District Manager	Melissa Dobbins	Rizzetta & Company, Inc.
District Counsel	Katie Buchanan	Kutak Rock LLP
District Engineer	Brad Davis Matt Melchiori	Prosser Inc.

All cellular phones must be placed on mute while in the meeting room.

The Audience Comments portion, **on Agenda Items Only**, will be held at the beginning of the meeting. The Audience Comments portion of the agenda, **on General Items**, will be held at the end of the meeting. During these portions of the agenda, audience members may make comments on matters that concern the District (CDD) and will be limited to a total of three (3) minutes to make their comments.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting/hearing/workshop is asked to advise the District Office at least forty-eight (48) hours before the meeting/hearing/workshop by contacting the District Manager at (239) 936-0913. 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), who can aid you in contacting the District Office.

A person who decides to appeal any decision made at the meeting/hearing/workshop with respect to any matter considered at the meeting/hearing/workshop is advised that person will need a record of the 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 the appeal is to be based.

TROUT CREEK COMMUNITY DEVELOPMENT DISTRICT

District Office · St. Augustine, Florida · (904) 436-6270
Mailing Address – 3434 Colwell Avenue, Suite 200, Tampa, Florida 33614
www.troutcreekcdd.org

October 8, 2024

Board of Supervisors
Trout Creek Community
Development District

FINAL AGENDA

Dear Board Members:

The **regular** meeting of the Board of Supervisors of the Trout Creek Community Development District will be held on **October 16, 2024 at 3:00 p.m.** located at the Kayak Club, 100 Kayak Way, St. Augustine, FL 32092.

1. **CALL TO ORDER/ROLL CALL**
2. **PUBLIC COMMENT**
3. **BUSINESS ADMINISTRATION**
 - A. Consent Agenda
 1. Consideration of the Minutes of the Board of Supervisors' Meeting held on September 18, 2024..... Tab 1
 2. Ratification of the Operation and Maintenance Expenditures for September 2024..... Tab 2
4. **STAFF REPORTS**
 - A. District Counsel
 - B. District Engineer..... Tab 3
 1. Update Regarding Stormwater Outfall Repair
 2. Update Regarding Roadway Repairs
 - C. Construction Administrator
 - D. Landscape Reports
 1. Phase 1 – Greenery..... Tab 4
 2. Phase 2 – Tree Amigos Tab 5
 3. Phase 3 – Prestige – *(Under Separate Cover)*
 - E. Charles Aquatics Service Report – *(Under Separate Cover)*
 - F. General Manager Tab 6
 - G. District Manager
 1. Review Qualified Public Depository Banking Options
5. **BUSINESS ITEMS**
 - A. Further Discussion Regarding Additional Pond Mowing Tab 7
 - B. Review of Landscape Maintenance Phase 1 Bids – *(Under Separate Cover)*
 - C. Consideration of RFQ Proposals for District Engineer Services Tab 8
 - D. Review Residence Variance Request – *(Under Separate Cover)*
 - E. Consideration of Consent to Assignment of Landscape Maintenance Agreement PH-2 – *(Under Separate Cover)*
 - F. Discussion Regarding Miller Tennis Management “904 Tennis”
 - G. Discussion Regarding Café Operations..... Tab 9
 - H. Consideration of Reserve Study Proposals Tab 10
6. **AUDIENCE COMMENTS AND SUPERVISOR REQUESTS**
7. **ADJOURNMENT**

We look forward to seeing you at the meeting. In the meantime, if you have any questions, please do not hesitate to call us at (407) 472-2471.

Very Truly Yours,
Melissa Dobbins

District Manager

Tab 1

MINUTES OF MEETING

Each person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that 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.

**TROUT CREEK
COMMUNITY DEVELOPMENT DISTRICT**

The meeting of the Board of Supervisors of Trout Creek Community Development District was held on **September 18, 2024, at 3:00 p.m.** at The Kayak Club, 100 Kayak Way, St. Augustine, FL 32092.

Present and constituting a quorum:

Mike McCollum	Board Supervisor, Chairman
Vincent Sajkowski	Board Supervisor, Vice Chairman
Clint Wright	Board Supervisor, Assistant Secretary

Also present were:

Melissa Dobbins	District Manager, Rizzetta & Co., Inc.
Scott Brizendine	District Manager, Rizzetta & Co., Inc. (speakerphone)
Katie Buchanan	District Counsel, Kutak Rock, LLP
Matt Melchiori	District Engineer, Prosser Inc. (speakerphone)
Belynda Tharpe	General Manager, First Service Residential
Jessica Knutelsky	Assistant Manager, First Service Residential
Brent Grimmell	Representative, EGIS Advisors
Chris Kenny	Representative, Prestige Landscaping
Zach Higginbotham	Account Manager, The Greenery
Kyle Carasea	Account Manager, Tree Amigos
David Roane	Construction Administrator
Dave Kaplan	Arbitrage Management (speakerphone)

Members of the public present.

FIRST ORDER OF BUSINESS

Call to Order

Mr. McCollum called the meeting to order at 3:00 p.m.

SECOND ORDER OF BUSINESS

**Audience Comments on
Agenda Items**

Audience Members inquired about the phase three turnover, the total number of lots/homes being assessed within the community, the District's insurance rates and the

49 details of its policy and a request for the Board to consider additional traffic signage in
50 the community.

51
52 **THIRD ORDER OF BUSINESS** **Consideration of the Minutes of**
53 **the Board of Supervisors'**
54 **Meeting held on August 21, 2024**
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On a motion by Mr. Wright, seconded by Mr. McCollum, with all in favor, the Board approved the minutes of the Board of Supervisors' special meeting held on August 21, 2024, for Trout Creek Community Development District.

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57 **FOURTH ORDER OF BUSINESS** **Ratification of the**
58 **Operation and Maintenance**
59 **Expenditures**
60 **for August 2024**
61

On a motion by Mr. Wright, seconded by Mr. Sajkowski, with all in favor, the Board ratified the Operation & Maintenance Expenditures for August 2024, in the amount of \$356,916.19, for Trout Creek Community Development District.

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63 **FIFTH ORDER OF BUSINESS** **Further Discussion of Investment Options**

64
65 Mr. Kaplan reviewed further options for 3, 6, 9 and 12 month Treasury Bills with the
66 Board.

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68 Discussion ensued amongst the Board regarding the options and no further action was
69 taken.

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71 **SIXTH ORDER OF BUSINESS** **Consideration of Resolution**
72 **2024-05; Setting Fiscal Year**
73 **2024-2025 Meeting Dates**
74

On a motion by Mr. McCollum, seconded by Mr. Wright, with all in favor, the Board adopted Resolution 2024-05, Setting Fiscal Year 2024-2025 Meeting Dates, for Trout Creek Community Development District.

75
76 **SEVENTH ORDER OF BUSINESS** **Consideration of EGIS**
77 **Insurance Renewal**
78

79 Mr. Grimmel reviewed the Board's insurance policy renewal, with FIA, and asked if there
80 were any questions.

81
82 Mr. Grimmel stated that FIA is specialized in unique taxing districts and EGIS is an agency
83 that works with over 900 CDDs within the state of Florida.
84

85 Mr. Wright stated that once the board has an updated reserve study he would feel more
86 comfortable for the policy to be reviewed in further detail to ensure that it is adequate in
87 coverage.

88
89 Mr. Sajkowski requested to speak to an EGIS representative to review the need for
90 lifeguards at the lazy river.

91
92 The Board approved the FY 25 Insurance Policy renewal and authorized the Chair to
93 execute a finance agreement.
94

On a motion by Mr. Wright, seconded by Mr. Sajkowski, with all in favor, the Board approved the FY 25 EGIS Insurance Policy renewal with FIA, for Trout Creek Community Development District.

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96 **EIGHTH ORDER OF BUSINESS**

Staff Reports

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98 **A. District Counsel**

99
100 Ms. Buchanan reviewed a request from Supervisor Murphy to create a Consent
101 Agenda, where all Business Administration Items would be included under one section
102 to then be approved and voted on together.

103
104 Ms. Buchanan continued to explain, if a Board member wants to review an agenda item
105 more in detail it can be removed out of the Consent Agenda at the meeting to be voted
106 on it separately.

107
108 Ms. Buchanan also noted that Supervisor Murphy requested that District Staff not read
109 their reports at the meeting, but instead the Board only ask questions at the meeting
110 since they have the reports a week prior to the meeting to review. The Board agreed to
111 modify the agenda and the process of meeting as suggested.

112
113 **B. District Engineer**

- 114
115 **1.) Stormwater Outfall Repair Update**
116 **2.) Discussion Regarding Roadway Repairs**

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118 Mr. Melchiori noted that the Stormwater Outfall Repair is going well, and they will continue
119 to update the board.

120
121 Discussion ensued amongst the Board regarding the three proposals behind Tab 5 on the
122 agenda. After discussion the board approved Cal-Tech with a not to exceed \$2K subject to
123 confirming the scope is all what is needed to get the proper samples.
124

On a motion by Mr. Wright, seconded by Mr. McCollum, with all in favor, the Board approved The Cal-Tech Proposal, not to exceed the amount of \$2,000, for Trout Creek Community Development District.

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126 Mr. Wright requested staff to collect proposals to fix potholes on Shearwater Pkwy.

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3.) Discussion Regarding Crosswalk

Mr. Wright updated the Board that he received a resident request to add blinking lights or other alternatives to make the area safer by the new school.

Ms. Buchanan noted that the CDD owns the roads, but the District would still be required for traffic signage or modifications to be approved by the county.

Mr. McCollum noted a traffic study would be needed first.

The Board authorized Mr. Wright to work with the District Engineer to produce a proposal for a Traffic Study for the board to consider at a future meeting.

C. Construction Administrator

Mr. Roane noted the FPL Pole should be removed from the community by February 2026.

D. Landscape Reports

1.) Phase 1 – The Greenery

Mr. Higginbotham noted they have a hired a new account manager to work on this account and help with monitoring and overseeing the detail work.

Ms. Tharpe noted that service is adequate, better than it has been. She also noted the pinestraw should be replenished by mid-October.

Mr. Wright requested Ms. Tharpe to confirm when the entrance enhancements will be scheduled that was previously approved.

2.) Phase 2 – Tree Amigos

Mr. Carasea was present for questions.

Mr. Wright noted he had questions but will email them to the vendor.

3.) Phase 3 – Prestige

Mr. Kenny was present for questions.

E. Charles Aquatics Service Report

There were no questions regarding the Charles Aquatics Service Report.

F. General Manager

- 1.) August Maintenance Report**
- 2.) Hub Café Category Sales Report August 2024**
- 3.) Item Sales Report**

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- 4.) Ticket Sales
- 5.) Lifestyle Income August 2024 Profit & Loss
- 6.) Lifestyle Profit & Loss Total Expense
- 7.) Profit & Loss Summary

Ms. Tharpe noted she will have information regarding the operation of the café at the next meeting.

G. District Manager

1.) Acceptance of Updated District Management Agreement

Ms. Dobbins updated the Board that the RFP for Landscape Maintenance for Phase 1 were advertised, and bids should be ready for review at the next meeting.

Discussion ensued amongst the Board regarding adding additional ponds to the current landscape scope for all phases. The Board agreed to table this discussion until the next meeting. The board requested District Staff to send out a survey to get further feedback regarding adding the ponds to the CDD’s landscape maintenance scope of service. The Board also requested this pricing to be added as an addendum to the RFP for Phase one.

Ms. Buchanan updated the Board that the current Traffic Enforcement Agreement with the county needs to be updated to include all the streets within the community since when it was first drafted.

NINTH ORDER OF BUSINESS

Review Amenity Suspension Appeal

There was no one present in the audience to appeal their suspension.

TENTH ORDER OF BUSINESS

Consideration of First Service Residential Fiscal Year 2025 Staffing Addendum

Discussion and review ensued amongst the Board regarding the updated addendum submitted by First Service Residential. (Exhibit A)

On a motion by Mr. Wright, seconded by Mr. Sajkowski, with all in favor, the Board approved First Service Residential’s Fiscal Year 2025 Staffing Addendum, for Trout Creek Community Development District.

ELEVENTH ORDER OF BUSINESS

Consideration of Lifeguard Services Proposals

The Board reviewed and discussed all the Lifeguard Services proposals presented to the District.

On a motion by Mr. Wright, seconded by Mr. Sajkowski, with all in favor, the Board approved Vesta's FY 25 Lifeguard Service Proposal, for Trout Creek Community Development District.

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TWELFTH ORDER OF BUSINESS

**Consideration of Pond
Maintenance Proposals**

The Board reviewed and discussed all the Pond Maintenance Services proposals presented to the District.

After discussion, the Board approved a 3-year agreement with a fixed rate of \$3,853 monthly with Charles Aquatics for Pond Maintenance and \$400 quarterly for fountain maintenance.

On a motion by Mr. Sajkowski, seconded by Mr. Wright, with all in favor, the Board approved a 3-year agreement with a fixed rate of \$3,853 monthly with Charles Aquatics for Pond Maintenance and \$400 quarterly for fountain maintenance, for Trout Creek Community Development District.

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THIRTEENTH ORDER OF BUSINESS

**Consideration of Reserve Study
Proposals**

The Board tabled this agenda item.

FOURTEENTH ORDER OF BUSINESS

**Consideration of RFQ Proposals
for District Engineer Services**

The Board tabled this agenda item.

FIFTEENTH ORDER OF BUSINESS

**Consideration of LED Lighting
Agreement for Shearwater Phase
3G**

On a motion by Mr. Wright, seconded by Mr. McCollum, with all in favor, the Board approved the LED Lighting Agreement for Shearwater Phase 3G, for Trout Creek Community Development District.

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SIXTEENTH ORDER OF BUSINESS

**SUPERVISOR REQUESTS &
AUDIENCE COMMENTS**

SUPERVISORS

Mr. Wright stated that a resident has approached him regarding their request for a variance to keep their fence in a drainage easement.

The Board noted that these request have been declined previously, but will give the resident an opportunity to be heard at the next meeting.

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AUDIENCE

Audience Members inquired about adding ponds to the current landscape mowing schedule, the risk of using trails, request for a non-resident tennis membership fee, need for additional termite bonds, additional traffic studies and traffic counts, request for golf cart use on multipurpose path be revisited with county and requested update on conveyance of property for the district amenities.

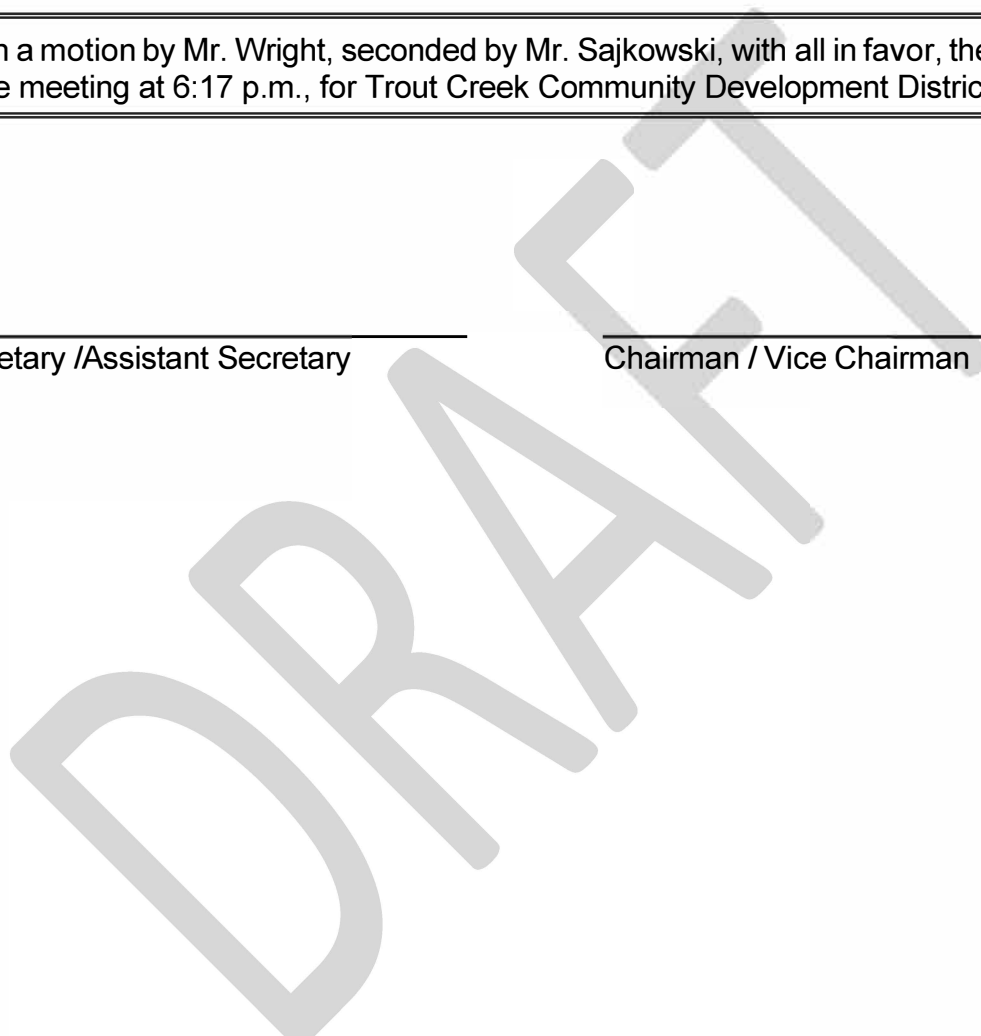
SEVENTEENTH ORDER OF BUSINESS

Adjournment

On a motion by Mr. Wright, seconded by Mr. Sajkowski, with all in favor, the Board adjourned the meeting at 6:17 p.m., for Trout Creek Community Development District.

Secretary /Assistant Secretary

Chairman / Vice Chairman



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Exhibit A

“First Service Residential Fiscal Year 2025 Staffing Addendum”

DRAFT

Tab 2

TROUT CREEK COMMUNITY DEVELOPMENT DISTRICT

District Office - St. Augustine, Florida - (904)-436-6270

Mailing Address - 3434 Colwell Avenue, Suite 200, Tampa, Florida 33614

troutcreekcdd.org

Operation and Maintenance Expenditures Presented For Board Approval September 2024

Attached please find the check register listing the Operation and Maintenance expenditures paid from September 1, 2024 through September 30, 2024. This does not include expenditures previously approved by the Board.

The total items being presented: ~~\$279,948.52~~

Approval of Expenditures:

_____ Chairperson

_____ Vice Chairperson

_____ Assistant Secretary

Trout Creek Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2024 Through September 30, 2024

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
Arrow Exterminators	101286	58534196	Monthly Pest Control Services 09/24	\$ 116.00
Arrow Exterminators	101286	58534197	Pest Control Services 09/24	\$ 96.00
AT&T	20240915-02	151561791 09/24 Autopay	Internet Services 09/24	\$ 32.10
AT&T	20240915-01	299942543 09/24 Autopay	Internet Services 09/24	\$ 32.10
AT&T	20240927-03	323382736 09/24 Autopay	TV & Internet Services 09/24	\$ 134.82
AT&T	20240901-01	324079257 08/24 Autopay	Phone & Internet Services 08/24	\$ 170.32
Atlantic Security	101273	356022	Service Call and Key Fob's 09/24	\$ 2,058.75
B & S Signs, Inc.	101301	241266-1	Tennis Court Light Replacement 09/24	\$ 1,931.43
Bob's Backflow & Plumbing Services, Inc.	101281	13163	Backflow Test / Certified 05/24	\$ 45.00
Buster's Cleaning Service	101260	132	Janitorial Services 09/24	\$ 1,600.00
Charles Aquatics, Inc.	101261	51601	Pond Maintenance 09/24	\$ 3,511.00
Cronin Ace Hardware	101274	Monthly Summary 08/24 324	Miscellaneous Supplies 08/24	\$ 210.90

Trout Creek Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2024 Through September 30, 2024

Vendor Name	Check Number	Invoice Number	Invoice Description	Invoice Amount
CX3, Inc. dba Sundancer Sign Graphics	101295	54305	Install Signs and Post for Playgrounds 07/24	\$ 2,100.00
Egis Insurance Advisors, LLC	101262	25196	Workman's Compensation Policy #WC100124682 10/01/24-10/01/25	\$ 850.00
Egis Insurance Advisors, LLC	101299	26013	Down Payment for Policy #100124682 10/01/24-10/01/25	\$ 8,005.85
FirstService Residential Florida, Inc.	101263	10998044	Management Services 08/10/24-08/23/24	\$ 20,773.23
FirstService Residential Florida, Inc.	101275	11000566	Management Fee - Phone Allowance 09/24	\$ 1,725.00
FirstService Residential Florida, Inc.	101287	11002145	Management Services 08/24/24-09/06/24	\$ 23,968.53
Florida Department of Revenue	20240910-01	65-8017062725-9 08/24 ACH	65-8017062725-9 Sales & Use Tax 08/24	\$ 751.57
Florida Natural Gas	101282	1083045ES	Natural Gas Services 08/24	\$ 9.35
Florida Power & Light Company	20240903-01	03602-11429 07/24 Autopay	38 Rosemont Dr 07/24	\$ 33.49
Florida Power & Light Company	20240924-02	39473-03305 08/24 Autopay	25 Ridgewind Dr #LTG 08/24	\$ 50.91
Florida Power & Light Company	20240924-01	67979-76187 08/24 Autopay	574 Timberwolf Trl 08/24	\$ 26.10
Florida Power & Light Company	20240903-01	98411-59305 07/24 Autopay	37 Timberwolf Trl 07/24	\$ 42.66

Trout Creek Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2024 Through September 30, 2024

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
Florida Power & Light Company	20240926-01	Monthly Summary 08/24 Autopay 324	Electric Services 08/24	\$ 9,851.32
Florida Power & Light Company	20240919-01	Monthly Summary A 08/24 Autopay 324	Electric Services 08/24	\$ 96.43
Gannett Florida LocaliQ	101264	0006641467	Account# 764106 Legal Advertising 08/24	\$ 779.12
HD Supply, Inc.	101288	1851603 Summary 08/24	Miscellaneous Supplies 08/24	\$ 142.58
HD Supply, Inc.	101300	1851603 Summary 09/24	Miscellaneous Supplies 09/24	\$ 315.80
JEA	20240904-01	9634626977 07/24 Autopay	Water-Sewer Services 07/24	\$ 51,971.37
Konica Minolta Premier Finance	101265	536980287	Copier Lease #500-00673850-000 09/24	\$ 492.57
Kutak Rock, LLP	101266	3440011	Legal Services 07/24	\$ 7,058.59
Mini Melts of America, Inc.	101283	495523	Ice Cream Precup 09/24	\$ 79.90
Poolsure	101257	131295624177	Pool Chemicals 09/24	\$ 4,588.50
Prestige Landscapes of North Florida, Inc.	101280	12272	Irrigation 09/24	\$ 1,242.50
Prestige Landscapes of North Florida, Inc.	101267	12273	PH3 Monthly Maintenance 09/24	\$ 20,953.17

Trout Creek Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2024 Through September 30, 2024

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
Prestige Landscapes of North Florida, Inc.	101292	12275	Irrigation 08/24	\$ 110.00
Prestige Landscapes of North Florida, Inc.	101292	12276	Irrigation 08/24	\$ 1,772.50
Progressive Entertainment, Inc.	101296	129333889	Dive in Movie Night 08/09/24	\$ 345.00
Prosser, Inc.	101289	53297	Engineering Services 08/24	\$ 1,025.00
Republic Services	20240905-05	0687-001453776 Autopay	Waste Disposal Services 09/24	\$ 700.48
Richard Clinton Wright	101271	CW082124	Board of Supervisors Meeting 08/21/24	\$ 200.00
Richard Clinton Wright	101297	CW091824	Board of Supervisors Meeting 09/18/24	\$ 200.00
Rizzetta & Company, Inc.	101256	INV0000093038	District Management Fees 09/24	\$ 4,585.09
Ruppert Landscape, LLC	101268	663036	Replace Broken Oak Trees on Shearwater Parkway 08/24	\$ 3,800.00
Ruppert Landscape, LLC	101272	663042	Replace Irrigation Clock and Module 08/24	\$ 4,800.00
Ruppert Landscape, LLC	101276	664317	Monthly Landscape Maintenance 08/24	\$ 30,054.60
Shaw's Services, LLC	101290	31041	Remove Broken Tree over Walkway Deck 09/24	\$ 1,000.00

Trout Creek Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2024 Through September 30, 2024

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
Shaw's Services, LLC	101294	31091	Tree Maintenance 09/24	\$ 1,200.00
Surfside Pools	101277	203033	Pool Maintenance 09/24	\$ 3,500.00
Surfside Pools	101284	308208	Pool Chemicals 08/24	\$ 201.00
TECO Peoples Gas	20240927-02	211011457499 08/24 Autopay	Natural Gas Services - 182 Kayak Way 08/24	\$ 47.48
TECO Peoples Gas	20240927-01	221008807523 08/24 Autopay	Natural Gas Services - 2105 Shearwater Pkwy 08/24	\$ 56.22
The Greenery of North Florida, Inc.	101278	762656	Landscape Maintenance Contract #59056 09/24	\$ 17,681.82
Trout Ceek CDD	DC090624	DC090624	Debit Card Replenishment 09/06/24	\$ 4,857.61
Vesta Property Services, Inc.	101291	421396	Lifeguard/Supervisor/Pool 08/24	\$ 35,210.48
VGlobal Tech	101279	6489	Quarterly ADA & WCAG Audits 09/24	\$ 100.00
VGlobal Tech	101279	6503	Website Maintenance 09/24	\$ 175.00
Vincent J Sajkowski	101298	VS091824	Board of Supervisors Meeting 09/18/24	\$ 200.00
W.B. Mason Co., Inc.	101303	249300674	Miscellaneous Operating Supplies 09/24	\$ 90.99

Trout Creek Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2024 Through September 30, 2024

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
W.B. Mason Co., Inc.	101303	249328036	Miscellaneous Operating Supplies 09/24	\$ 78.98
Welch Tennis Courts, Inc.	101259	77687	Tennis Court Brushes/Brooms 08/24	\$ 1,860.61
Wellbeats, Inc.	101285	EPIV00000093502	WBC_PLUS Content Period 09/24	<u>\$ 249.00</u>
Report Total				<u>\$ 279,948.52</u>

Tab 3



Cal -Tech Testing, Inc.

- Engineering
- Geotechnical
- Environmental

LABORATORIES

P.O. Box 1625 • Lake City, FL 32056
Tel. (386) 755-3633 • Fax (386) 752-5456

2907 Spring Glan Rd , Jacksonville, FL 32207
Tel. (904) 381-8901 • Fax (904) 381-8902

October 2, 2024

Trout Creek CDD
100 Kayak Way
St. Augustine, FL 32092

**RE: Pavement Evaluation
Shearwater Subdivision
St Augustine, Florida**

**ATTN: Jessica Knutelsky
Assistant General Manager**

Dear Mrs. Knutelsky:

This report presents the results of our pavement inspection for the existing roadways. The purpose of our pavement inspection is to determine the integrity of the asphalt structure and possible repair methods.

PAVEMENT & SUBSURFACE SOIL FIELD EXPLORATION

The 4 pavement cores were taken with a 6-inch diameter core barrel. All core and borehole locations were backfilled and patched with asphalt, as required, at completion. At each core sample location asphalt thickness was determined. The depth and type of base material verified. Subgrade material visually classified. Water table determinations made at two locations.

The pavement core specimens were delivered to and examined in the laboratory. All soils were visually classified in the field.

PAVEMENT & SUBSURFACE SOIL CONDITIONS

Pavement

Two lifts of asphalt have been placed. The bottom course appears to be a SP 12.5 type asphalt. The top course resembles a SP 9.5 finer mix. Photos of the pavement core specimens are enclosed in this report.

The thickness of the asphalt pavement surface courses was measured on the core specimens. Similarly, the thickness of the pavement base was measured after removing the core specimens. The following table summarizes the thicknesses of the pavement's surface and base with underlying subgrade/subbase soil description.

Core Location	Surface Course Material	Thickness (in)	Base Course Material	Thickness (in)	Subbase Description
C-1 Top	Asphalt	0.75	Limerock	8	Tan fine SAND w limerock
C-1 Bottom	Asphalt	1.75			
C-2 Top	Asphalt	0.75	Limerock	8	Tan fine SAND w limerock
C-2 Bottom	Asphalt	1.75			
C-3 Top	Asphalt	1.00	Limerock	8	Tan fine SAND w limerock
C-3 Bottom	Asphalt	1.50			
C-4 Top	Asphalt	1.00	Limerock	8	Tan fine SAND w limerock
C-4 Bottom	Asphalt	1.50			

Visual review of the encountered soils implies the subgrade soil was stabilized with lime rock to create a stabilized subbase. The base does not show signs of yielding or failure. Two locations for water table depth were examined to a depth of five feet. No water was encountered.

Numerous locations appear to have surface cracks in the top lift of pavement. Many areas appear to be raveling and separating between layers. In most areas cracks appear to be limited to the top course. Time is of the essence in areas where cracks penetrate through both asphalt layers as water intrusion into the base layer will exacerbate the deterioration of the asphalt layer. The "total" thickness of asphalt structure appears to be within the normal specification for this type of roadway.

CONCLUSION

The Stabilized subgrade soil and limerock base appear to be satisfactory as in place. The high-water table is a non-issue in the pavement structure. The bottom SP 12.5 asphalt layer appears to be structurally sound and has adequate thickness.

Our inspection points to the final SP 9.5 asphalt layer. The cracking and raveling appear to be caused by inadequate or lack of tack between asphalt layers. The heavy construction vehicle loads may also be contributing to the top layer movement. Further testing of the asphalt mix may be useful to determine if there is a design issue. This is out of the scope of this report.

To repair these areas, we suggest milling of the top 1" of asphalt and replacing. Care should be taken to clean the milled surface and apply the appropriate tack coating before paving. If cracks appear to be present in bottom lift a crack seal should be applied in those areas before placing top lift.

CLOSURE

Cal-Tech Testing, Inc. appreciates the opportunity to work with you on this project. Should you have any questions concerning this report, please do not hesitate to contact us.

Sincerely,

Cal-Tech Testing, Inc.

Gary McCollum

Gary McCollum
Executive Vice President

Enclosures:
Core Photos
Roadway Photos



CAL-TECH TESTING, INC.
2907 Spring Glen Road
Jacksonville, Florida 32207
Phone: (904) 381-8901

Pavement Core Specimen
Cal-Tech Testing Job #24-00477
Shearwater Subdivision Roadway
Trout Creek CDD



CAL-TECH TESTING, INC.
2907 Spring Glen Road
Jacksonville, Florida 32207
Phone: (904) 381-8901

Pavement Core Specimen
Cal-Tech Testing Job #24-00477
Shearwater Subdivision Roadway
Trout Creek CDD



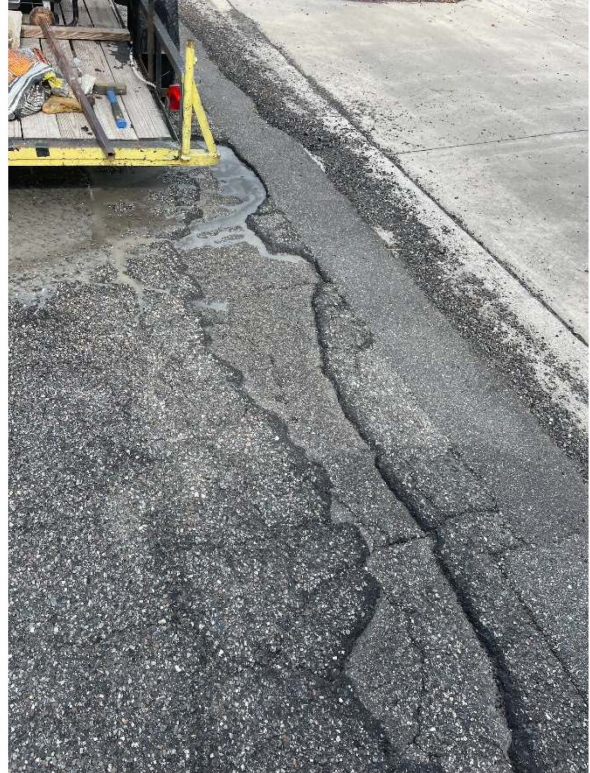
CAL-TECH TESTING, INC.
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Jacksonville, Florida 32207
Phone: (904) 381-8901

Pavement Core Specimen
Cal-Tech Testing Job #24-00477
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Cal-Tech Testing Job #24-00477
Shearwater Subdivision Roadway
Trout Creek CDD



CAL-TECH TESTING, INC.
2907 Spring Glen Road
Jacksonville, Florida 32207
Phone: (904) 381-8901

Site Photos
Cal-Tech Testing Job #24-00477
Shearwater Subdivision Roadway
Trout Creek CDD

Tab 4



the greenery, inc.®

— EMPLOYEE OWNED —

TROUT CREEK CDD MONTHLY LANDSCAPING REPORT

Phase 1





the greenery, inc.[®]

— EMPLOYEE OWNED —

Prepared by: Zachary Higginbotham
Customer Relations Manager
904-776-9483
zhigginbotham@thegreeneryinc.com

Trout Creek CDD
First Service Residential
Belynda Tharpe, Community Director

Trout Creek CDD Phase 1 Landscape Report

October 7th, 2024

Landscape Maintenance:

The crew has been mowing and edging when it is dry enough to do so. The team cleaned up the trails after Hurricane Helene. We will be on site after Hurricane Milton to inspect for damage and to clean up debris. The crews have also worked on cleaning up ornamental grass beds, keeping them off curbs and sidewalks, as well as weeding them.

Plant Health Care:

Shrub fertilizer was scheduled for October 14th, but it will be pushed back due to weather. Once rescheduled, the new date will be sent out.

Additional:

Magnolia tree replacement in The Cove as well as the soil additions and turf replacement along the clubhouse sidewalk have been completed. Irrigation timers are turned off for the hurricanes. Storm drains were cleaned up prior to Hurricane Milton.

Tab 5



Tree Amigos

Outdoor Services

Trout Creek CDD: Monthly Report

September 2024

Fungus/Pest/Fertilizer: Herbicides and pre-emergent has been applied to all Tree rings and landscape beds throughout Trout Creek CDD. A blanket application of herbicide has been applied to the turf to combat any sedge and dollar weed.

Maintenance: All areas throughout Trout Creek CDD have been mowed, edged, and lined trimmed, as needed. The days that we are not mowing we are focused on detailing. We cleaned up the pond bank plantings and cut back the knockout roses on Shearwater Pkwy and the Outpost. We are cutting back and removing any dead or deficient plant material as we come across it.

Irrigation: All the irrigation is working as it should. We have inspected the irrigation in phase 2 and repaired anything broken. The system will be shut down when we have an excess of rain forecasted.

Tab 6

**Trout Creek CDD
GM Operations Report for October 16, 2024**

Administration:

- New hire Matthew (Maintenance Tech) on-boarding/training
- 90-day check-in with Yubi (resident services coordinator)
- Monthly meeting with Supervisor Murphy
- Facility walk to create a to do list of projects for inside of the hub and outside amenity areas (pavilion, porch, outside café tables, etc..)
- Community meet and greet with Sherriff Hardwick and county officials
- Landscape drive with Prestige owner
- AGM and GM Landscape drive phase 1. List of areas that required attention was provided to The Greenery
- AGM and GM Landscape drive phase 2. List of areas that required attention was provided to Tree Amigo's
- RFP landscape meeting with those bidding on phase 1
- Café Operations

Kayak Hub:

- September Square Café Category Sales Report ([attached](#))
- September TCCDD Square Sales Report ([attached](#))

Lifestyle

- Profit & Loss Report ([attached](#))**904 Tennis**
- Mixed Doubles Social
- Kids Friday Night Pizza Social
- Matt Lucas hired as the dedicated pro for Shearwater

Maintenance/Vandalism/Mischief Issues:

- September Report ([attached](#))

BELYNDA THARPE

General Manager-Trout Creek CDD
100 Kayak Way| St. Augustine, FL | 32092
Direct 904.342.3739
Email belynda.tharpe@fsresidential.com

Sep 1, 2024–Sep 30, 2024



Category Sales Report

The HUB Cafe

Category	Items Sold	Gross Sales
Accessories	14	\$460.00
Candy	89	\$137.25
Chips	46	\$67.50
Cold Beverages	128	\$199.50
Hot Beverages	8	\$8.00
Total	390	\$1,652.75

Category	Items Sold	Gross Sales
Ice Cream	64	\$256.00
Pizza	6	\$24.00
RENTAL FEES	5	\$425.00
Snacks	30	\$75.50
Total	390	\$1,652.75

Sep-24

Lifestyle Profit & Loss

TOTAL EXPENSES	Estimated	Actual
	\$0.00	\$126.33

Coffee & Conversation	9/11/2024	Actual
Breakfast Items		\$126.33
Total	\$0.00	\$126.33

Column1	Column2	Actual
Total	\$0.00	\$0.00

Column1	Estimated	Actual
Total	\$0.00	\$0.00

Column1	Estimated	Actual
Total	\$0.00	\$0.00

Column1	Estimated	Actual
Total	\$0.00	\$0.00

Column1	Estimated	Actual
Total	\$0.00	\$0.00

Sep 1, 2024–Sep 30, 2024



Category Sales Report

Trout Creek CDD

Category	Items Sold	Gross Sales
RENTAL FEES	30	\$5,624.50
Security Deposit	3	\$1,215.00
Special Events	15	\$1,072.40
Total	48	\$7,911.90

(1)



Repaired Torn Canvas At Tot lot

Created: Tue, 10/8/2024

Before

(2)



Repaired Torn Canvas At Tot Lot

Created: Tue, 10/8/2024

After

(3)



Repaired Light Fixture At Outpost

Created: Tue, 10/8/2024

Before



(4)



Repaired Light Fixture At Outpost

Created: Tue, 10/8/2024

After

(5)



Replaced Discharged Fire Extinguisher At Outpost

Created: Tue, 10/8/2024

Before



(6)



Replaced Discharged Fire Extinguisher At Outpost

Created: Tue, 10/8/2024

After



(7)



Installed New No Parking Sign At Cove Townhomes

Created: Tue, 10/8/2024

Before

(8)



Installed New No Parking Sign At Cove Townhomes

Created: Tue, 10/8/2024

After



(9)



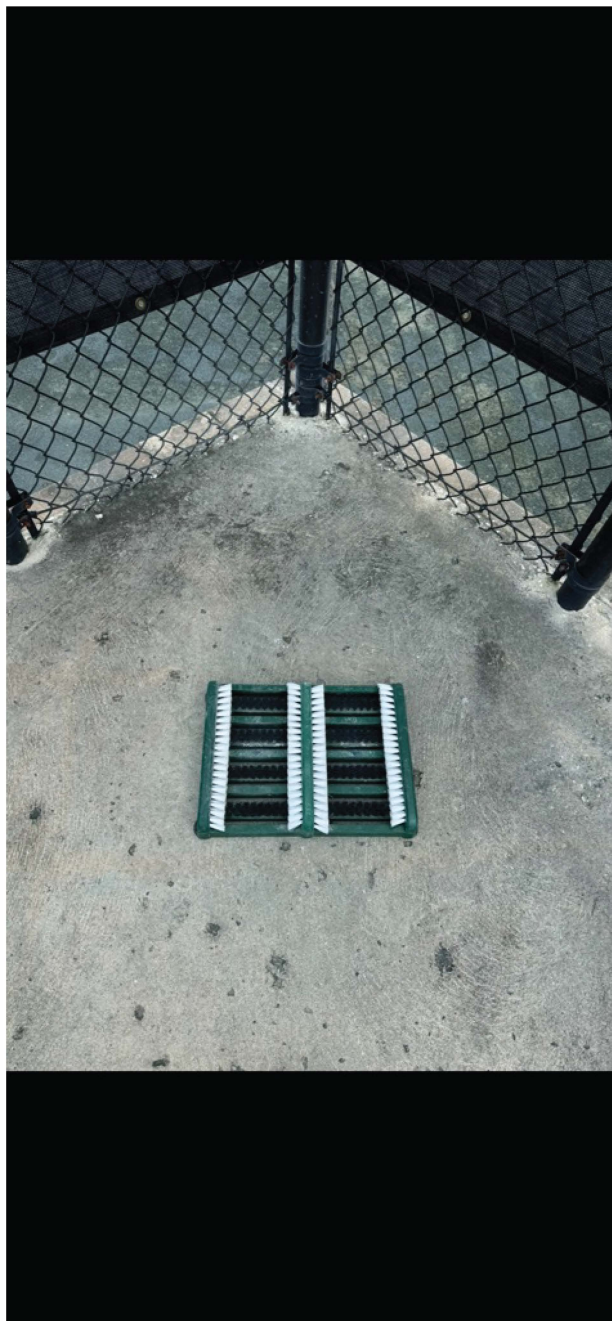
Installed Sneaker Cleaners At Tennis Courts

Created: Tue, 10/8/2024

Before



(10)



Installed Sneaker Cleaners At Tennis Courts

Created: Tue, 10/8/2024

After



(11)



Filled Sinkhole At Windley Dr

Created: Tue, 10/8/2024

Before



(12)



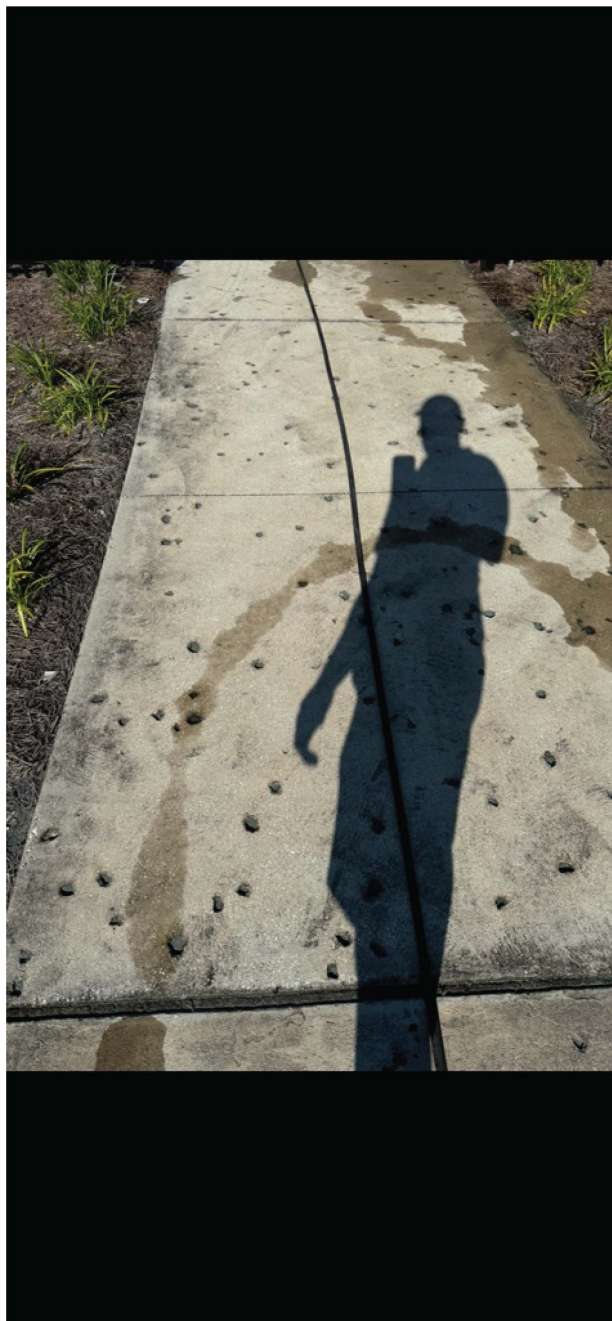
Filled Sinkhole At Windley Dr

Created: Tue, 10/8/2024

After



(13)



Power washed Sidewalks At Tennis Courts

Created: Tue, 10/8/2024

Before

(14)



Power Washed Sidewalks At Tennis Courts

Created: Tue, 10/8/2024

After



(15)



Replaced Auto Fill Valve Float At Lap Pool

Created: Tue, 10/8/2024

Before

(16)



Replaced Auto Fill Valve Float At Lap Pool

Created: Tue, 10/8/2024

After

(17)



Repaired Down Sign At Bowery Ave

Created: Tue, 10/8/2024

Before

(18)



Repaired Down Sign At Bowery Ave

Created: Tue, 10/8/2024

After



(19)



Removed Tree From Boardwalk At Kayak Launch

Created: Tue, 10/8/2024

Before

(20)



Removed Tree From Boardwalk At Kayak Launch

Created: Tue, 10/8/2024

After



(21)



Repaired Broken Outlet Post At Pool Deck

Created: Tue, 10/8/2024

Before

(22)



Repaired Broken Outlet Post At Pool Deck

Created: Tue, 10/8/2024

After

(23)



Refurbished Benches At Pavilion

Created: Tue, 10/8/2024

Before

(24)



Refurbished Benches At Pavilion

Created: Tue, 10/8/2024

After

(25)



Repaired Landscape Lighting At Pavilion

Created: Tue, 10/8/2024

Before

(26)



Repaired Landscape Lighting At Pavilion

Created: Tue, 10/8/2024

After



(27)



Cleaned Lanterns Throughout Amenities

Created: Tue, 10/8/2024

Before

(28)

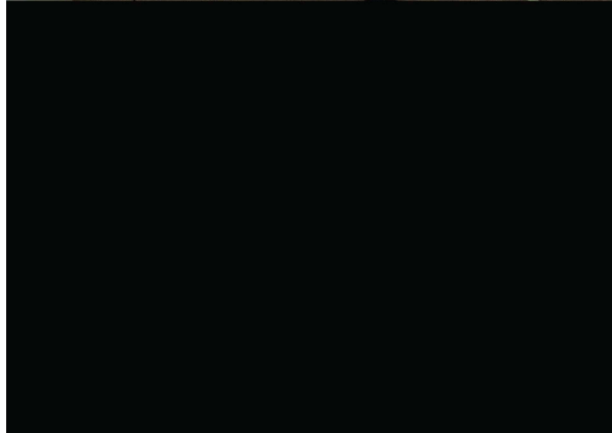
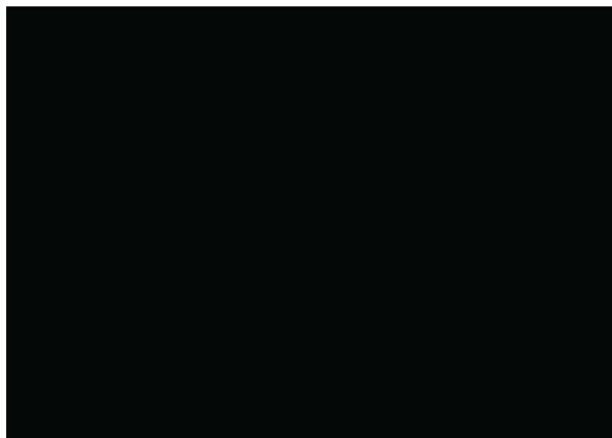


Cleaned Lanterns Throughout Amenities

Created: Tue, 10/8/2024

After

(29)



Cleaned All Life Rings Throughout Amenities

Created: Tue, 10/8/2024

Before

(30)



Cleaned All Life Rings Throughout Amenities

Created: Tue, 10/8/2024

After

(31)



Stained Doors In Hub/kayak Club

Created: Tue, 10/8/2024

Before



(32)



Stained Doors In Hub/kayak Club

Created: Tue, 10/8/2024

After



(33)



Installed Bike Rack At Ion Drive

Created: Tue, 10/8/2024

Before

(34)



Installed Bike Rack At Ion Drive

Created: Tue, 10/8/2024

After

(35)



Repainted Fire Hydrants

Created: Tue, 10/8/2024

Before

(36)



Repainted Fire Hydrants

Created: Tue, 10/8/2024

After

(37)



Removed Broken Seesaw, Covered Under Kompan Warranty For Replacement

Created: Tue, 10/8/2024

Before

(38)



Removed Broken Seesaw, Covered Under Kompan Warranty For Replacement

Created: Tue, 10/8/2024

After

(39)



Cleaned East Accelerator Pack

Created: Tue, 10/8/2024

Before

(40)



Cleaned East Accelerator Pack

Created: Tue, 10/8/2024

After



(41)



Removed Tree From Trail #2

Created: Tue, 10/8/2024

Before

(42)



Removed Tree From Trail #2

Created: Tue, 10/8/2024

After

(43)



Cleaned Packs At Pump Room #2

Created: Tue, 10/8/2024

Before

(44)



Cleaned Packs At Pump Room #2

Created: Tue, 10/8/2024

After

(45)



Painted Exterior Doors Throughout Amenities

Created: Tue, 10/8/2024

Before



(46)



Painted Exterior Doors Throughout Amenities

Created: Tue, 10/8/2024

After



(47)



Reattached Transformers At Pool Deck

Created: Tue, 10/8/2024

Before

(48)



Reattached Transformers At Pool Deck

Created: Tue, 10/8/2024

After

Completed by Johnnie verdell

Tab 7

Pond Mowing Feedback

Resident	Pond Location	YES	NO
Kelly McDonald	Lombard Way		X
Deborah Green	Sumter Pl	X	
Michelle Casto	Ancote Way	X	
Phil Krites	Windley Dr		X
Janice & Evan Rimmer	Permit Ct	X	
Robert Augustine	Ancote Way		X
Sandy Woolcott		X	
Corey Comegys	Boylston Ct	X	
Mary Santacroce	Rivercliff Trail	X	
Jason Zollinger	Seaforth Dr	X	
Trevor Lemis		X	
Manzura Bender			X
Jessica		X	
Jeremy Ketterer	Glenneyre Cir		X
Stephanie Ketterer	Glenneyre Cir		X
Erin Desjadon			X
Faith Riley			X
Christine Farlow			X
Tina Robinson	Ibiza Ct		X
Ingy Salib	Bluffton Ct		X
Stewart Anderson	Glenneyre Cir		X

Resident	Pond Location	YES	NO
HR and Sandra Browning	Seaforth Dr	X	
Ridhika Lunkad			X
Praveen Jain			X
RESULTS:		10	14

Pond Mowing
Homes Quantity Research

Pond Location

Homes

Image

2A Palisade & Rivercliff

14



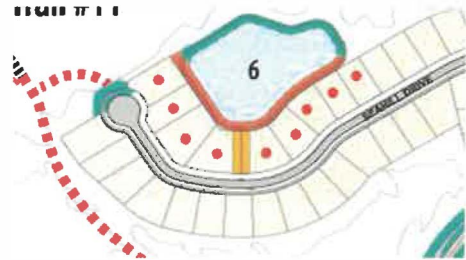
2B Bluffton, Woodsong & Laurel

36



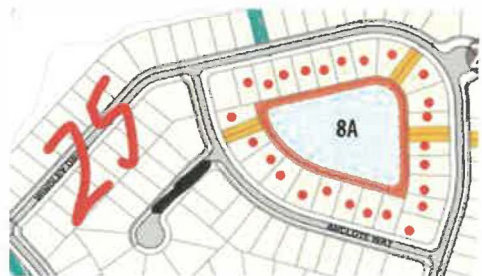
6 Seahill Dr

9



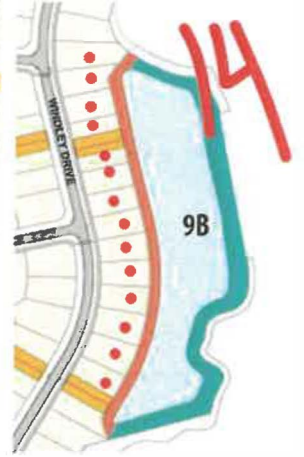
8A Anclore & Windley

25



9A Permit, Totten & Windley

17



9B Windley

14

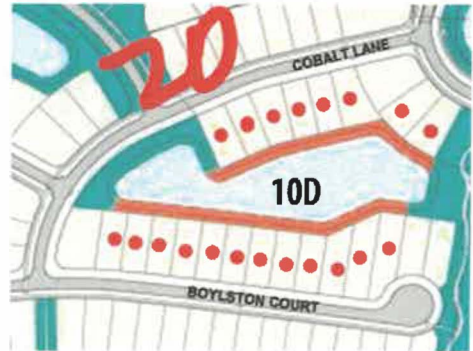
9C Sumter, Windley & Felasco

22



10 D Boylston & Cobalt

20



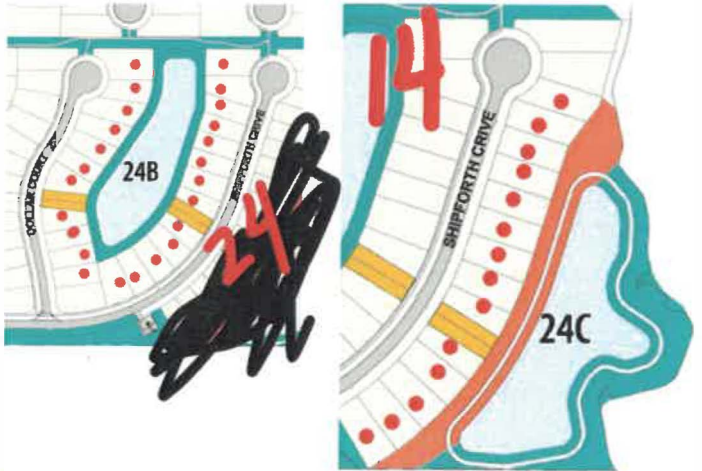
12A Magdaleno, Windley & Sumter 22



23A Rushing Dr 3



24B Dollar & Seaforth 24



24B Seaforth 14

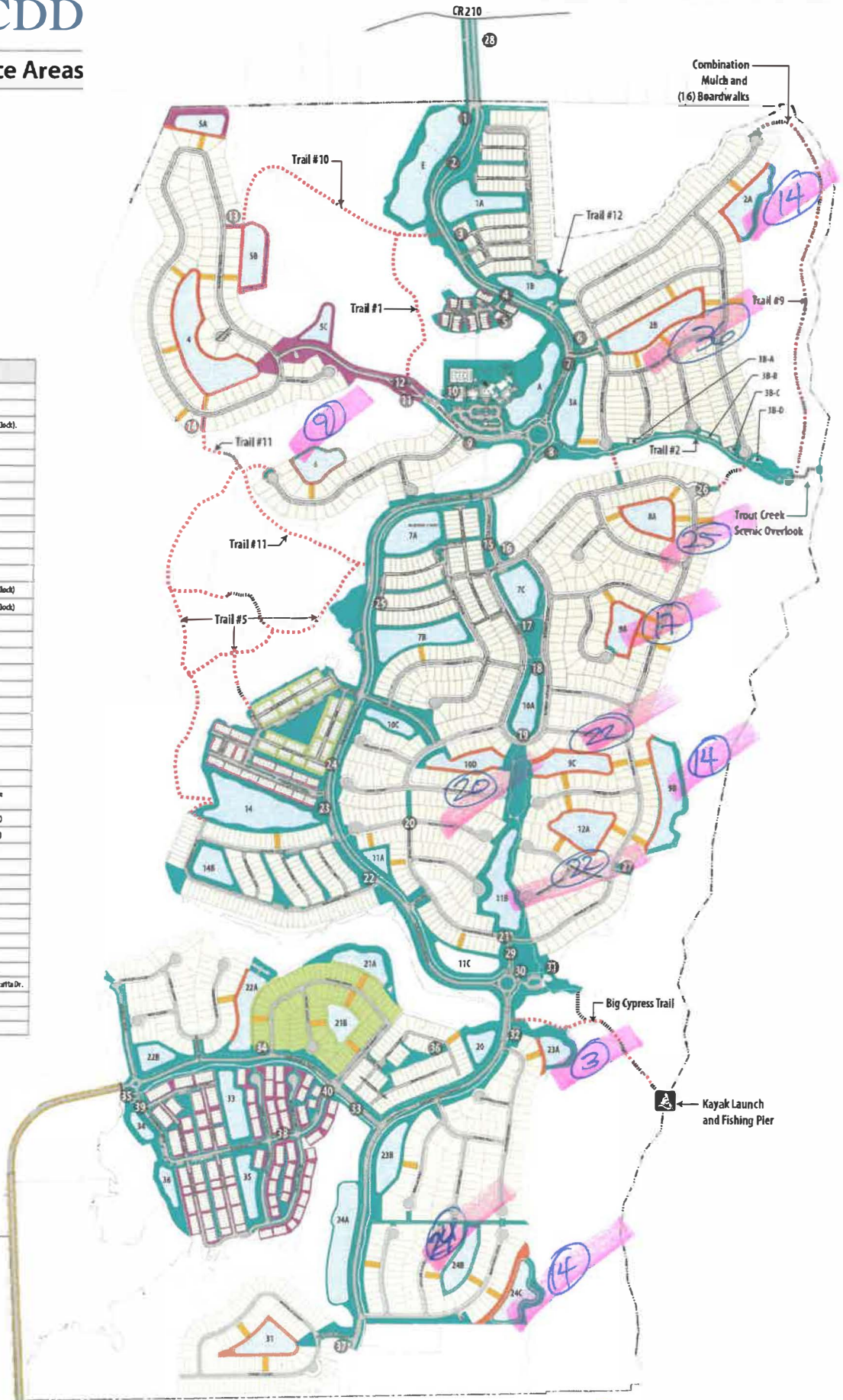
Trout Creek CDD

Landscape Maintenance Areas

LEGEND

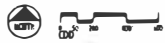
- HOA Maintained Areas
- CDD Maintained Areas
- Homeowner Maintained Pond Bank
- 360 Maintained
- Maintenance Access Easement
- CDD Maintained Trail
- CDD Maintained Boardwalk

Icon Number	Note
1	CDD 2" Irrigation Meter, 200 Shearwater Pkwy
2	CDD Electric Meter #1, 2755 Shearwater Pkwy
3	CDD Electric Meter #2, 4355 Shearwater Pkwy (Phase 1 Irrigation Clock)
4	Phase 1C, 2" HOA Irrigation Meter, 19 Tallica Trail
5	Timberline Dedicated Irrigation (Dedicated Irrigation Clock)
6	CDD Electric Meter #3, 6395 Shearwater Pkwy
7	CDD 2" Irrigation Meter, 635 Shearwater Pkwy
8	CDD Electric Meter #5, 8755 Shearwater Pkwy
9	CDD Electric Meter #4, 1121 Kayak Club Way
10	CDD Monthly Irrigation Clock
11	CDD Electric Meter #6, 256 Kayak Club Way
12	HOA 2" Irrigation Meter
13	HOA 1" Irrigation Meter, 805 Glenview Ct. (Dedicated Irrigation Clock)
14	HOA 1" Irrigation Meter #175, Glenview Ct. (Dedicated Irrigation Clock)
15	CDD 2" Irrigation Meter, 228 Falls Dr.
16	CDD Electric Meter #7, 79 Falls Dr. (Phase 2A Irrigation Clock)
17	CDD Electric Meter #9, 133 Appleton Ave
18	CDD Phase 2C Irrigation Clock
19	CDD 2" Irrigation Meter, 344 Bonney Ave
20	CDD 1" Irrigation Meter, 99 Tibben Ct. (Dedicated Irrigation Clock)
21	CDD Electric Meter #11, 43 Rubywind CDD
22	CDD 2" Irrigation Meter, 1744 Shearwater Pkwy
23	CDD Electric Meter #10, 1426 Shearwater Pkwy, 2" Irrigation Meter (Phase 2C Irrigation Clock)
24	CDD 2" Irrigation Meter, 1560 Shearwater Pkwy
25	CDD Electric Meter #8, 688 Dulles Ct. A 1" Potable Meter to Serve Dog Park and Garden
26	CDD 1" Irrigation Meter, 343 Windley Dr. (Dedicated Irrigation Clock)
27	CDD 1" Irrigation Meter, 985 Windley Dr. (Dedicated Irrigation Clock)
28	CDD Electric Meter #0, 15 Shearwater Pkwy
29	CDD 1" Potable Meter 2105 Shearwater Pkwy
30	CDD 1.5" Irrigation Meter 2165 Shearwater Pkwy
31	CDD Utility - Serving Outpost Only
32	CDD 2" Irrigation Meter 2173 Shearwater Pkwy
33	CDD Electric Meter - 17 Timberhill Trail (Phase 3) Irrigation Clock
34	CDD 2" Irrigation Meter 222 Timberhill Trail
35	CDD Electric Service - 38 Rosewood Drive
36	CDD 1" Irrigation Electric Meter w/ Irrigation Clock - 204 Chalk Ct.
37	CDD 2" Irrigation Meter w/ Electric Meter w/ Irrigation Clock - 23 Calatta Dr.
38	CDD Electric Meter & Irrigation Clock - 315 Rosewood Dr.
39	CDD 2" Irrigation Meter - 42 Rosewood Dr.
40	CDD 2" Irrigation Meter - 412 Rosewood Dr.



PROSSER

August 25, 2023



TOTAL HOMES: 220

Tab 8

QUALIFICATIONS

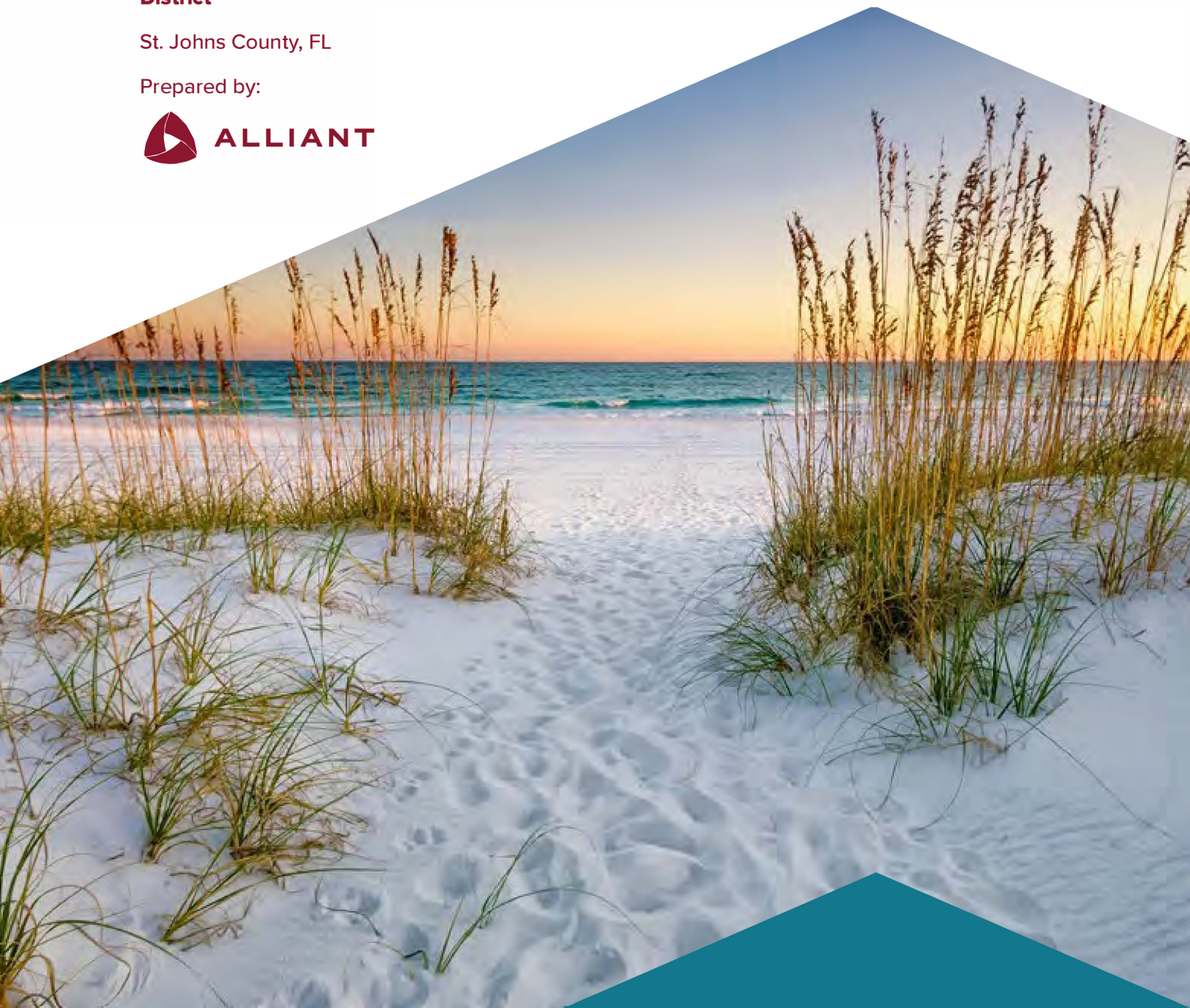
Engineering Services

Prepared for:

**Trout Creek
Community Development
District**

St. Johns County, FL

Prepared by:



September 6, 2024

District Managers Office

Melissa Dobbins

✉ mdobbins@rizzetta.com

Alliant Engineering, Inc.

10475 Fortune Parkway, Suite 101
Jacksonville, FL 32256

904.240.1351 MAIN

www.alliant-inc.com

**Building better communities with
excellence and passion.**

RE: Engineering Services for Trout Creek Community Development District

Dear Ms. Dobbins and Members of the Evaluation Committee:

Alliant Engineering, Inc. (Alliant) and our teaming partner **Meskel & Associates Engineering** (MAE) and **ECS Florida, LLC** (ECS) are pleased to submit our proposal for Engineering Services. **Curt Wimpée, PE** is Alliant's Southeast Regional Manager and will serve as the Quality Manager while **David R. Landing, PE** will serve as the Project Manager and will be the CDD's primary point-of-contact.

Alliant was founded in Minneapolis in 1995 and has grown from a company with one employee into an organization of over 177 diverse professionals and support staff. We have been providing services to clients like the Trout Creek Community Development District for over 28 years. In 2015 Alliant expanded to Jacksonville, FL to better serve its clients in the southeast region. Alliant is an S-Corporation providing a range of comprehensive services including but not limited to civil engineering, construction services, environmental services, intelligent transportation systems, landscape architecture, land survey, roadway design, structures, traffic engineering, and water resources.

Alliant's business philosophy is to keep our values of community, excellence, creating value, collaboration, being future focused, and integrity at the forefront of everything we do. Our corporate mission to Build Better Communities With Excellence And Passion is evident within our culture and our outstanding Client Service distinguishes us from other companies.

We understand you are looking for a consultant partner that is more than just a designer or engineer. You expect a partner that can lead and manage projects from concept through construction and efficiently address any challenges along the way. As your Project Manager, **David R. Landing, PE** will serve as your primary point of contact and will ensure that our team will be focused, flexible, and responsive to the needs of the CDD and its residents. We will focus on timely, honest, and open communication and delivering quality from the day the project starts all the way through project bidding, construction, and closeout.

Alliant is interested in pursuing this solicitation to continue to grow our services throughout Florida. We are excited to serve the CDD and are committed to providing the highest quality service for selected projects. Thank you for your consideration and we look forward to partnering with you. Please feel free to contact me with any questions or if you require any additional information.

Sincerely,

Alliant Engineering, Inc.



David R. Landing, PE *Project Manager*

✉ dlanding@alliant-inc.com

☎ 904.513.3218



Curt Wimpée, PE *Regional Manager,
Principal-in-Charge*

✉ cwimpee@alliant-inc.com

☎ 904.647.5383

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION (City and State)

Request for Qualifications for Engineering Services for Trout Creek Community Development District, St. Johns County, Florida

2. PUBLIC NOTICE DATE

08/01/2024

3. SOLICITATION OR PROJECT NUMBER

N/A

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

David R. Landing, PE/Project Manager

5. NAME OF FIRM

Alliant Engineering, Inc.

6. TELEPHONE NUMBER

(904) 513-3218

7. FAX NUMBER

NA

8. E-MAIL ADDRESS

dlanding@alliant-inc.com

C. PROPOSED TEAM

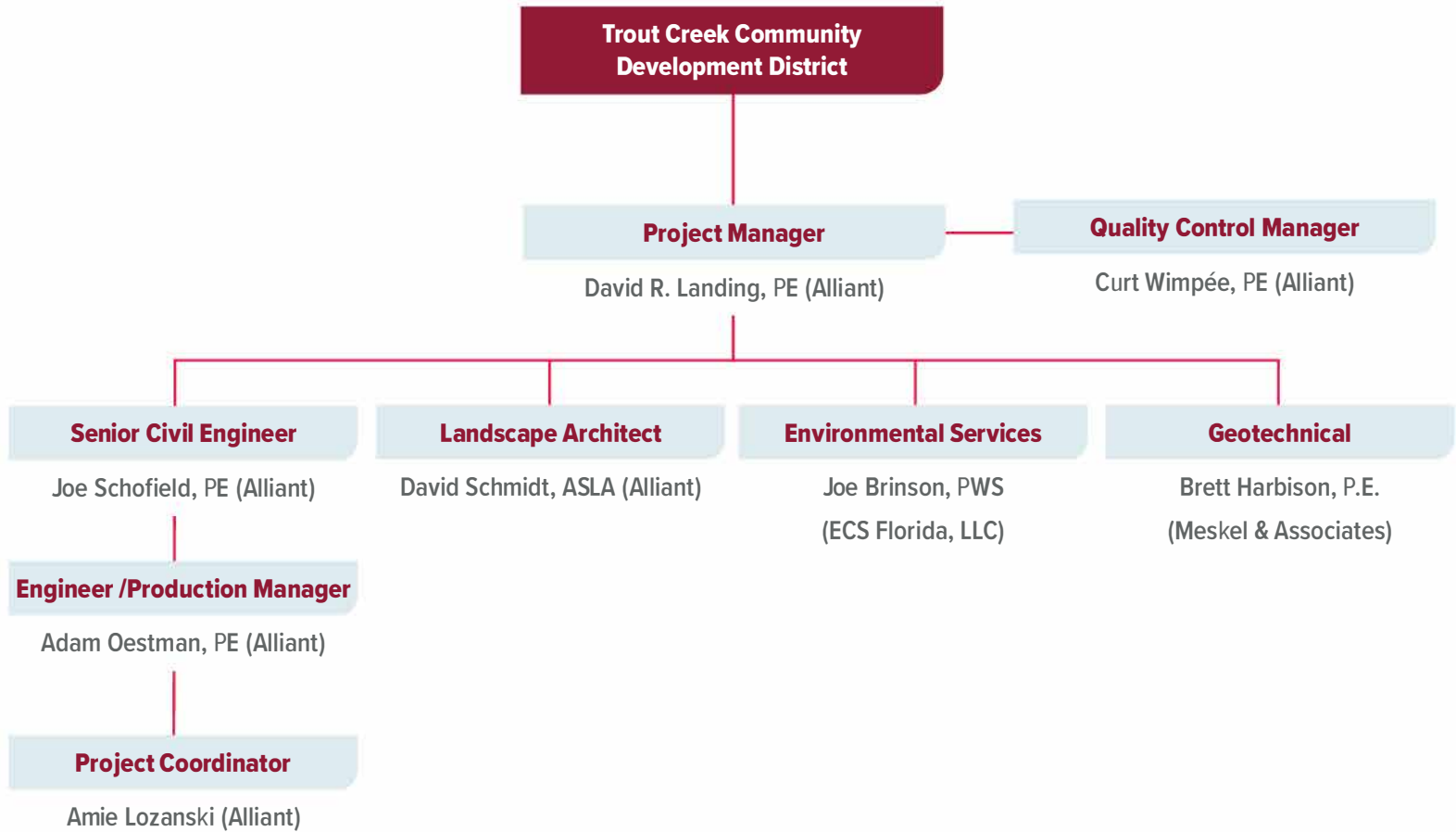
(Complete this section for the prime contractor and all key subcontractors.)

	(Check)			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V PARTNER	SUBCONTRACTOR			
a.	<input checked="" type="checkbox"/>			Alliant Engineering, Inc. <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	10475 Fortune Pkwy Ste 101, Jacksonville, FL 32256	Project Management, Civil, Landscape
b.			<input checked="" type="checkbox"/>	ECS Florida, LLC <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	11554 Davis Creek Court, Jacksonville, FL 32256	Environmental Services
c.			<input checked="" type="checkbox"/>	Meskel & Associates Engineering CHECK IF BRANCH OFFICE	3728 Philips Highway, Suite 208 Jacksonville, FL 32207	Geotechnical Services
d.				Alliant Florida, Inc. (A wholly owned subsidiary of Alliant Engineering, Inc.) <input checked="" type="checkbox"/> CHECK IF BRANCH OFFICE	10475 Fortune Pkwy Ste 101, Jacksonville, FL 32256	Land Surveying
e.				 CHECK IF BRANCH OFFICE		
f.				 CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

(Attached)

Exhibit 1. Organization Chart



E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Curt Wimpée, PE	13. ROLE IN THIS CONTRACT Quality Control Manager	14. YEARS EXPERIENCE	
		a. TOTAL 28	b. WITH CURRENT FIRM 8

 15. FIRM NAME AND LOCATION (City and State)
 Alliant Engineering, Inc. (Jacksonville, FL)

16. EDUCATION (Degree and Specialization) B.S. Civil Engineering, University of Minnesota	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in Florida (79764); Minnesota (40487) Georgia; (031340); N. Carolina (053415); S. Carolina (41355); Tennessee (125610)
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 18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)
 Curt is a Vice President at Alliant and has 28 years of experience in municipal engineering, land development and transportation. Curt's experience includes localized and regional utility extensions, lift stations, City and DOT roadway reconstructions and new roadways, MOT plans, signage and striping plans, concrete and asphalt pavement design, storm water management systems, regional drainage studies, residential mixed use, and large-scale commercial developments.

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
a. CITY ENGINEER (CONSULTANT) FOR BUNNELL, FL	ONGOING	NA
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Performed as Engineer of Record for numerous City infrastructure projects. Projects included roadway paving/assessment/rehabilitation/replacement, stormwater system design and modeling, watermain (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design/rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentations and representation. Public messaging and interaction.		
b. CITY ENGINEER (CONSULTANT) FOR FLAGLER BEACH, FL	ONGOING	NA
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Performed as Engineer of Record for numerous City infrastructure projects. Projects included roadway paving/assessment/rehabilitation/replacement, stormwater system design and modeling, watermain (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design/rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentations and representation. Public messaging and interaction.		
c. CIVIL ENGINEER FOR MENDOTA HEIGHTS, MN	2000	NA
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Performed as Engineer of Record for numerous City infrastructure projects. Projects included roadway paving/assessment/rehabilitation/replacement, stormwater system design and modeling, watermain (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design/rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentations and representation. Public messaging and interaction.		
d. CITY ENGINEER (CONSULTANT) FOR TWO HARBORS, MN	2014	NA
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE City Engineer performing all aspects of design for City improvement projects. Representative projects included approximately 6 miles of roadway and utility reconstruction for rural to urban street reconstructions. Tasks included complete corridor survey of projects, design, cost estimating, bidding and award, and full-time construction inspection.		
e. CITY ENGINEER (CONSULTANT) FOR SCANLON, MN	2014	NA
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Performed as Engineer of Record for numerous City infrastructure projects. Projects included roadway paving/assessment/rehabilitation/replacement, stormwater system design and modeling, watermain (potable and reclaim) extensions/rehabilitation/replacements, sanitary sewer design/rehabilitation. Cost estimating and engineering reports associated with all aspects of these infrastructure projects. City Council presentations and representation. Public messaging and interaction.		

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

12. NAME Joe Schofield, PE	13. ROLE IN THIS CONTRACT Senior Civil Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 21	b. WITH CURRENT FIRM 2.5

15. FIRM NAME AND LOCATION *(City and State)*
 Alliant Engineering, Inc. (Jacksonville, FL)

16. EDUCATION <i>(Degree and Specialization)</i> MBA St. Leo University B.S. Civil Engineering, University of North Florida	17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer in Florida (69219)
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18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
 Mr. Schofield is a Senior Engineer with 18 years of experience in civil design and construction oversight. He has provided design, review, and/or management of hundreds of public and private roadway and site development projects in the southeast United States. He has partnered with dozens of State Agencies and local communities to advance a wide variety of projects to improve transportation infrastructure across the continental United States.

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> SHADOW CREST AT ROLLING HILLS CDD (PHASES 3B & 3C), GREEN COVE SPRINGS, CLAY COUNTY, FL.	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> 2023
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> <input checked="" type="checkbox"/> Check if project performed with current firm a. Mr. Schofield assisted the CDD to secure electrical and landscape maintenance easements. He also reviewed all contractor, vendor, and supplier invoice and pay application to help ensure proper use of the bond funds. Scope included cost estimating and writing the Engineer's Report for Shadow Crest phase of the District full planned build-out.		

(1) TITLE AND LOCATION <i>(City and State)</i> BEACHVIEW COVE SUBDIVISION, ORMOND BEACH, VOLUSIA COUNTY, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> NA
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> <input checked="" type="checkbox"/> Check if project performed with current firm b. Project manager and engineering overseeing design and permitting for a 28-lot single-family subdivision with private lift station on A-1-A adjacent the Atlantic Ocean. All entitlements received and construction underway. Project includes a planned FPL power pole relocation, work within the coastal construction control line (CCCL), and coordination of turtle friendly street lighting design.		

(1) TITLE AND LOCATION <i>(City and State)</i> PONCE PRESERVE SUBDIVISION, PALM COAST, FLAGLER COUNTY, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> NA
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> <input checked="" type="checkbox"/> Check if project performed with current firm c. Project manager and engineering overseeing design and permitting for a 74-lot single-family subdivision. All entitlements have been received and construction start date undetermined.		

(1) TITLE AND LOCATION <i>(City and State)</i> RYAN'S LANDING SUBDIVISION, PALM COAST, FLAGLER COUNTY, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> NA
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> <input checked="" type="checkbox"/> Check if project performed with current firm d. Project manager and engineering overseeing design and permitting for a 95-lot single-family subdivision. All entitlements have been received and construction start date undetermined.		

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> <input type="checkbox"/> Check if project performed with current firm e.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Adam Oestman, PE	13. ROLE IN THIS CONTRACT Engineer/ Production Manager	14. YEARS EXPERIENCE	
		a. TOTAL 6	b. WITH CURRENT FIRM 3

 15. FIRM NAME AND LOCATION (City and State)
 Alliant Engineering, Inc. (Jacksonville, FL)

16. EDUCATION (Degree and Specialization) B.S. Civil Engineering Technology, Murray State University	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Engineer in Florida (98440)
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 18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)
 Mr. Oestman has more than six years of experience in the design and construction of private infrastructure projects. He has worked on numerous developments and infrastructure improvements for commercial, medical, municipal, and residential projects around the country. Typical project requirements are land acquisition contract review, site assessment, land planning, development cost analysis, scheduling, approval coordination preparation of contract documents, and construction administration.

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
CITY OF DELAND RECLAIM MAIN EXTENSION, DELAND, FL	2023	NA
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm a. Lead design engineer preparing the construction documents for a +-6000 LF Reclaim main extension.		
SHADOW CREST AT ROLLING HILLS CDD SINGLE FAMILY SUBDIVISION, GREEN COVE SPRINGS, FL	2021	ONGOING
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm b. Lead design engineer preparing the construction documents for a 247 single-family residential subdivision, as well as associated construction administration throughout the project.		
SAWMILL BRANCH AT PALM COAST PARK CDD - MULTIPLE PHASES, PALM COAST, FL	2023	
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm c. Lead design engineer preparing the construction documents for multiple single-family residential subdivision phases totaling over 1000 lots.		
SPRING LAKE AT PALM COAST PARK CDD – MULTIPLE PHASES, PALM COAST, FL	2022	ONGOING
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm d. Preparing the construction documents, cost-estimates, and associated construction administration for multiple single-family residential subdivision phases for a total of 421 lots.		
HYMON CIRCLE DRAINAGE IMPROVEMENTS – CITY OF BUNNELL, FL	2023	
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE <input checked="" type="checkbox"/> Check if project performed with current firm e. Design engineer preparing the construction documents for a two phase project in the City of Bunnell, including +-2000 LF of road-side drainage improvements, as well as +-3000 LF of existing drainage ditch improvements.		

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

12. NAME David Schmidt, ASLA	13. ROLE IN THIS CONTRACT Landscape Architect	14. YEARS EXPERIENCE	
		a. TOTAL 16	b. WITH CURRENT FIRM 1 Year

 15. FIRM NAME AND LOCATION *(City and State)*
 Alliant Engineering, Inc. (Jacksonville, FL)

16. EDUCATION <i>(Degree and Specialization)</i> B.S. Landscape Architecture, University of Arkansas, Minor in Horticulture	17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> ASLA; Currently pursuing licensure as a Landscape Architect in Florida in 2023
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 18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
 Mr. Schmidt has more than 16 years of experience in the fields of land development planning, landscape architecture, urban design, and project management and is the Director of Landscape Architecture at Alliant. His primary responsibilities include project management, regulatory approvals, site layout and design, construction documentation, regional and community planning, and graphic design.

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i> REVERIE AT TRAILMARK, ST. AUGUSTINE, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2020	CONSTRUCTION <i>(If applicable)</i> 2023
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> Check if project performed with current firm a. Reverie at Trailmark, St. Augustine, FL — served as the project manager and designer responsible for the neighborhood entry, common area, pocket parks, beer garden, dog park, and amenities at the clubhouse. Reverie is a 55+ Master Planned Community located in St. Augustine Florida permitted as a Community Development District developed by Dream Finders Homes, LLC. Reverie consists of 487 class A single family homes, and 4,600 SF Neighborhood Clubhouse.		

(1) TITLE AND LOCATION <i>(City and State)</i> SWEETGRASS, ST. MARY'S, GA	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> X Check if project performed with current firm b. Served as the project manager and designer responsible for the neighborhood entry, common area, pocket parks, beer garden, dog park, and amenities at the clubhouse. Sweetgrass is a 150 Acre Master Planned Community located in St. Mary's Georgia developed by Tierra Linda Development, LLC. Sweetgrass consists of 312 class A multifamily units, 194 townhomes, 143 single family homes, and 212,600 SF of commercial. The Sweetgrass project will end up as home to almost 650 families in walkable, mixed-use neighborhoods that provide not only housing but places for working, shopping, recreation, and civic engagement.		

(1) TITLE AND LOCATION <i>(City and State)</i> BRADENTON RIVERWALK, BRADENTON, FL	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES 2012	CONSTRUCTION <i>(If applicable)</i> 2012
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> Check if project performed with current firm c. My team was responsible for various project components, such as data collection, landscape design, color renderings and 3D modeling for the master plan. Kimley-Horn completed the master planning process for the 1.5-mile-long riverfront area in Bradenton known as the Riverwalk. Services included a grants/funding analysis, master planning, public involvement, design development, and stakeholder coordination. Unanimous approval was given from the Bradenton City Council with the preparation of construction documents and permitting drawings.		

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> Check if project performed with current firm d.		

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.) AND SPECIFIC ROLE</i> Check if project performed with current firm e.		

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

12. NAME David Landing, PE	13. ROLE IN THIS CONTRACT Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL 27	b. WITH CURRENT FIRM Less than 1 Year

15. FIRM NAME AND LOCATION *(City and State)*
 Alliant Engineering, Inc. (Jacksonville, FL)

16. EDUCATION <i>(Degree and Specialization)</i> BS, Civil Engineering, University of North Florida (UNF) AS, Civil Engineering Technology, Savannah Technical College	17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer in Florida (80483) Professional Engineer in Georgia (PE049527) Professional Engineer in South Carolina (41102)
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18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
 Mr. Landing is a Senior Civil Engineer with over 27 years of experience in pipelines and trenchless design with experience working on a variety of projects across the United States with a focus on water and wastewater projects in Northeast Florida. His design experience includes water and wastewater treatment facilities, pressure and gravity pipelines, civil site design, stormwater design, with emphasis on large diameter pipelines and trenchless installations. His experience in pipeline design includes feasibility studies, design and construction support, design calculations, and drawing production.

19. RELEVANT PROJECTS

a.	(1) TITLE AND LOCATION <i>(City and State)</i> 16TH STREET RECLAIMED WATER MAIN, SJCUD, ST AUGUSTINE, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2013	CONSTRUCTION <i>(If applicable)</i> 2013
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Mr. Landing served as pipeline design engineer for approximately 7,600 LF of 4-inch to 16-inch water main, force main, reclaimed water main, and gravity sewer pipelines installed by open-cut. The project also included approximately 550 LF of 10-inch reclaimed water main installed by HDD adjacent to sensitive park areas of historic St. Augustine and FDOT ROW. Mr. Landing performed HDD design calculations, laid out the geometry for the project alignment, helped prepare construction drawings, and coordinated with the design sub-contractors on the project. <p style="text-align: right;"><small>Check if project performed with current firm</small></p>		
b.	(1) TITLE AND LOCATION <i>(City and State)</i> SUNSHINE 16 (PS 306) AND FORCE MAIN EXTENSION, SJCUD, ST AUGUSTINE, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2015	CONSTRUCTION <i>(If applicable)</i> 2015
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Mr. Landing served as pipeline design engineer for approximately 1,500 lf of 4-inch force main. As part of the overall system improvements, the new force main redirected flow from the Sunshine 16 Pump Station to a separate discharge location. The project included three HDD installations to minimize impacts to the roadway and pedestrian traffic patterns as well as the adjacent residential neighborhood. Mr. Landing performed HDD design calculations, laid out the geometry for the alignments, helped prepare construction drawings and associated contract documents, and worked with the contractor for HDD installations to implement best construction practices for design of the project. <p style="text-align: right;"><small>Check if project performed with current firm</small></p>		
c.	(1) TITLE AND LOCATION <i>(City and State)</i> SR 207 WATER MAIN EXTENSION – PHASE III, SJCUD, ST JOHNS COUNTY, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> 2023
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE For the above referenced project David served as QA/QC engineer and site construction inspector for the design and construction of 2,900 LF of 24-inch PVC water main within St Johns County Utility Department (SJCUD) easements and Florida Department of Transportation (FDOT) Right-of-Ways (ROW). The project also consisted of a 42-inch steel cased jack and auger bore crossing of FDOT's State Route (SR) 206 and a 30-inch HDPE horizontal directional drill (HDD) crossing of the Florida Department of Transportation's (FDOT) Interstate 95. Permitting was required by FDOT and Florida Department of Environmental Protection (FDEP) for wetlands crossings and impacts. For this project I personally reviewed the construction drawings at various project milestones for constructability and to ensure the project met client specifications. I also reviewed contractor submittals for materials and construction methods and performed on-site inspection of installation of the water main, wet tapping for connection to the existing water main and the horizontal direction drill installation under I-95. <p style="text-align: right;"><small>Check if project performed with current firm</small></p>		
d.	(1) TITLE AND LOCATION <i>(City and State)</i> HASTINGS WTP TO SR-207 12-INCH WATER TRANSMISSION MAIN, SJCUD, HASTINGS, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2024	CONSTRUCTION <i>(If applicable)</i> 2024
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE David served as the project manager, engineer of record, and senior pipeline design engineer for approximately 4,650 linear feet of 12-inch PVC transmission water main installed by open-cut trenching, along with associated valving, hydrants, fittings, and appurtenances. The project also included approximately 2,700 linear feet of 16-inch HDPE water main installed through three separate HDD trenchless installations. Project challenges included navigating road corridors with narrow rights-of-way, which were shared with an FPL high-voltage transmission overhead powerline and coordinating proposed and temporary construction easements with property owners. David laid out the geometry for the project alignment, assisted in preparing construction drawings, and coordinated with survey and geotechnical exploration subcontractors. <p style="text-align: right;"><small>Check if project performed with current firm</small></p>		
e.	(1) TITLE AND LOCATION <i>(City and State)</i> CWRF TRANSMISSION MAIN BYPASS AND REDUNDANCY CONCEPTUAL PLAN, ECUA, PENSACOLA, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2023	CONSTRUCTION <i>(If applicable)</i> 2023
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE For the above referenced project David served as pipelines engineer for the route planning, feasibility and constructability input to add redundancy to an existing 3,500 LF of 30-inch, 10,050 LF of 42-inch, 53,500 LF of 48-inch and 5,200 LF of 54-inch large diameter DI transmission force main transporting sewerage from ECUA's Main Street Water Plant situated along Pensacola Bay to ECUA's Chemstrand Treatment Plant on the north of Escambia County. For this project I personally participated in team meetings, helped with route selection, made recommendations in support of and produced route planning sketches for the project. I also investigated and made recommendations for bypass points of connection between the various force main segments. <p style="text-align: right;"><small>Check if project performed with current firm</small></p>		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Joe Brinson, PWS	13. ROLE IN THIS CONTRACT Environmental Senior Project Manager	14. YEARS EXPERIENCE	
		a. TOTAL 27	b. WITH CURRENT FIRM 2

 15. FIRM NAME AND LOCATION (City and State)
 ECS Florida, LLC - Jacksonville, FL

16. EDUCATION (Degree and Specialization) B.S. Forest Resource Management/Forest Biometrics, University of Georgia, Athens, GA	17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Professional Wetland Scientist
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 18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)
 Mr. Brinson is an Environmental Senior Project Manager for ECS and has more than 26 years' experience in wetland permitting, species, timber assessments, greenbelts and tree / arborist services. His responsibilities include the daily management of all phases of environmental projects to include proposal preparation and review, environmental compliance (spec/NPDES), budgeting daily and ongoing activities, preparation and review of reports, daily on-going client interaction, developing a client database, invoicing and marketing.

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (If applicable)
TOWN CENTER BOULEVARD PROPERTY, PALM COAST, FL	2023	NA
a. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager. ECS scientist completed a Ecological Diligence. The purpose of the field visit was to evaluate the site for the occurrence and/or potential for occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats. ECS Fees: \$1,850 Size: 5.09 acres. <input checked="" type="checkbox"/> Check if project performed with current firm		
DIX ELLIS, JACKSONVILLE, FL	2023	NA
b. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager. ECS scientist completed a Preliminary Wetlands Determination. The purpose of the field visit was to evaluate the site for the occurrence and/or potential for occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats. ECS Fees: \$1,500 Size: .77 acres. <input checked="" type="checkbox"/> Check if project performed with current firm		
BEAUTYREST AVENUE PROPERTY, JACKSONVILLE, FL	2022	NA
c. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager. ECS scientist completed a Ecological Due Diligence with CRAS. The purpose of the field visit was to evaluate the site for the occurrence and/or potential for occurrence of jurisdictional wetlands and/or protected wildlife species and their habitats. ECS Fees: \$6,650 Size: 3.88 acres <input checked="" type="checkbox"/> Check if project performed with current firm		
FIRST COAST EXPRESSWAY PROPERTY, MIDDLEBURG, FL	2021	NA
d. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager. ECS completed a Preliminary Wetlands Determination and Preliminary Threatened & Endangered Species Survey. The purpose of the field visit was to evaluate the site for the occurrence and/or potential for occurrence of jurisdictional wetlands and/or protected wildlife species and their habitat. ECS Fees: \$6,650 Size: 3.88 acres. <input checked="" type="checkbox"/> Check if project performed with current firm		
BAINBRIDGE NOCATEE PARKWAY PROJECT, JACKSONVILLE, FL	2021	NA
e. (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Project Manager. ECS completed a Preliminary Wetlands Determination and Preliminary Threatened & Endangered Species Survey. The purpose of the field visit was to evaluate the site for the occurrence and/or potential for occurrence of jurisdictional wetlands and/or protected wildlife species and/or habitat on the site and its relevant surroundings. ECS Fees: \$2,300 Size: 13.5 acres. <input checked="" type="checkbox"/> 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 Brett H. Harbison, P.E.	13. ROLE IN THIS CONTRACT Senior Geotechnical Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 16	b. WITH CURRENT FIRM 5

 15. FIRM NAME AND LOCATION *(City and State)*
 Meskel & Associates Engineering, PLLC, Jacksonville, Florida

16. EDUCATION <i>(Degree and Specialization)</i> B.S. Civil Engineering, Florida State University, 2007 Graduate Courses University of Central Florida	17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i> Professional Engineer, Florida P.E. 74679 Professional Engineer, Georgia PE037919
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 18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
 Certified SmartPile EDC System (User ID # 020FL0029-13), Florida Engineering Leadership Institute Graduate 2015, American Society of Highway Engineers (ASHE), North Florida, ASHE Community Outreach Chairman, TCI Young Professional of the Year 2017

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a. CITY OF JACKSONVILLE (COJ) NORTHBANK BULKHEAD REPLACEMENT, JACKSONVILLE, FL (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Geotechnical Engineer responsible for coordinating the geotechnical exploration to replace the existing bulkhead along the northern bank of the St. Johns River in downtown Jacksonville extending approximately between the Fuller Warren bridge and Liberty Street. The project will include constructing a new bulkhead wall in front (waterside) of the existing bulkhead and installing anchors through the existing bulkhead. MAE's scope of work included land and waterside Standard Penetration Test (SPT) borings, rock coring, laboratory testing, and engineering analysis for the design and construction of the new bulkhead and anchors. (Contract Value: \$384,800)	2020	
b. CITY OF JACKSONVILLE SIDEWALKS AND PEDESTRIAN IMPROVEMENTS, JACKSONVILLE, FL (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Geotechnical Project Manager. MAE's services for projects under this contract consist of geotechnical exploration and engineering analysis for tasks such as new sidewalks, drainage improvements, culvert extensions and replacement, and retaining walls. Typically, the geotechnical exploration included mobilizing our truck-mounted drill rig to City roads and highways. Following subsurface exploration, laboratory testing, and geotechnical engineering analysis, MAE provided geotechnical recommendations and site preparation recommendations. These recommendations included clearing and stripping; temporary groundwater control; soil parameters for culvert design; excavation protection; and structural backfill and compaction of structural backfill. (Contract Value \$128,740)	2020	
c. LONNIE MILLER SR. REGIONAL PARK STRUCTURES & PEDESTRIAN TRAIL, JACKSONVILLE, FL (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Geotechnical/Soils Engineer. Park improvements proposed for this park included multiple new courts, multi-use fields, playgrounds, pavilions, new parking areas, elevated boardwalks, restroom and concession facilities, 2-story concrete scorer's building and 2,700 linear feet of asphalt surfaced pedestrian trail. Geotechnical explorations were performed. Reporting was presented and included design recommendations for shallow foundations, groundwater control and underdrain recommendations for field areas, and recommendations for construction of asphalt pavement base and structural courses for the trail system. Site preparation and earthwork recommendations included clearing and stripping, removal and replacement of deleterious soils/debris encountered, temporary groundwater control, and placement/compaction of fill and backfill soils. (Contract Value: \$37,800)	2018	
d. FDOT DISTRICT 2, I-95 NASSAU RIVER BRIDGE IMPROVEMENTS, DUVAL/ NASSAU COUNTY LINE, FL (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Foundation/Geotechnical Engineer of Record (GEOR)/Project Manager responsible for field coordination, laboratory shear strength testing, rock core strength testing, and geotechnical analyses to support design and construction of non-redundant drilled shafts to support crutch bents proposed for the existing I-95 north and southbound bridges. Brett directed field crews and staff in performing 24 Standard Penetration Test (SPT) borings in tidally inundated project area using amphibious and spud barge platforms. Borings were advanced to depths of 125 feet below the river mudline. Static axial shaft capacities were estimated to determine anticipated shaft tip elevations. Engineering reports were prepared including drilled shaft analyses, soil parameter recommendations for lateral analyses, and shaft installation/construction recommendations. (Contract Value: \$670,825)	2021	
e. MONCRIEF PEDESTRIAN BRIDGE SPAN REPLACEMENT, JACKSONVILLE, FL (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Senior Engineer responsible for the geotechnical exploration, laboratory testing, and engineering analysis for the pedestrian bridge. The main span and extended ramps will be supported on 54-inch non-redundant drilled shafts. The existing bridge is approximately 70 to 75 feet long and the replacement bridge will be of similar length. (Contract Value \$14,000 est.)	2022	

**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

1

21. TITLE AND LOCATION <i>(City and State)</i> Shadow Crest at Rolling Hills CDD (Phases 3B & 3C), GCS, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2023	CONSTRUCTION (If applicable) 2023

23. PROJECT OWNER'S INFORMATION

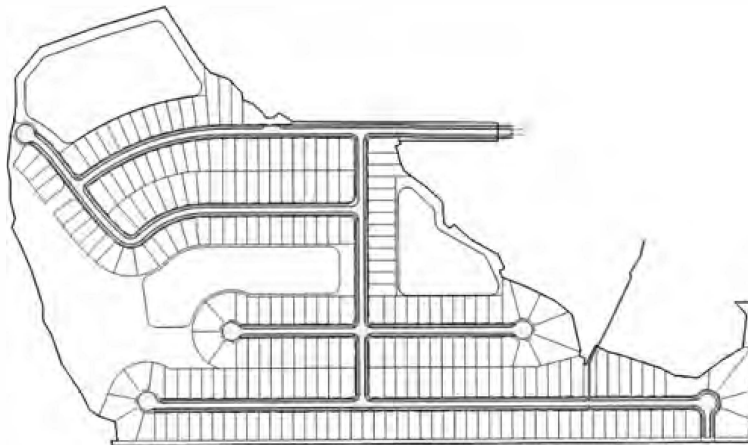
a. PROJECT OWNER Rolling Hills CDD	b. POINT OF CONTACT NAME Marilee Giles	c. POINT OF CONTACT TELEPHONE NUMBER (904) 940-5850 x412
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

CDD constructed by bond issuance infrastructure to support a 247-lot single-family platted phase of the community. Joe Schofield is the acting District Engineer for this part of the District, who is also the Engineer of Record.

Project required coordination with the primary CDD Engineer to coordinate ongoing construction of a prior phase adjacent Shadow Crest. Construction ran concurrently, so both Engineer's attended each monthly Board meeting to give Engineer's updates on each respective project. The prior phase included construction of a lift station to receive effluent from both projects.

Mr. Schofield assisted the CDD to secure electrical and landscape maintenance easements. He also reviewed all contractor, vendor, and supplier invoice and pay application to help ensure proper use of the bond funds. Scope included cost estimating and writing the Engineer's Report for Shadow Crest phase of the District full planned build-out.


25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b.	(1) FIRM NAME Alliant Florida, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Land Surveying
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
g.	(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

2

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

Spring Lake Subdivision

22. YEAR COMPLETED

 PROFESSIONAL SERVICES
 2022

 CONSTRUCTION (If applicable)
 NA

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Sunbelt Land Management

b. POINT OF CONTACT NAME

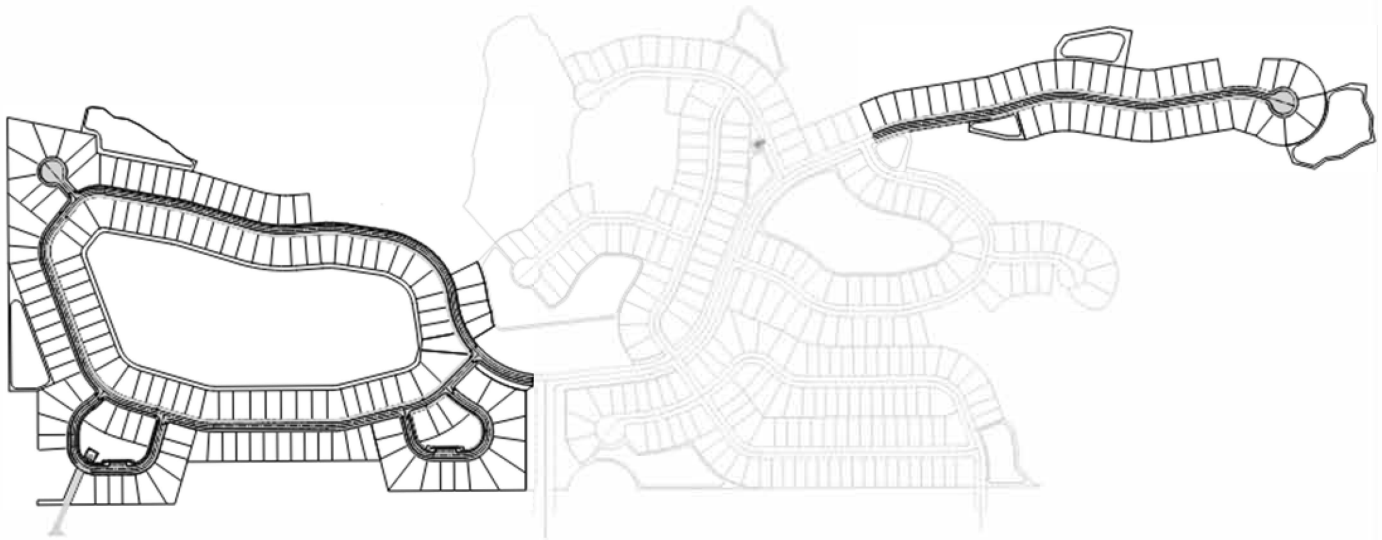
Ken Belshe

c. POINT OF CONTACT TELEPHONE NUMBER

(386) 986-2411

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

Engineer of Record for complete design and permitting of 421 unit CDD residential subdivision. Provided all aspects of oversight and design. Provided Certified Engineer's Report including cost estimating for Palm Coast Park Community Development District (CDD).


25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.	Alliant Engineering, Inc.	Jacksonville, FL	Project Engineer
b.	Alliant Florida, Inc.	Jacksonville, FL	Land Surveying
c.			
d.			
e.			
g.			

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 <div style="text-align: center; font-size: 24pt;">3</div>
21. TITLE AND LOCATION <i>(City and State)</i> Bunnell Westside Sewer Improvements - Phase 1, Bunnell, FL		22. YEAR COMPLETED PROFESSIONAL SERVICES 2020 CONSTRUCTION (If applicable) 2020

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER City of Bunnell	b. POINT OF CONTACT NAME Dustin Vost	c. POINT OF CONTACT TELEPHONE NUMBER (386) 437.7515
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Alliant prepared and submitted a St. Johns River Water Management District REDI Grant Application on behalf of the City of Bunnell, FL. The application was ranked #1 by the SJRWMD. The project consisted of sanitary sewer CIPP lining, lift station upgrades, and regional storm sewer and swale improvements to address ongoing flooding issues in this Deen Road neighborhood.


25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Alliant Engineering, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Project Engineer
b.	(1) FIRM NAME Alliant Florida, Inc.	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Land Surveying
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
g.	(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

4

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

Flagler Beach Slip Lining Rehab, Flagler Beach, FL

22. YEAR COMPLETED

 PROFESSIONAL SERVICES
 2020

 CONSTRUCTION (If applicable)
 2020

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

City of Flagler Beach

b. POINT OF CONTACT NAME

Lee Richards

c. POINT OF CONTACT TELEPHONE NUMBER

(386) 517-2000 ext. 248

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

Alliant prepared and submitted a St. Johns River Water Management District REDI Grant Application on behalf of the City of Bunnell, FL. The project was funded by the SJRWMD and Alliant performed a 1.1-mile route survey along SR 100 (Moody Blvd) in the City of Bunnell from Grand Reserve Parkway to North Palmetto Street. This required deed research for all adjacent properties along the route including FDOT right-of-way. Alliant also prepared design and bid Documents for a reclaimed water main.


25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.	Alliant Engineering, Inc.	Jacksonville, FL	Project Engineer
b.	Alliant Florida, Inc.	Jacksonville, FL	Land Surveying
c.			
d.			
e.			
g.			

<p>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></p>		<p>20. EXAMPLE PROJECT KEY NUMBER</p> <p style="text-align: center;">5</p>		
<p>21. TITLE AND LOCATION <i>(City and State)</i> Sweetgrass Apartments (Phase 1) Enhanced Landscape Saint Marys, GA</p>		<p>22. YEAR COMPLETED</p> <table border="1"> <tr> <td>PROFESSIONAL SERVICES 2023</td> <td>CONSTRUCTION (If applicable) NA</td> </tr> </table>	PROFESSIONAL SERVICES 2023	CONSTRUCTION (If applicable) NA
PROFESSIONAL SERVICES 2023	CONSTRUCTION (If applicable) NA			

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Sweetgrass Acquisition LLC	b. POINT OF CONTACT NAME Ron Buckley	c. POINT OF CONTACT TELEPHONE NUMBER (904) 247-5334
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Sweetgrass is a 150 Acre Master Planned Development located in St. Mary's Georgia for Tierra Linda Development, LLC. Sweetgrass consists of 312 class A multifamily units, 194 townhomes, 143 single family homes, and 212,600 SF of commercial. Working in collaboration with the client, architect, and interior designer, the Sweetgrass project will end up as home to almost 650 families in walkable, mixed-use neighborhoods that provide not only housing but places for working, shopping, recreation, and civic engagement. My team's services included project management for the design of the enhanced landscape, irrigation, neighborhood clubhouse amenity area which included the clubhouse pool deck, shade structures, outdoor kitchen, landscape architecture, hardscape, site electrical engineering (managed sub), mail kiosk, design of the neighborhood entry monument, security gate, dog park and all site civil design with permitting.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
a.	Alliant Engineering, Inc.	Jacksonville, FL	Project Engineer
b.	Alliant Florida, Inc.	Jacksonville, FL	Land Surveying
c.			
d.			
e.			
g.			

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 <div style="text-align: center; font-size: 24pt;">6</div>
21. TITLE AND LOCATION <i>(City and State)</i> Trout Creek Community Development District, St. Augustine, FL		22. YEAR COMPLETED PROFESSIONAL SERVICES 2023 CONSTRUCTION (If applicable) NA

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Trout Creek CDD	b. POINT OF CONTACT NAME Melissa Dobbins	c. POINT OF CONTACT TELEPHONE NUMBER (904) 436.6270
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

ECS completed an Arboriculture Assessment for the landscape tree decline predominantly live oaks with a few magnolias. ECS understood the trees started to decline approximately two years after they were planted. ECS scope of work included assessing the current condition of landscaping trees along Shearwater Parkway, determine whether conditions require removal and recommend an appropriate course of action for remediation. Investigative methods used were visual inspection of roots and tree, soil ph and nutrient analysis, root excavation, general leaf density analysis, irrigation water ph testing and bulk density testing of the soil.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME ECS Florida, LLC	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Environmental
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
g.	(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 <i>(City and State)</i> <i>Tapestry Westland Village, Jacksonville, FL</i>	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2019	CONSTRUCTION (If applicable) NA

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Arlington Properties	b. POINT OF CONTACT NAME Trey Barnes	c. POINT OF CONTACT TELEPHONE NUMBER (205) 397-6834
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24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

The subject project is located at the intersection of Collins Road at Plantation Bay Drive in Jacksonville, Florida. This task order included performing a geotechnical exploration, laboratory testing program, and engineering analysis to assist the design team with the design of the twelve 3-story residential buildings, a single-story clubhouse, lift station, pool, and dog park. Our analysis included providing recommendations for the construction of shallow foundations and a wet well structure.

Borings: 16 SPT, 16 Hand Augers

Total Feet: 533 LF (9 SPT to 30 feet, 4 SPT to 20 feet, 1 SPT to 32 feet, 1 SPT to 25 feet, 5' sampling intervals) (16 6 foot Hand Augers 1 foot sampling intervals)

Samples: 223

LABORATORY TESTING PROGRAM

Index Testing: 26 samples 26 -200, 26 MC, 4 OC, 4 AL

Contract Value: \$12,000

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Meskel & Associates	(2) FIRM LOCATION <i>(City and State)</i> Jacksonville, FL	(3) ROLE Geotechnical Services
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
g.	(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 <i>(From Section E, Block 12)</i>	27. ROLE IN THIS CONTRACT <i>(From Section E, Block 13)</i>	28. EXAMPLE PROJECTS LISTED IN SECTION F <i>(Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)</i>												
		1	2	3	4	5	6	7	8	9				
David R. Landing, PE	Project Manager													
Curt Wimpée, PE	Quality Control Manager	X	X	X	X	X								
Joseph Schofield, PE	Senior Civil Engineer	X		X	X									
Adam Oestman, PE	Engineer/ Production Manager													
David Schmidt, ASLA	Landscape Architect					X								
Joe Brinson, PWS	Environmental Senior Project Manager							X						
Brett Harbison, PE	Senior Geotechnical Engineer								X					

29. EXAMPLE PROJECTS KEY

NUMBER	TITLE OF EXAMPLE PROJECT <i>(From Section F)</i>	NUMBER	TITLE OF EXAMPLE PROJECT <i>(From Section F)</i>
1	Shadow Crest at Rolling Hills CDD (Phase 3B&C)	6	Trout Creek Community Development District
2	Spring Lake Subdivision	7	Tapestry Westland Village
3	Bunnell Westside Sewer	8	
4	Flagler Beach CIPP	9	
5	Sweetgrass Apartments (Phase 1) Enhanced Landscape	10	

H. ADDITIONAL INFORMATION

To fully address the criteria requested in the RFQ, we offer the following additional information. This further demonstrates Alliant Engineering's expertise and capabilities to perform all work that is anticipated under this contract as District Engineer for the CDD.

ABILITY AND ADEQUACY OF PROFESSIONAL PERSONNEL

Alliant Engineering, Inc. (Alliant) offers professional design and project management services in Municipal Infrastructure and Land Development, Transportation, Traffic Engineering, Design-Build, Structural, Landscape Architecture, and Surveying. Alliant's backbone is a professionally diverse group of talented professionals dedicated to providing quality design, management, and construction services. Established in 1995, Alliant has provided 29 years of professional engineering services to a broad range of public and private clients. Our collaborative team approach and integrated management style allows us to efficiently complete projects while providing a high level of quality. We bring value to our clients by combining unmatched civil engineering expertise, experience, and innovation.

In addition to being highly qualified for this work, we have an intricate knowledge of the infrastructure challenges within smaller municipalities. Our key staff for this project team are experts in their disciplines and well suited to provide the continuing engineering services required of your District Engineer.

At the program level, we have the following critical roles:

- **Project Manager** – Responsible for building project teams tailored to meet project goals, provide ongoing project oversight, and be the primary point of contact for the CDD. **David R. Landing, PE** was selected to be our Project Manager because, following 27 years of experience in the industry, he understands how to make CDD projects successful. As Project Manager, David will be handling the District Meetings and managing the construction/engineering services.
- **Discipline Lead** – Responsible for identifying team members for individual work orders and ensuring uniformity in format and standards between projects. This individual is also an expert technical resource for project teams. These individuals are identified in the resumes in Section E of the SF330 Form.
- **Quality Control Manager** – Responsible for ensuring all team members are trained in the Alliant Quality Management Process and verifying that quality processes are followed on individual projects. **Curt Wimpée, PE**, will be our Quality Manager.

Alliant's proposed team of professionals provides the CDD with a comprehensive understanding and approach to meet (and exceed) the CDD's objectives and goals. Our corporate mission to build better communities with excellence and passion is evident within our culture and separates us from the rest.

Additionally, As part of our program for other similar clients, we have developed an internal Quality Management Plan (QMP) that defines how our team will provide quality in delivering services to the CDD. As Project Manager, David will work with Curt Wimpée to ensure that the process is followed for every major deliverable and milestone. Alliant's experience with the quality control process has shown that it must be part of the everyday

Our team is organized to execute work orders quickly and ensure quality and timely delivery.



David R. Landing, PE

Project Manager



Curt Wimpée, PE

Quality Manager

H. ADDITIONAL INFORMATION

CERTIFIED MBE

Alliant’s teaming partner **Meskel & Associates Engineering** (MAE) is a certified Woman-owned DBE and JSEB based in Jacksonville, FL, with additional offices in Lake City and Tampa. They specialize in geotechnical engineering, drilling, and laboratory testing services. MAE’s certifications are included at the end of the form.

WILLINGNESS AND ABILITY TO MEET TIME & BUDGET REQUIREMENTS

At Alliant, we take pride in delivering complex projects on difficult timelines. This can only be accomplished through great project management and a sound project approach. Open, honest and timely communication with the CDD, stakeholders, and potential sub-consultants is the key to project success.

We will facilitate all formal reviews in an organized and timely manner to keep the project moving forward. We will also conduct progress meetings to efficiently provide updates and to discuss particular design issues that are critical to the schedule for both the CDD and project team. Our Quality Management Plan (QMP) will be revised to be specific to each project and will be followed religiously throughout design.

For a project to be efficient, not only does the engineering and project management need to be effective but understanding the permitting agencies and maintaining those key relationships is a necessity. Alliant has performed a multitude of projects and has both the expertise of dealing with the appropriate permitting agencies as well as maintaining those relationships needed to be efficient with complex projects. Alliant has developed relationships over the years with sub-consultants as well as contractors. We have the expertise and knowledge to develop designs to help minimize cost to our clients during construction. This can be done because of our extensive knowledge of building systems and construction techniques. Anticipation of construction techniques and communication with contractors during design are key elements to an effective cost savings project approach.

Communication with the CDD

Fast-tracked projects require intense and continuous communication and collaboration with the CDD and their oversight team. Alliant will establish a draft meeting schedule

for discussion at the kickoff meeting. We envision three levels of meetings: Design Review, Over-The-Shoulder Review and Progress Meetings.

Design Review

Design review meetings will be face-to-face meetings to go over review comments at major milestones during the project. The appropriate deliverables will be submitted for CDD review. A meeting will be scheduled after the CDD’s review period to go over comments. As discussed in our QMP, every comment will be included in a Comment Response memo and the required action will be documented.

OTSR

OTSRs will be scheduled in between the major milestones. These informal design reviews will allow the CDD to be kept abreast of, and have input into the design as it is progressing. The intent of these meetings is to present “in-progress” plans to the CDD to discuss specific issues where decisions are required that may impact schedule. OSTRs may also include key stakeholders as appropriate. It is envisioned that most OTSR meetings would also be face-to-face.

Progress Meetings

We will use frequent Progress Meetings to keep the CDD’s team fully informed and involved in all aspects of the project. These meetings serve as a forum to address issues, hot topics, and identify action items that need to take place. The meetings can also serve as mini “over-the-shoulder” design reviews for portions of the project to get instant feedback from the CDD regarding particular issues. We consider these meeting to provide “collaboration on the fly”, and we use them to present all key components of the design prior to the actual submittal. This approach ensures that the CDD is part of the decision-making progress upfront, reducing the risk of surprises and potential re-work.

Most meetings will include an agenda, meeting minutes, and action item log. The minutes and action item log can be shared internally with Alliant’s Team, and with the CDD staff to inform persons not at the meeting of decisions and action items that had been identified.

In addition to regularly scheduled meetings, we will establish the systems and protocols for easy sharing of electronic files to assist with design collaboration and review.

H. ADDITIONAL INFORMATION

RECENT, CURRENT & PROJECTED WORKLOADS

Alliant is dedicated to client satisfaction which means we must honor schedule commitments. To this end, we regularly assess our workload and plan for growth by keeping our staff level above our immediate needs. This enables us to keep quality and responsiveness at the highest level. David R. Landing can allocate the support staff and resources to easily meet any schedule. A project schedule will be developed at the onset of each opportunity received from the CDD. That schedule will be developed by working in concert with the major stakeholders. The appropriate Alliant team members will then be assigned responsibilities and deadlines to produce deliverables. We will work with CDD staff for a full understanding of the scope and expectations so we can provide a service that exceeds expectations.

Alliant project managers meet each week to discuss current workload and staffing needs. We maintain a high-level project design schedule that tracks the expected level of project commitments per month compared to the available staffing. At our project manager meetings, we discuss project specific needs and upcoming deadlines to determine if the current staffing is appropriate or if changes will be required to ensure that schedules are met.

Exhibit 2 below illustrates the estimated time allotment that each of the key members can contribute at the moment. These percentages will fluctuate from week to week based on external influences, but resources will be concentrated when needed to complete specific tasks or address project needs as critical items dictate.

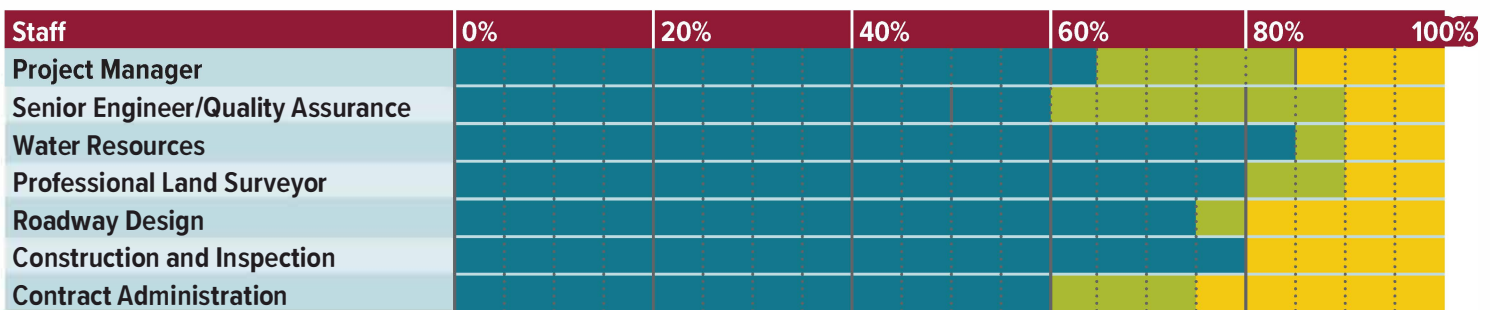
CONSULTANT'S PAST EXPERIENCE/PERFORMANCE

The Alliant Team has the experience and expertise required to provide high quality professional services to the CDD for this project. We believe the details of our proposal provide the CDD with excellent program value. We would be honored and excited to work with you on this project in a way we have done with several municipalities in the past including the following:

Alliant has been serving the Southeast Region out of our Jacksonville office since 2015. During that time, we have partnered with cities throughout Florida to address civil engineering needs through on-going contracts similar to the one referenced in the RFP. Curt Wimpée, PE is Alliant's Southeast Regional Manager with over 26 years of experience.

In 2017, Alliant was selected to provide City Wide Civil Engineering services for the City of Bunnell, FL. From the onset of services, Alliant has worked with the City of Bunnell to obtain over 2.5 million dollars of grant funding to develop their reclaim watermain infrastructure, alleviate stormwater flooding in low lying areas and cast in place pipe (CIPP) lining of their gravity sewer infrastructure. Alliant has worked diligently to provide excellent service to the City's staff during the design and construction administration of these projects. These efforts have earned their trust and confidence leading to the City's election as their City Engineer and City Surveyor respectively. We continue to consult with the City on a daily/weekly basis to support their ongoing engineering and surveying needs.

Exhibit 2. Project Schedule



● Percent Committed, ● CDD, ● Excess Availability

H. ADDITIONAL INFORMATION

That same year, Alliant was selected to provide **Professional Engineering Services to St. Johns County, FL**. Alliant is currently working with staff to target their specific project needs.

In 2018, Alliant was selected to provide **City Wide Engineering Services for the City of Flagler Beach, FL**. Alliant has worked with the City of Flagler Beach to be awarded 1 million dollars of grant funding to provide cast in place pipe (CIPP) lining for over seven miles of their gravity sewer infrastructure. Alliant continues to provide these services, and we will show through this proposal that we work hard to exceed expectations in everything we do.

In 2020, Alliant was selected to provide **Professional Engineering Services to the City of Atlantic Beach, FL**. Alliant worked with the Public Works Director to evaluate their existing maintenance building and provide recommendations and associated costs to the City Commission for either repair or replacement.

In 2023, Alliant was selected to provide **General Engineering Services to the Tison's Landing Community Development District**. In 2024, Alliant was selected for the **Ridgewood Trails, OTC, and The Trails Community Development Districts**. Alliant is thrilled to facilitate the expansion of our clients into the Community Development Districts.



GEOGRAPHIC LOCATION

Alliant's office is located on the southside of Jacksonville, Florida. Located in Duval County we are readily available to serve the needs of the Trout Creek Community Development District. The office location is important during permitting and construction to ensure timely responses.

VOLUME OF WORK PREVIOUSLY AWARDED TO CONSULTANT BY DISTRICT

Alliant Engineering, Inc. has not previously performed work for the CDD.

TECHNICAL EXPERIENCE

In addition to the requested services in the RFQ, Alliant also provides the following services:

Land Planning

Land Planning begins with our ability to understand the big picture. Our goal is to be respectful stewards of our environment, achieve the highest and best use of the land and position it for the best return on the investment. Developing a client's vision for the spatial use of a site is a passion for us. We understand that planning determines the return on investment through efficient allocation of programming, presentation of features and quality circulation. We bring experience and knowledge of navigating land use codes, writing land development guidelines and creating sustaining thriving communities.

Our Land Planning services include:

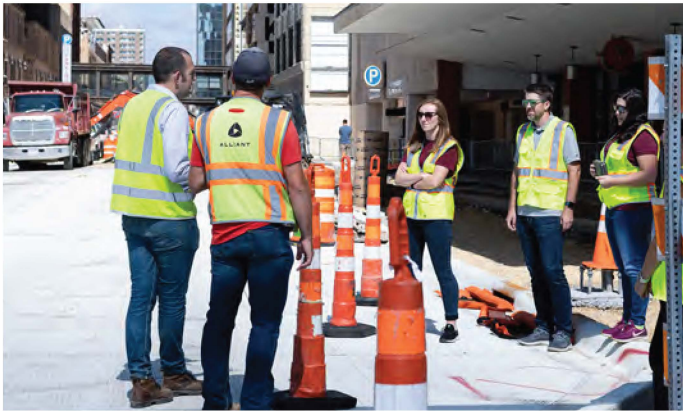
- Site Feasibility Studies
- Field Investigation & Due Diligence
- Highest & Best Use Master Planning
- Park Planning
- Urban Planning
- Mixed-use Town Centers
- Waterfront Projects

Landscape Architecture

A particular fusion happens during landscape design. In every detail, from the sense of arrival to each major gathering space and the transitions between, our passion for creating unique and engaging outdoor environments brings personality to every project.

Our Landscape Architecture services include:

- Tree Preservation & Mitigation Plan Preparation
- Landscape Code Minimum Plans
- Community Garden Design
- Hardscape Design
- Swimming Pool & Water Park Design
- Night Lighting Design
- Neighborhood Amenities
- Entry Monuments
- Parks
- Neighborhood Trails
- Streetscape Design
- Water Feature Design
- Planting
- Irrigation Design

H. ADDITIONAL INFORMATION
Construction Administration


Alliant Engineering offers Construction Administration services to developers and municipalities through the construction phase of projects we design. During this phase our team will coordinate with contractors and consultants to monitor and review the progress of construction.

Construction Administration Services

- ▶ Consultant Coordination and Project Management
- ▶ Client Representation
- ▶ Submittal Package Review
- ▶ Construction Phase Permitting
- ▶ Change Order Review and Approval

Graphic Design

Representing the identity of a project is essential to many aspects, from marketing collateral to identity monument signs and wayfinding directional signage. Our graphics department excels in color artistry, marketing presentations and community sign design with the intent to ensure the best delivery of every message to its audience.

Graphic Design Services

- ▶ Project Icons & Logos
- ▶ Neighborhood Identity Signs
- ▶ Exterior Signage
- ▶ Street & Public Signage
- ▶ Wayfinding Signage
- ▶ Promotional & Marketing Products
- ▶ Perspective Renderings

Traffic

Alliant is sought-after for delivery of large scale, complex transportation projects. Our team is dedicated to improving safety and mobility for the traveling public whether on foot, a bike, a bus, or in a motor vehicle. Our experienced and diverse traffic engineering team allows us the ability to provide a wide range of services to public and private sector clients. We have the depth and staff resources to manage a deep workload and provide the best service, responsiveness, and quality product every agency deserves. These contracts span many service areas for agencies similar to the CDD.


Traffic Services


- ▶ Traffic Design
- ▶ Traffic Sign Interconnect
- ▶ ITS
- ▶ Traffic Modeling
- ▶ Traffic Impact Studies
- ▶ Intersection Corridor Network Operations
- ▶ Traffic Signal Design
- ▶ Transportation and Traffic Studies
- ▶ Traffic Signal Timing and Arterial Analysis
- ▶ Traffic Signals and Foundations
- ▶ Traffic Counting


REFERENCES
Flagler Beach
Dave Taylor
 386.986.7158

 dtaylor@cityofflaglerbeach.com

City of Atlantic Beach
Scott Williams
 904.247.5834

 swilliams@coab.us

City of Palm Coast
Stephen Flanagan
 386.986.2354

 SFlanagan@palmcoastgov.com

City of Bloomington, MN
Kirk Roberts
 952.563.4914

 kroberts@bloomingtonmn.gov

H. ADDITIONAL INFORMATION**FIRM LICENSURE AND
PREQUALIFICATIONS**

Alliant is licensed to perform professional engineering and landscape architecture in the State of Florida and is certified with the Florida Department of State as an S-Corporation. A copy of the firm's licenses, and key staff licenses, can be found at the end of this section as **Appendix A**.

**LEGAL REQUIREMENTS AND
DISCLOSURE**

No judicial or administrative agency or qualification board has ever investigated Alliant or any of its employees. Neither Alliant nor any Alliant employee, including its engineers, has ever received any prior adverse decision or settlement relating to a violation of ethical standards.

FDOT Work Group Prequalifications

- 6.1 - Traffic Engineering Studies
- 6.2 - Traffic Signal Timing
- 6.3.1 - Intelligent Transportation Systems Analysis and Design
- 6.3.2 - Intelligent Transportation Systems Implementation
- 6.3.3 - Intelligent Transportation Traffic Engineering Systems Communications
- 7.3 – Signalization
- 8.1 - Control Surveying
- 8.2 - Design, Right of Way & Construction Surveying
- 8.4 - Right of Way Mapping

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE



32. DATE

September 6, 2024

33. NAME AND TITLE

Curt Wimpée, PE/Vice President

ARCHITECT-ENGINEER QUALIFICATIONS

1 SOLICITATION NUMBER (If any)

PART II - GENERAL QUALIFICATIONS

(If a firm has branch offices, complete for each specific branch office seeking work.)

2a. FIRM (or Branch Office) NAME Alliant Florida, Inc.			3. YEAR ESTABLISHED 2019	4. UNIQUE ENTITY IDENTIFIER 83-2802440
2b. STREET 10475 Fortune Pkwy Ste 101			5. OWNERSHIP	
2c. CITY Jacksonville			a. TYPE	
2d. STATE FL	2e. ZIP CODE 32256		b. SMALL BUSINESS STATUS	
6a. POINT OF CONTACT NAME AND TITLE Clayton Walley/Survey Manager			7. NAME OF FIRM (If Block 2a is a Branch Office)	
6b. TELEPHONE NUMBER (904) 900-3507		6c. EMAIL ADDRESS cwalley@alliant-inc.com		
8a. FORMER FIRM NAME(S) (If any)			8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER

9. EMPLOYEES BY DISCIPLINE
**10. PROFILE OF FIRM'S EXPERIENCE
AND ANNUAL REVENUE FOR LAST 5 YEARS**

a. Function Code	b. Discipline	c. Number of Employees		a. Profile Code	b. Experience	c. Revenue Index Number (see below)
		(1) FIRM	(2) BRANCH			
08	CADD Technician	5		S10	Surveying	6
38	Land Surveyor	21				
TOTAL		26				

11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number shown at right)		PROFESSIONAL SERVICES REVENUE INDEX NUMBER								
		1. Less than \$100,000	2. \$100,000 to less than \$250,000	3. \$250,000 to less than \$500,000	4. \$500,000 to less than \$1 million	5. \$1 million to less than \$2 million	6. \$2 million to less than \$5 million	7. \$5 million to less than \$10 million	8. \$10 million to less than \$25 million	9. \$25 million to less than \$50 million
a. Federal Work	1									
b. Non-Federal Work	6									
c. Total Work	6									

12. AUTHORIZED REPRESENTATIVE
 The foregoing is a statement of facts.

a. SIGNATURE 		b. DATE September 6, 2024
c. NAME AND TITLE Curt Wimpée, PE/Vice President		

ARCHITECT-ENGINEER QUALIFICATIONS

1 SOLICITATION NUMBER (If any)

PART II - GENERAL QUALIFICATIONS

(If a firm has branch offices, complete for each specific branch office seeking work.)

2a. FIRM (or Branch Office) NAME Meskel & Associates Engineering, PLLC			3. YEAR ESTABLISHED 2008	4. UNIQUE ENTITY IDENTIFIER DVZYP4E9Q3L8
2b. STREET 3728 Philips Hwy, Suite 208			5. OWNERSHIP	
2c. CITY Jacksonville			2d. STATE FL	2e. ZIP CODE 32207
6a. POINT OF CONTACT NAME AND TITLE Antoinette D. Meskel, P.E., President, Principal Engineer			a. TYPE S-Corporation	
6b. TELEPHONE NUMBER (904) 519-6990			b. SMALL BUSINESS STATUS WOSB, SB, DBE: NAICS 541330, 541380, 541920	
6c. EMAIL ADDRESS tina@meskelengineering.com			7. NAME OF FIRM (If Block 2a is a Branch Office) Meskel & Associates Engineering, PLLC	
8a. FORMER FIRM NAME(S) (If any)			8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER

9. EMPLOYEES BY DISCIPLINE
**10. PROFILE OF FIRM'S EXPERIENCE
AND ANNUAL REVENUE FOR LAST 5 YEARS**

a. Function Code	b. Discipline	c. Number of Employees		a. Profile Code	b. Experience	c. Revenue Index Number (see below)
		(1) FIRM	(2) BRANCH			
02	Administrative	6		E02	Education Facilities; Classrooms	0.5
08	CADD Technician	1		E09	Environmental Impact Studies, Assessments or	0.5
15	Construction Inspector	5		E12	Environmental Remediation	0.5
27/55	Foundation/Geotechnical Engineer	7		E13	Environmental Testing and Analysis	0.5
30	Geologist	1		H07	Highways; Streets; Airfield Paving; Parking Lots	3
48	Project Managers	5		O01	Office Buildings; Industrial Parks	0.5
58	Technicians/Analyst	6		P12	Power Generation, Transmission, Distribution	0.5
	Engineering Intern	2		R04	Recreation Facilities (Parks, Marinas, Etc.)	1.5
	Drillers	8		S04	Sewage Collection, Treatment and Disposal	1
				S05	Soils & Geological Studies; Foundations	4
				S07	Solid Wastes; Incineration, Landfill	1
				T02	Testing & Inspection Services	3
				W02	Water Resources; Hydrology; Ground Water	1
				W03	Water Supply; Treatment and Distribution	2
TOTAL		41				

11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS
 (Insert revenue index number shown at right)

a. Federal Work	4
b. Non-Federal Work	7
c. Total Work	7

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

- | | |
|---|---|
| 1. Less than \$100,000 | 6. \$2 million to less than \$5 million |
| 2. \$100,000 to less than \$250,000 | 7. \$5 million to less than \$10 million |
| 3. \$250,000 to less than \$500,000 | 8. \$10 million to less than \$25 million |
| 4. \$500,000 to less than \$1 million | 9. \$25 million to less than \$50 million |
| 5. \$1 million to less than \$2 million | 10. \$50 million or greater |

12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE 	b. DATE September 6, 2024
---	------------------------------

c. NAME AND TITLE Antoinette D. Meskel, PE, President, Principal Engineer
--

ARCHITECT-ENGINEER QUALIFICATIONS

1 SOLICITATION NUMBER (If any)

PART II - GENERAL QUALIFICATIONS

(If a firm has branch offices, complete for each specific branch office seeking work.)

2a. FIRM (or Branch Office) NAME ECS FLORIDA, LLC – Tampa			3. YEAR ESTABLISHED 2012	4. UNIQUE ENTITY IDENTIFIER MNVJKQ85HFG3
2b. STREET 4524 N. 56th Street			5. OWNERSHIP	
2c. CITY Tampa	2d. STATE FL	2e. ZIP CODE 33610	a. TYPE Limited Liability Company	
6a. POINT OF CONTACT NAME AND TITLE Rey Ruiz, PE, SI – Branch Manager			b. SMALL BUSINESS STATUS NA	
6b. TELEPHONE NUMBER (813) 302-1644			6c. EMAIL ADDRESS RRuiz1@ecslimited.com	
8a. FORMER FIRM NAME(S) (If any)			8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER

9. EMPLOYEES BY DISCIPLINE
**10. PROFILE OF FIRM'S EXPERIENCE
AND ANNUAL REVENUE FOR LAST 5 YEARS**

a. Function Code	b. Discipline	C. Number of Employees		a. Profile Code	b. Experience	c. Revenue Index Number (see below)
		(1) FIRM	(2) BRANCH			
2	Administrative	33	6	H11	Housing (Residential, Multi-Family, Apts, Condos)	8
6	Architect	2		H07	Highways, Streets, Airfield Paving, Parking Lots	7
8	AutoCAD	1		E09	Environmental Impact Studies, Assessments	7
	Construction Materials Manager	10	3	T02	Testing & Inspection Services	6
	Drillers	29	10	C10	Commercial Buildings (low rise), Shopping Centers	6
24	Environmental Scientist	19	4	W01	Warehouses & Depots	5
	Environmental Technician	2		S05	Soils & Geologic Studies, Foundations	4
	Field Technicians	94	17	H10	Hotels, Motels	4
30	Geologist	6	2	O01	Office Buildings, Industrial Parks	4
	Hydrogeologist			I01	Industrial Buildings, Manufacturing Plants	4
36	Industrial Hygiene			E02	Schools & Universities	4
	Lab Manager/Technician	14	4	A06	Airports, Terminals & Hangars, Freight Handling	4
	Professional Engineer	25	6	H09	Hospitals & Medical Facilities	4
48	Project Manager	59	25	P02	Petroleum and Fuel (Storage and Distribution)	3
	Soils Engineer			R04	Recreation Facilities (Parks, Marinas, etc.)	3
				D07	Dining Halls, Clubs, Restaurants	3
				E12	Environmental Remediation	3
				S13	Storm Water Handling & Facilities	3
				H06	Highrise, Air-Rights-Type Buildings	3
				W03	Water Supply, Treatment and Distribution	3
TOTAL		294	77			

 11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS
 (Insert revenue index number shown at right)

a. Federal Work	3
b. Non-Federal Work	9
c. Total Work	9

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

- | | |
|---|---|
| 1. Less than \$100,000 | 6. \$2 million to less than \$5 million |
| 2. \$100,000 to less than \$250,000 | 7. \$5 million to less than \$10 million |
| 3. \$250,000 to less than \$500,000 | 8. \$10 million to less than \$25 million |
| 4. \$500,000 to less than \$1 million | 9. \$25 million to less than \$50 million |
| 5. \$1 million to less than \$2 million | 10. \$50 million or greater |

12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE 	b. DATE September 6, 2024
---	------------------------------

 c. NAME AND TITLE
 Rey Ruiz, PE, SI – Branch Manager

ARCHITECT-ENGINEER QUALIFICATIONS

1 SOLICITATION NUMBER (If any)

PART II - GENERAL QUALIFICATIONS

(If a firm has branch offices, complete for each specific branch office seeking work.)

2a. FIRM (or Branch Office) NAME ECS FLORIDA, LLC – Jacksonville			3. YEAR ESTABLISHED 2017	4. UNIQUE ENTITY IDENTIFIER MNVJKQ85HFG3
2b. STREET 11554 Davis Creek Court			5. OWNERSHIP	
2c. CITY Jacksonville	2d. STATE FL	2e. ZIP CODE 32256	a. TYPE Limited Liability Company	
6a. POINT OF CONTACT NAME AND TITLE Joey Broussard, PE – Vice President			b. SMALL BUSINESS STATUS NA	
6b. TELEPHONE NUMBER (904) 880-0960		6c. EMAIL ADDRESS JBroussard@ecslimited.com		
8a. FORMER FIRM NAME(S) (If any) Ellis & Associates, Inc.			8b. YEAR ESTABLISHED 1988	8c. UNIQUE ENTITY IDENTIFIER 87-718-2006
7. NAME OF FIRM (If Block 2a is a Branch Office) ECS Florida, LLC				

9. EMPLOYEES BY DISCIPLINE
**10. PROFILE OF FIRM'S EXPERIENCE
AND ANNUAL REVENUE FOR LAST 5 YEARS**

a. Function Code	b. Discipline	C. Number of Employees		a. Profile Code	b. Experience	c. Revenue Index Number (see below)
		(1) FIRM	(2) BRANCH			
2	Administrative	33	6	H11	Housing (Residential, Multi-Family, Apts, Condos)	8
6	Architect	2		H07	Highways, Streets, Airfield Paving, Parking Lots	7
8	AutoCAD	1		E09	Environmental Impact Studies, Assessments	7
	Construction Materials Manager	10	3	T02	Testing & Inspection Services	6
	Drillers	29	10	C10	Commercial Buildings (low rise), Shopping Centers	6
24	Environmental Scientist	19	4	W01	Warehouses & Depots	5
	Environmental Technician	2		S05	Soils & Geologic Studies, Foundations	4
	Field Technicians	94	17	H10	Hotels, Motels	4
30	Geologist	6	2	O01	Office Buildings, Industrial Parks	4
	Hydrogeologist			I01	Industrial Buildings, Manufacturing Plants	4
36	Industrial Hygiene			E02	Schools & Universities	4
	Lab Manager/Technician	14	4	A06	Airports, Terminals & Hangars, Freight Handling	4
	Professional Engineer	25	6	H09	Hospitals & Medical Facilities	4
48	Project Manager	59	25	P02	Petroleum and Fuel (Storage and Distribution)	3
	Soils Engineer			R04	Recreation Facilities (Parks, Marinas, etc.)	3
				D07	Dining Halls, Clubs, Restaurants	3
				E12	Environmental Remediation	3
				S13	Storm Water Handling & Facilities	3
				H06	Highrise, Air-Rights-Type Buildings	3
				W03	Water Supply, Treatment and Distribution	3
TOTAL		294	77			

 11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS
 (Insert revenue index number shown at right)

a. Federal Work	3
b. Non-Federal Work	9
c. Total Work	9

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

- | | |
|---|---|
| 1. Less than \$100,000 | 6. \$2 million to less than \$5 million |
| 2. \$100,000 to less than \$250,000 | 7. \$5 million to less than \$10 million |
| 3. \$250,000 to less than \$500,000 | 8. \$10 million to less than \$25 million |
| 4. \$500,000 to less than \$1 million | 9. \$25 million to less than \$50 million |
| 5. \$1 million to less than \$2 million | 10. \$50 million or greater |

12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE 	b. DATE September 6, 2024
---	------------------------------

 c. NAME AND TITLE
 Joey Broussard, PE – Subsidiary Regional Vice President

APPENDIX A

Forms, Licenses, Certifications



State of Florida

Woman Business Certification

Meskel & Associates Engineering, PLLC

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

05/04/2023 to 05/04/2025



J. Todd Inman

Florida Department of Management Services



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



FBPE
FLORIDA BOARD OF
PROFESSIONAL ENGINEERS

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

LANDING, DAVID REED

3072 GOLDEN POND BLVD
ORANGE PARK FL 32073

LICENSE NUMBER: PE80483

EXPIRATION DATE: FEBRUARY 28, 2025

Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

WIMPEE, CURTIS MARCEL

11410 WILDECROFT TERRACE
JACKSONVILLE FL 32223

LICENSE NUMBER: PE79764

EXPIRATION DATE: FEBRUARY 28, 2025

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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



FBPE
FLORIDA BOARD OF
PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

SCHOFIELD, JOSEPH RYAN

10475 FORTUNE PKWY.
SUITE 101
JACKSONVILLE FL 32256

LICENSE NUMBER: PE69219

EXPIRATION DATE: FEBRUARY 28, 2025

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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



FBPE
FLORIDA BOARD OF
PROFESSIONAL ENGINEERS

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

OESTMAN, ADAM VIKTOR

12844 BEAUBIEN RD
JACKSONVILLE FL 32258

LICENSE NUMBER: PE98440

EXPIRATION DATE: FEBRUARY 28, 2025

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**TROUT CREEK
COMMUNITY DEVELOPMENT DISTRICT
ST. JOHNS COUNTY, FL**

***REQUEST FOR QUALIFICATION
FOR
ENGINEERING SERVICES***



Submitted By:



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

September 6, 2024

Rizzetta & Company, Inc.
2806 North Fifth Street
Suite 403
St. Augustine, FL 32084

Re: Response to RFQ for the Trout Creek CDD.

Dear Rizzetta & Company, Inc.:

Yuro & Associates is excited for this opportunity to submit this request for qualifications to the Trout Creek Community Development District and become the District Engineer servicing this community. Yuro & Associates is an FDOT Certified Small Business with a tremendous amount of experience working with dozens of CDDs in a variety of roles.

The CDD Engineer designated for this project, Michael J. Yuro, a registered P.E., has over 35 years of experience in the engineering and development industry. Mike is the president and founder of Yuro & Associates and **will personally be involved in all efforts associated with this contract**. Mike's experience as a CDD engineer also includes Turnbull Creek CDD, St. Johns Forest CDD, Heron Isle CDD, Sampson Creek CDD at St. Johns Golf and Country Club and the Amelia Concourse CDD. Mike previously served as Director of Development for both Saint John's Golf and Country Club as well as the RiverTown community, therefore he understands the many different elements of a neighborhood better than most. This combination of experience as both CDD Engineer and Developer allows Yuro & Associates to bring a set of skills and knowledge that other engineering firms simply cannot match!

As Director of Development, Mike was responsible for overseeing more than \$75 million worth of infrastructure improvements on behalf of three different CDDs over a 8-year period including the construction of dozens of storm water ponds, roadways, parks, utilities and permitting efforts. In addition, Mike has also served as both a developer appointed CDD Board member, as well as a resident elected member, so he understands the need to be efficient and economical with his time while still ensuring the community is receiving outstanding service. Our involvement on all sides of a CDD will allow us to bring immediate value to this assignment because we realize the needs of a CDD and how critical it is to be proactive and efficient with our time. We also are very familiar and comfortable interacting with residents, agencies, developers and Board members. We provide outstanding communication skills as well as a common-sense approach to engineering design, always keeping the CDD bottom line a priority. In addition to engineering, we are also licensed to provide Professional Land Surveying to our list of services we provide, which will complement our Engineering efforts tremendously.



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

Finally, our office is located 5 miles from the Trout Creek Community which will bring value to this contract as we will *efficiently* and *economically* address any challenges or issues that may arise. Our team has the experience, expertise and local knowledge to continue to bring value to your community. The fact that we are a small business also helps keep our overhead down which in turn results in lower hourly rates for our team than many of our peers.

Sincerely,

Michael J. Yuro, P.E.
President

TABLE OF CONTENTS

PROCUREMENT DIVISION

1 QUALIFICATIONS

- A: ABILITY AND ADEQUANCY OF PROFESSIONAL PERSONNEL
- B: CERTIFIED MINORITY BUSINESS ENTERPRISE
- C: WILLINGNESS TO MEET TIME AND BUDGET REQUIREMENTS
- D: PAST EXPERIENCE AND PERFORMANCE
- E: GEOGRAPHIC LOCATION OF OFFICE
- F: CURRENT AND PROJECTED WORKLOAD
- G: VOLUME OF WORK PREVIOUSLY AWARDED BY THE DISTRICT

2 KEY PERSONNEL

3 STANDARD FORM 330

4 CLIENT REFERENCES

5 INSURANCE

6 BUSINESS ETHICS





- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

SECTION 1

QUALIFICATIONS

Yuro & Associates was established in 2008 and since that time our client base has continued to grow. We are proud of the fact that over 80% of our business is from repeat customers. Our clients keep coming back because of the outstanding service we provide time and time again.



FLORIDA P.E. LICENSE #65247



FDOT PREQUALIFIED

- 3.1 Minor Highway Design.
- 1.1 Traffic Engineering Studies.
- 7.1 Signing, Pavement Marking, and Channelization.
- 10.1 Roadway Construction Engineering Inspection.



FDOT CERTIFIED SMALL BUSINESS



JEA QUALIFIED PROPOSERS LIST

- WE7 Water, Sewer and Reclaimed Water pressurized pipe >24"
- WE8 Sewage Lift Station.
- WE9 Gravity sewer Pipe >8".
- WE14 Environmental Resource Permitting, Stormwater Permitting, and Wildlife Management.



GSWCC EROSION CONTROL CERT DESIGN PROFESSIONAL



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

Yuro & Associates, LLC is highly qualified with relevant experience on assignments likely to be needed by the Trout Creek CDD. Our team has over 60 years of combined experience in areas such as Design, Permitting, Drainage Evaluations, ADA Evaluations, Landscape and Irrigation Improvements, Hardscaping and Recreation Improvements, Survey, Construction Management and General Engineering Consulting. We were recently awarded the Amelia Walk CDD, Durbin Crossing CDD and Southaven CDD. In addition, we are the current CDD Engineer for the Amelia Concourse and Heron Isles CDD, Turnbull Creek CDD at Murabella and St Johns Forest CDD. In addition, Yuro & Associates has also worked for over a dozen HOA's and CDD's in St John's County that include drainage evaluations, ADA consulting, preparation of engineering reports & design plans, construction supervision, evaluation of storm water facilities & roads (including erosion issues) and coordination with County and State agencies on behalf of these communities. We are also licensed to provide professional land surveying services which can be a great asset to the district.

These assignments, combined with our prior experience in the development industry make us the ideal candidate to become the Trout Creek CDD Engineer. We pride ourselves on providing outstanding service for all of our contracts, and the response we have received from residents and CDD Board members has been overwhelmingly positive.

A: Ability and Adequacy of Professional Personnel

The CDD engineer designated for this project, Michael J. Yuro, P.E., has over 35 years of experience in the engineering and development industry. Mike's experience includes five (5) years serving as the District Engineer for the Turnbull Creek CDD, as well as serving as the CDD Engineer for the St. Johns Forest CDD (13 years), Heron Isles CDD (4 years), Sampson Creek CDD at St. Johns Golf and Country Club and Amelia Concourse CDD (3 years). As mentioned above, Mike was recently awarded the Amelia Walk, Southaven CDD and Durbin Crossing CDD. Mike also served as Director of Development for both St. Johns Golf & Country Club as well as the RiverTown community, therefore he understands the many different elements of a neighborhood better than most. Mike will use his knowledge of neighborhood infrastructure, easements, plats, and the distinction between the responsibilities of the CDD, HOA and individual resident lots to ensure that the CDD is receiving the services that you need and not paying for the responsibilities of others. Additionally, Mike has been a CDD Board member himself, and as such he has a thorough understanding of the needs and challenges that a CDD Board consistently faces. Mike Yuro will be the designated CDD Engineer for this assignment and will personally attend meetings, handle all coordination and direct all efforts associated with this contract.

Our past CDD efforts include developing site design plans & permitting them through the appropriate County, coordinating with SJRWMD on a variety of issues on behalf of CDDs as well as managing millions of dollars' worth of construction contracts (and often times value engineering the original engineering design during construction to save money for the CDD!) Assisting Mike will be Isaac Dougherty, E.I. Isaac has been very involved in our current CDD contracts and will be a valuable asset to ensure the needs of the Trout Creek CDD are always met.



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

Additionally, Mike's experience includes not only design, but also construction of dozens of storm water ponds and miles of storm pipe and storm water infrastructure. We're very familiar with the common construction practices and understand neighborhood infrastructure better than most.

B: Certified Minority Business Enterprise

Yuro & Associates is not a Certified *Minority* Business Enterprise; however, more and more agencies are moving towards fulfilling goals of **Certified Small Businesses**. We are proud to inform you that **Yuro & Associates, LLC is a FDOT Certified Small Business**.

C: Willingness to Meet Time and Budget Requirements

We are committed to meeting all of your expectations, and as such, we will consistently strive to ***exceed*** your time and budget requirements. We have the experience and resources needed for this contract and we will commit whatever resources and time that is necessary to ensure that the needs of the Trout Creek CDD are met 100% of the time! Should the needs of the CDD be such that additional resources are required, we will adjust our staffing level as necessary and/or utilize specialized sub-contractors. We have built our reputation on delivering outstanding client service and look forward to having Trout Creek CDD on our list of satisfied clients!

D: Past Performance and Experience

Yuro & Associates, LLC is the current engineer for the Amelia Walk CDD, Southaven CDD, Durbin Crossing CDD, St. Johns Forest CDD, Heron Isles CDD, Turnbull Creek CDD and Amelia Concourse CDD. In addition, Yuro & Associates has served as the CDD Engineer and Operations Manager for Sampson Creek CDD at St. Johns Golf and Country Club and also provided on-call Engineering consulting services for numerous HOAs, including the Magnolia Point HOA, Marsh Landing HOA and Marsh Creek Country Club. Tasks completed for these communities include preparation of engineering reports & design plans, construction supervision, evaluation of stormwater facilities & roads and coordination with County and State agencies on behalf of the CDD. These assignments, combined with our prior experience in the Development industry, make us the ideal candidate for the Trout Creek CDD Engineering position. We pride ourselves on providing outstanding service for all of our contracts, and the response we have received from residents and CDD Board members has been overwhelmingly positive. In fact, the Vice Chairman of the Sampson Creek CDD had this to say:

"...Mike is an intelligent and motivated individual who has impeccable attention to detail...Mike has reviewed all current service contracts and identified ways to reduce costs and strengthen the districts confidence in those providers...I highly recommend Yuro & Associates".



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

In addition to serving as the CDD Engineer for the CDDs mentioned above, we have also had a tremendous amount of experience working with other community CDDs & HOAs including: Wingfield Glen HOA, Tysons Landing CDD, Brightwater HOA, Vallini @ Glenn Kernan, St. Johns Forest HOA, Rose Creek Condo Association, Fleming Island CDD, Heritage Landing CDD, Julington Creek CDD, Two Creeks CDD, Sweetwater CDD, Montecito CDD, Pineridge Plantation CDD, Atlantic West (development for Lennar), Bainbridge CDD, Glen St. Johns CDD, Westland Oaks Development (for REDUS), Highland Glen HOA, Timber Creek HOA, Mill Creek HOA, Sawgrass Country Club HOA, Baypointe Condo Association & Marsh Landing HOA. We consider consulting with community associations to be our specialty!

Yuro & Associates also has a continuing contract for Engineering services from St. Johns County.

E: Geographic Location of Office

Yuro & Associates is located off of Highway 1, just east of I-95 and a mile south of CR 210, **only 10 minutes** from the Trout Creek community. This close proximity will provide for outstanding response time and availability to react to the needs of the CDD and respond promptly to any issue.

F: Current and Projected Workload

All of the neighborhoods where we are the current CDD Engineer are completely built out with their infrastructure, so while we are bringing value to these communities, it is on an as-needed basis. As such, Yuro & Associates, LLC has more than enough resources available to meet the needs of this project assignment. We are a growing firm that has office space to accommodate any adjustments in staffing. We will continuously monitor the workload associated with this contract to ensure that the needs of the CDD Board are always being met in a very timely manner.

G: Volume of Work Previously Awarded by the District

While Yuro & Associates has never been awarded work by the Trout Creek CDD, we have done a number of projects in St Johns County that include drainage evaluation, road inspections, ADA Consulting and miscellaneous engineering services for South Haven CDD, Durbin Crossing CDD, St Johns Forest CDD, Turnbull Creek CDD, Sampson Creek CDD and St Johns Golf and County Club.



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



FBPE
FLORIDA BOARD OF
PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

YURO, MICHAEL J

1001 MEADOW VIEW LANE
ST. AUGUSTINE FL 32092

LICENSE NUMBER: PE65247

EXPIRATION DATE: FEBRUARY 28, 2025

Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

SECTION 2

KEY PERSONNEL



MICHAEL J YURO, P.E.

Over 35 years of professional experience related to infrastructure improvements and real estate development, from design & permitting engineering plans to land use entitlements and construction management. Applies broad experience to consistently bring value to projects. Proven success in transportation design; career has progressed to include site/ civil design, utility design & permitting, environmental permitting, project management, client management and construction management.

CONTACT

(904) 343-0929

Myuro@mjyuro.com

EDUCATION

B.S. Civil Engineering
Technology, Georgia
Southern University

B.S. Civil Engineering,
University of North
Florida

AREAS OF EXPERTISE

- Engineering Services
- Permitting
- Project Management
- Construction Management
- Erosion Control / SWPPP
- ADA Consulting
- Development Services
- Feasibility / Due Diligence
- Utility Design / Coordination

PROFESSIONAL REGISTRATION

- Professional Engineer: FL #65247, GA #26942, NJ #42888, PA #PE-050303 (inactive)
- FDEP- Qualified Stormwater Management Inspector: Inspector #19349
- GSWCC- Level II Certified Design Professional: Certification #61307

PROFESSIONAL QUALIFICATIONS

- FDOT Prequalified in groups 3.1, 6.1 & 7.1
- JEA Qualified Proposer List (QPL) WE 7, WE8, WE9, WE14, WE17
- PL Registered Supplier
- Dale Carnegie - Leadership Training for Managers (9 - week course)
- Seton Hall University - Management of Change Module (72 hours)
- FCCJ - Project Management: A Primer (8 hrs.)
- FDOT - Project Management Module 1-4
- FDOT - Contract Estimates System (CES)
- FDOT - Utility Accommodation Manual Training
- IMSA - Certified Work Zone Safety Specialist
- FDEP - Stormwater Erosion and Sedimentation Control Inspector Training
- NPDES Training Institute



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

Michael J. Yuro, P.E.
CAREER SUMMARY

Mike Yuro, the founder of Yuro & Associates, has over 30 years of professional experience related to infrastructure improvements and real estate development, from design & permitting engineering plans to land use entitlements and construction management. Mike has had proven success in transportation design, and his career has progressed to include site/civil design, utility design & permitting, environmental permitting, project management, client management and construction management. This broad experience has allowed him to consistently bring value as a CDD engineer for a variety of clients. Specific areas of expertise include:

- Engineering Services
- Construction Management
- Development Services
- Permitting
- Erosion Control /SWPPP
- Feasibility/ Due Diligence
- Land Surveying
- Value Engineering
- Utility Design/ Coordination

EDUCATION & LICENSURE

BSE- Civil Engineering Technology, Georgia Southern University- Statesboro, GA
BSE- Civil Engineering, University of North Florida – Jacksonville, FL
Professional Engineer: FLORIDA # 65247; GEORGIA # 26942; NEW JERSEY #42888

FDOT CERTIFIED SMALL BUSINESS

FDEP – QUALIFIED STORM WATER MANAGEMENT INSPECTOR: INSPECTOR No.19349

GSWCC – LEVEL II CERTIFIED DESIGN PROFESSIONAL: CERTIFICATION No. 61307

WORK EXPERIENCE

YURO & ASSOCIATES, LLC

2009–PRESENT

President

Engineering Design & Consulting – Serves as the CDD Engineer for the St. Johns Forest CDD, Heron Isles CDD and Amelia Concourse CDD. Served as the CDD Engineer for the Sampson Creek CDD from 2009 to 2016 and the Turnbull Creek CDD from 2015-2020. Serves as the on-call engineer for design & consulting issues for the Magnolia Point Golf & Country Club and has provided similar services for a number of other communities, HOAs & Condo Associations. Expertise includes infrastructure inspection, drainage evaluations, site design & general engineering consulting.

Development Services – Completed development related projects for clients such as Wells Fargo, Lennar Corp, Taylor Morrison and the Drapak Group. Projects have included due diligence reports, construction management, permit coordination as well as facilitating the release of construction bonds.



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

Utility Design & Permitting – Completed hundreds of projects for TECO Peoples Gas for the design, permitting & installation of approximately 50 miles of P.E. & Steel gas mains. Also designed the relocation of a 6” JEA water main as part of a FDOT 3R project in Jacksonville, FL.

Construction Management – Mike has utilized his experience as a design engineer as well as his years “in the field” as Director of Development to help ensure construction projects are completed in a quality manner. Construction projects that Mike has managed include roadway construction, utility installation, parking lot construction, commercial site development, construction of a go cart track, construction of 6 soccer fields as well as vertical construction of an amenity center.

THE ST. JOE COMPANY – JACKSONVILLE, FLORIDA

2005 – 2009

Director of Development

Directly responsible for all aspects of development in the North Florida Region from design & permitting through final construction. Managed the development of several communities, including St. Johns Golf & Country Club, which included 799 homesites, a golf course and clubhouse, amenity center, 4 lift stations and several miles of “offsite” roadway improvements for St. Johns County. Also managed the development of RiverTown, a 4,170 acre development in Northwest St. Johns County, Florida which includes 4,500 approved units, 500,000sf of commercial space, 3 school sites, a golf course, 7 neighborhood amenities and over 6 miles of off-site road construction.

- Managed over \$86M worth of construction contracts.
- Delivered over 400 completed lots in the first phase of construction.
- Coordinating with 5 different builders in a very tight “TND” neighborhood.
- Managed design, permitting & construction of more than 4 miles of main line “wet utilities” (water, FM, re-use).
- Coordination of dry utilities including power (FPL), gas (TECO), and communication (AT&T), including advanced relocation, as necessary.
- Coordinated design and construction of over 1-mile of overhead to underground conversion of power.
- Oversaw design & construction of 4 lift stations, including a “master triplex lift station” with 3-180hp pumps.
- Construction management of over 6 miles of 4-lane roadway improvements.
- Coordinated with FDOT on design of over 1-mile of State Road improvements including 2 roundabouts.
- Managed the construction of a 4 field baseball complex complete with stadium style seating & concession bldg.
- Value Engineered neighborhood & roadway design plans which resulted in over \$3M in savings.



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

TRANSYSTEMS CORPORATION – JACKSONVILLE, FLORIDA

2004 – 2005

Design Team Leader

Presided over the transportation operations in North Florida. Responsible for supervising and directing the civil design staff, project management, client management, marketing and strategic planning. Also served as Project Manager for municipal clients as well as land development clients. Utility design & coordination on the following:

- McDuff Avenue roadway & utility improvements in Jacksonville, FL
 - Very urban area requiring extensive utility coordination and advance relocation services.
- Crystal Springs Road improvements in Jacksonville, FL
- South Francis Road in St. Johns County, FL

EDWARDS AND KELCEY – JACKSONVILLE, FLORIDA

1994 – 2004

Vice President/Client Manager

Served as supervisor of several design teams in addition to assuming the duties of Vice President and Client Manager for several of the largest clients for the Jacksonville office. Responsibilities included establishing priorities for several design groups, procurement of work from numerous clients, project management and supervision.

- Provided design oversight and Value Engineering.
- Responsible for the design, production and ultimate client satisfaction of well over \$30M worth of infrastructure improvements.
- Responsibilities included Constructability reviews; QC review; utility design & relocation coordination, transportation design, commercial site development; and land development
- Utility design coordination and advanced relocation services for numerous projects, including:
 - SR 100 4-lane improvements in Bunnell, FL
 - Lenox Avenue 3-lane improvements in Jacksonville, FL



ISAAC DOUGHERTY E.I.

Civil Engineer

EXPERIENCE

Total- 3 years

With current firm- 2 years

EDUCATION

B.A. Science -
Engineering,
University of North
Florida

Skills:

- Civil Site Plan
- Utility Coordination
- Stormwater Mngt

RELEVANT PROJECTS

LIGHTHOUSE DRIVE- ST. AUGUSTINE- 2022

- Forcemain Design- project to install forcemain to switch from septic to city sewer. Design included 470' of forcemain

TIMUQUANA COUNTRY CLUB-PRACTICE FACILITY (present)

- Head of project

TECO PEOPLES GAS (2021-present)

- Right-Of-Way Utility Planning

ST JOHNS GOLF & COUNTRY CLUB (2022-present)

- Site Improvements- Project involving grading plans, storm water management, sidewalk facilities, new sanitary sewer and water service extension.

GARDEN WOODS GAS MAIN REPLACEMENT

- Gas Main improvements over 22,000 LF
- Permitting

TURNBULL CREEK CDD (2021 -present)

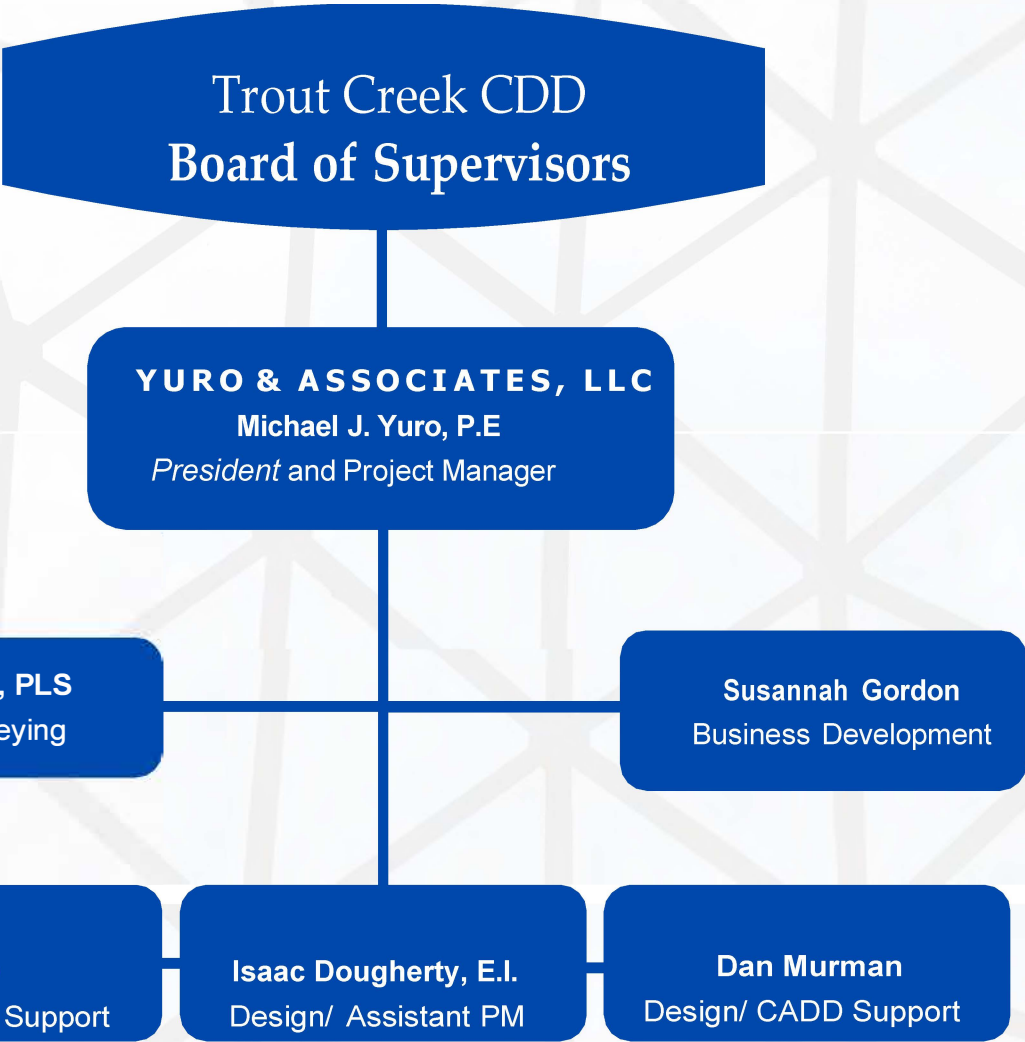
- Stormwater Inspections
- Pavement Evaluation
- Pond Bank Inspections

STAFFING AND ORGANIZATION

ENGINEERING SERVICES



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting





Section 3

Standard Form 330



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting



ARCHITECT - ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION (City and State)

Trout Creek CDD

2. PUBLIC NOTICE DATE

3. SOLICITATION OR PROJECT NUMBER

RFQ for Engineering Services

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

Michael J. Yuro, P.E. , President

5. NAME OF FIRM

Yuro & Associates, LLC

6. TELEPHONE NUMBER

(904) 342-5199

7. FAX NUMBER

8. E-MAIL ADDRESS

myuro@mjyuro.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	J-V PARTNER	SUBCON-TRACTOR				
a.	<input checked="" type="checkbox"/>			Yuro & Associates, LLC	145 Hilden Road Unit 108 Ponte Vedra, FL 32081	Engineering Services
			<input type="checkbox"/> CHECK IF BRANCH OFFICE			
c.			<input type="checkbox"/>			
d.			<input type="checkbox"/> CHECK IF BRANCH OFFICE			
e.			<input type="checkbox"/> CHECK IF BRANCH OFFICE			
f.			<input type="checkbox"/> CHECK IF BRANCH OFFICE			

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

(Attached)

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Michael J. Yuro, P.E.	13. ROLE IN THIS CONTRACT District Engineer	14. YEARS EXPERIENCE	
		a. TOTAL 30	b. WITH CURRENT FIRM 18

15 FIRM NAME AND LOCATION (*City and State*)
Yuro & Associates, LLC Ponte Vedra, FL 32081

16. EDUCATION (<i>DEGREE AND SPECIALIZATION</i>) Georgia Southern University - Bachelor of Science, Civil Engineering Technology (1991) University of North Florida - Bachelor of Science, Civil Engineering (2006)	17. CURRENT PROFESSIONAL REGISTRATION (<i>STATE AND DISCIPLINE</i>) Florida - P.E. #65247 Georgia - P.E. #026942 New Jersey - P.E. #42888 Pennsylvania - P.E. #050302 (<i>inactive</i>)
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18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, Etc.*)
FDEP - Qualified Stormwater Management Inspector (Inspector #19349)
GSWCC Certified Inspector

19. RELEVANT PROJECTS

a.	(1) TITLE AND LOCATION (<i>City and State</i>) CDD Engineer - Turnbull Creek St. Johns County, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2015-current	CONSTRUCTION (<i>If applicable</i>)
	(3) BRIEF DESCRIPTION (<i>Brief scope, size, cost, etc.</i>) AND SPECIFIC ROLE Currently the CDD Engineer with a contract for continuing engineering services that may be necessary for the community. Typical assignments include preparing engineering reports, design plans, specifications for roadway and landscape improvements, as well as park and other recreation improvements.	<input checked="" type="checkbox"/> Check if project performed with current firm	
b.	(1) TITLE AND LOCATION (<i>City and State</i>) CDD Engineer - Sampson Creek CDD St. Johns County, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES 2010-2016	CONSTRUCTION (<i>If applicable</i>)
	(3) BRIEF DESCRIPTION (<i>Brief scope, size, cost, etc.</i>) AND SPECIFIC ROLE CDD Engineer with a contract for continuing engineering services that may be necessary for the community. Typical assignments include preparing engineering reports, design plans, specifications for roadway and landscape improvements, as well as park and other recreation improvements.	<input checked="" type="checkbox"/> Check if project performed with current firm	
c.	(1) TITLE AND LOCATION (<i>City and State</i>) CDD Engineer - St. Johns Forest CDD St. Johns County, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES current	CONSTRUCTION (<i>If applicable</i>)
	(3) BRIEF DESCRIPTION (<i>Brief scope, size, cost, etc.</i>) AND SPECIFIC ROLE Currently the CDD Engineer with a contract for continuing engineering services that may be necessary for the community. Typical assignments include preparing engineering reports, design plans, specifications for roadway and landscape improvements, as well as park and other recreation improvements.	<input checked="" type="checkbox"/> Check if project performed with current firm	
d.	(1) TITLE AND LOCATION (<i>City and State</i>) Amelia Concourse CDD Nassau County, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES current	CONSTRUCTION (<i>If applicable</i>)
	(3) BRIEF DESCRIPTION (<i>Brief scope, size, cost, etc.</i>) AND SPECIFIC ROLE Currently the CDD Engineer with a contract for continuing engineering services that may be necessary for the community. Typical assignments include preparing engineering reports, design plans, specifications for roadway and landscape improvements, as well as park and other recreation improvements.	<input checked="" type="checkbox"/> Check if project performed with current firm	
e.	(1) TITLE AND LOCATION (<i>City and State</i>) Heron Isles CDD Yulee, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES current	CONSTRUCTION (<i>If applicable</i>)
	(3) BRIEF DESCRIPTION (<i>Brief scope, size, cost, etc.</i>) AND SPECIFIC ROLE Currently the CDD Engineer with a contract for continuing engineering services that may be necessary for the community. Typical assignments include preparing engineering reports, design plans, specifications for roadway and landscape improvements, as well as park and other recreation improvements.	<input type="checkbox"/> 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 Susannah Gordon	13. ROLE IN THIS CONTRACT Business Development Manager	14. YEARS EXPERIENCE	
		a. TOTAL 2	B. WITH CURRENT FIRM 2

15. FIRM NAME AND LOCATION *(City and State)*
Yuro & Associates, LLC Ponte Vedra, FL 32081

16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i> Colorado State University	17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i>
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18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, Etc.)*

19. RELEVANT PROJECTS

a.	(1) TITLE AND LOCATION <i>(City and State)</i> Amelia Councourse CDD Nassau County, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES Current	CONSTRUCTION <i>(If applicable)</i>
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Provide support for contract maintenance and project research, as necessary	<input checked="" type="checkbox"/>	Check if project performed with current firm
b.	(1) TITLE AND LOCATION <i>(City and State)</i> St. Johns Forest CDD St. Johns County, FL	(2) YEAR COMPLETED	
		Current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Provide support for contract maintenance and project research, as necessary	<input checked="" type="checkbox"/>	Check if project performed with current firm
c.	(1) TITLE AND LOCATION <i>(City and State)</i> Teco Peoples Gas Throughout FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES current	CONSTRUCTION <i>(If applicable)</i>
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Provide support for contract maintenance and project research, as necessary	<input checked="" type="checkbox"/>	Check if project performed with current firm
d.	(1) TITLE AND LOCATION <i>(City and State)</i> Heron Isles Yulee, FL	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES current	CONSTRUCTION <i>(If applicable)</i>
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE Provide support for contract maintenance and project research, as necessary	<input checked="" type="checkbox"/>	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 Dan Murman	13. ROLE IN THIS CONTRACT Design / CADD Operator	14. YEARS EXPERIENCE	
		a. TOTAL 4	B. WITH CURRENT FIRM 4

15 FIRM NAME AND LOCATION *(City and State)*

Yuro & Associates, LLC Ponte Vedra, FL 32081

16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i> University of South Florida - Bachelor of Science in Electrical Engineering (1993)	17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i>
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18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, Etc.)*

19. RELEVANT PROJECTS

	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a.	Turnbull Creek CDD St. Johns County, FL	2018-2020	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE CADD Design as needed	<input checked="" type="checkbox"/>	Check if project performed with current firm
b.	St. Johns Forest CDD St. Johns County, FL	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE CADD Design as needed	<input checked="" type="checkbox"/>	Check if project performed with current firm
c.	Amelia Concourse CDD Nassau County, FL	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE CADD Design as needed	<input checked="" type="checkbox"/>	Check if project performed with current firm
d.	TECO Peoples Gas Throughout FL	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE CADD Design as needed	<input checked="" type="checkbox"/>	Check if project performed with current firm
e.	Heron Isles CDD Yulee, FL	Present	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/>	Check if project performed with current firm

CADD Design as needed

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME Isaac Dougherty, E.I.	13. ROLE IN THIS CONTRACT Design / CADD Operator	14. YEARS EXPERIENCE	
		a. TOTAL 2	B. WITH CURRENT FIRM 2

15 FIRM NAME AND LOCATION *(City and State)*

Yuro & Associates, LLC Ponte Vedra, FL 32081

16. EDUCATION *(DEGREE AND SPECIALIZATION)*

UNF

17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*

18. OTHER PROFESSIONAL QULAIIFICATIONS *(Publications, Organizations, Training, Awards, Etc.)*

19. RELEVANT PROJECTS

	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a.	Amelia Concourse CDD Nassau County, FL	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/> Check if project performed with current firm	
	Stormwater Inspections and As-Built Certification		
b.	St. Johns Forest CDD St. Johns County, FL	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/> Check if project performed with current firm	
	Drainage Evaluations, Stormwater Inspections and Roadway Evaluations		
c.	Timuquana Practice Facility	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/> Check if project performed with current firm	
	Project Management, Permit Coordination and Design		
d.	St. Johns Golf & Country Club St. Johns County, FL	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/> Check if project performed with current firm	
	Water and Sewer Desing and Site Grading for Driving Range Improvements		

	(1) TITLE AND LOCATION (<i>City and State</i>)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (<i>If applicable</i>)
e.	Heron Isles CDD Yulee, FL	current	
	Infrastructure Inspections (Sidewalk, Curb, Roads)	<input checked="" type="checkbox"/>	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 Yi Dao	13. ROLE IN THIS CONTRACT Design / CADD Operator	14. YEARS EXPERIENCE	
		a. TOTAL 1	B. WITH CURRENT FIRM 1

15 FIRM NAME AND LOCATION *(City and State)*
Yuro & Associates, LLC Ponte Vedra, FL 32081

16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i> Student at UNF	17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i>
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18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, Etc.)*

19. RELEVANT PROJECTS

	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a.	Amelia Walk CDD Nassau County, FL	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/> Check if project performed with current firm	
	CADD Design as needed		
b.	South Haven CDD St. Johns County, FL	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/> Check if project performed with current firm	
	CADD Design as needed		
c.	TECO Peoples Gas	current	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/> Check if project performed with current firm	
	CADD Design as needed		
d.	Durbin Crossing CDD Yulee, FL	Present	
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input checked="" type="checkbox"/> Check if project performed with current firm	
	CADD Design as needed		

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 1
--	--

21. TITLE AND LOCATION (<i>City and State</i>) CDD Engineer Yulee, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES current	CONSTRUCTION (if applicable)

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Heron Isles CDD	b. POINT OF CONTACT NAME Daniel Laughlin	c. POINT OF CONTACT TELEPHONE NUMBER 904-940-5850

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

Current CDD Engineer for the Heron Isles CDD providing continuing engineering services for a variety of work authorizations, including preparing engineering studies and reports, facility inspections, drainage evaluation, traffic evaluation and civil engineering designs.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT		
a. (1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION (<i>City and State</i>) Ponte Vedra, FL	(3) ROLE CDD 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. 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 2
--	--

21. TITLE AND LOCATION <i>(City and State)</i> CDD Engineer St. Johns County, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2022-current	CONSTRUCTION (If applicable)

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Turnbull Creek CDD	b. POINT OF CONTACT NAME Carol Brown	c. POINT OF CONTACT TELEPHONE NUMBER (904) 436-6270

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

Previous CDD Engineer for the Turnbull Creek CDD @ Murabella providing continuing engineering services for a variety of work authorizations, including preparing engineering studies and reports, facility inspections, drainage evaluation, traffic evaluation and civil engineering designs. Our major design task to Dave has been the inspector, evaluation and preparing design plans for the phase 2 pond bank reconstruction project. This effort is necessary due to failing pond banks throughout the community. Previously, Yuro & Associates completed the 1-year warranty inspection for the phase 1 pond bank repair effort.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT		
a. (1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION <i>(City and State)</i> Ponte Vedra, FL	(3) ROLE CDD 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. 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 3
--	--

21. TITLE AND LOCATION (<i>City and State</i>) CDD Engineer St Johns, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES current	CONSTRUCTION (If applicable)

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Durbin Crossing CDD	b. POINT OF CONTACT NAME Daniel Laughlin	c. POINT OF CONTACT TELEPHONE NUMBER 904-940-5850

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

Current CDD Engineer for the Durbin Crossing CDD providing continuing engineering services for a variety of work authorizations, including preparing engineering studies and reports, facility inspections, drainage evaluation, traffic evaluation and civil engineering designs.



C INVOLVED WITH THIS PROJECT	25. FIRMS FROM SECTION
-------------------------------------	-------------------------------

a.	(1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION (<i>City and State</i>) Ponte Vedra, FL	(3) ROLE CDD 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. 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 4
--	--

21. TITLE AND LOCATION (<i>City and State</i>) CDD Engineer St. Johns County, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2010 - Present	CONSTRUCTION (if applicable)

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER St. Johns Forest CDD	b. POINT OF CONTACT NAME Ms. Janice Davis (CDD Manager)	c. POINT OF CONTACT TELEPHONE NUMBER (904) 940-6400
---	---	---

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

Current CDD Engineer for the St. Johns Forest CDD, providing continuing engineering services for a variety of work authorizations, including preparing engineering studies and reports, facility inspections, drainage evaluation, traffic evaluation and civil engineering designs. In addition, we have coordinated with St. Johns County on behalf of the development to evaluate and consolidate all outstanding bonds, an effort that resulted in over \$250k in savings. Also coordinated with St. Johns County on behalf of the CDD for improvements to CR 210 which included widening the existing 4-lane road to 6-lanes in front of this community. We also reviewed design plans and the proposed R/W acquisition agreement from the County to ensure the St. Johns Forest CDD is not harmed by the improvements.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION (<i>Cityand State</i>) Ponte Vedra, FL	(3) ROLE CDD Engineer
b.	(1) FIRM NAME	(2) FIRM LOCATION (<i>Cityand State</i>)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (<i>Cityand State</i>)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (<i>Cityand State</i>)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (<i>Cityand 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 5
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21. TITLE AND LOCATION (<i>City and State</i>) CDD Engineer St Johns, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES current	CONSTRUCTION (if applicable)

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Southaven CDD	b. POINT OF CONTACT NAME Daniel Laughlin	c. POINT OF CONTACT TELEPHONE NUMBER 904-940-5850

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

Current CDD Engineer for the Southaven CDD providing continuing engineering services for a variety of work authorizations, including preparing engineering studies and reports, facility inspections, drainage evaluation, traffic evaluation and civil engineering designs.



C INVOLVED WITH THIS PROJECT 25. FIRMS FROM SECTION

a.	(1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION (<i>City and State</i>) Ponte Vedra, FL	(3) ROLE CDD 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. 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 6
21. TITLE AND LOCATION (<i>City and State</i>) CDD Engineer Nassau, FL		22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (if applicable) current
23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Amelia Concourse CDD	b. POINT OF CONTACT NAME Daniel Laughlin	c. POINT OF CONTACT TELEPHONE NUMBER 904-940-5850
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (<i>Include scope, size, and cost</i>)		

Current CDD Engineer for the Amelia Concourse CDD providing continuing engineering services for a variety of work authorizations, including preparing engineering studies and reports, facility inspections, drainage evaluation, traffic evaluation and civil engineering designs.



C INVOLVED WITH THIS PROJECT		25. FIRMS FROM SECTION
a. (1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION (<i>City and State</i>) Ponte Vedra, FL	(3) ROLE CDD 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. 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 (<i>City and State</i>) CDD Engineer Nassau, FL	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES current	CONSTRUCTION (if applicable)

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER Amelia Walk CDD	b. POINT OF CONTACT NAME Daniel Laughlin	c. POINT OF CONTACT TELEPHONE NUMBER 904-940-5850

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

Current CDD Engineer for the Amelia Walk CDD providing continuing engineering services for a variety of work authorizations, including preparing engineering studies and reports, facility inspections, drainage evaluation, traffic evaluation and civil engineering designs.



C INVOLVED WITH THIS PROJECT 25. FIRMS FROM SECTION

a.	(1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION (<i>City and State</i>) Ponte Vedra, FL	(3) ROLE CDD 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. 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 9
--	--

21. TITLE AND LOCATION (<i>City and State</i>)		22. YEAR COMPLETED	
St Johns County- Parks & Recreation	St Augustine, FL	PROFESSIONAL SERVICES current	CONSTRUCTION (if applicable)

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Mill Creek Park	b. POINT OF CONTACT NAME Douglas Tarbox	c. POINT OF CONTACT TELEPHONE NUMBER (904) 209-0124

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

18 acre County recreation park that includes 4 ball fields, 1 multi-use field, parking, stormwater & Utility design. We provided multiple conceptual designs, final design & permitting, coordinating with multiple consultants & post design services during construction.



C INVOLVED WITH THIS PROJECT		25. FIRMS FROM SECTION
a.	(1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION (<i>City and State</i>) Ponte Vedra, FL
b.	(1) FIRM NAME	(2) FIRM LOCATION (<i>City and State</i>)
c.	(1) FIRM NAME	(2) FIRM LOCATION (<i>City and State</i>)
d.	(1) FIRM NAME	(2) FIRM LOCATION (<i>City and State</i>)
e.	(1) FIRM NAME	(2) FIRM LOCATION (<i>City and State</i>)

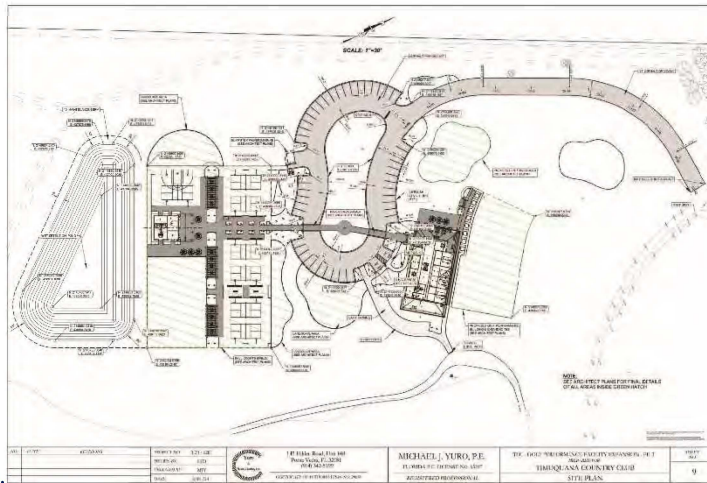
F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)	20. EXAMPLE PROJECT KEY NUMBER 10
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21. TITLE AND LOCATION (<i>City and State</i>) Timuquana Country Club-Practice Facility St Augustine, FL	22. YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (if applicable) current
---	---

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER Timuquana Practice Facility	b. POINT OF CONTACT NAME Greg Sheara	c. POINT OF CONTACT TELEPHONE NUMBER gsheara@timuquana.net

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

6.5 acre expansion of the TCC practice facility to include a new performance building, expanded practice tee, new putting green, 6 pickle ball courts, pickleball pavilion, new parking, stormwater pond, water & sewer design and permitting with SJRWMD, COJ, FDEP & JEA. Effort included coordination with multiple consultants, conceptual design, final design & permitting & bidding



coordination.

C INVOLVED WITH THIS PROJECT			25. FIRMS FROM SECTION
a.	(1) FIRM NAME Yuro & Associates, LLC	(2) FIRM LOCATION (<i>City and State</i>) Ponte Vedra, FL	(3) ROLE CDD 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

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	
Michael J. Yuro, P.E.	District Engineer	X	X	X	X	X	X	X	X	X	X	X
Dan Murman	CADD Designer	X	X	X				X	X			X
Susannah Gordon	Business Development Manager	X	X	X				X	X			
Yi Dao	CADD Designer			X				X				
Isaac Dougherty, E.I.	CADD Designer		X	X	X			X				X
Gary P. Yuro	Professional Surveyor	X	X						X			X

29. EXAMPLE PROJECTS KEY

NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)	NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)
1	Heron Isles CDD	6	CDD Engineer- Amelia Concourse
2	CDD Engineer - Turnbull Creek	7	CDD Engineer- Amelia Walk CDD
3	CDD Engineer – Durbin Crossing CDD	8	Tormenta Stadium
4	CDD Engineer - St. Johns Forest CDD	9	Mill Creek Park
5	Southaven CDD	10	Timuquana Practice Facility

H. ADDITIONAL INFORMATION

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

The skill set and experiences outlined in this proposal demonstrate that we are a perfect fit for the responsibilities listed in your RFP. We are the current Engineer for the Durbin Crossing CDD, Amelia Walk CDD, South Haven CDD, St. Johns Forest CDD, Heron Isles CDD, Turnbull Creek CDD and Amelia Concourse CDD. Not only have we provided valuable services for these Districts, we have also received overwhelming support and positive feedback from both the residents and CDD Board. A brief listing of the benefits that we bring to this project includes:

- Licensed Professional Engineer with over 35 years of experience.
- CDD Engineer for the Turnbull Creek CDD (at Murabella), the St. Johns Forest CDD, Heron Isles CDD, Amelia Concourse CDD, Amellia Walk CDD, Southaven CDD, Durbin Crossing CDD and the Sampson Creek CDD (at SJGCC)
- Engineering Services for the Magnolia Point HOA, Marsh Creek Country Club, Marsh Landing HOA and many others.
- Served as Operations Manager for the Sampson Creek CDD at SJGCC; responsibilities include overseeing vendor contracts & maintenance of all District infrastructure, as well as advising and working with the CDD Board as necessary
- Experience as Director of Development for RiverTown, a 4,170 acre DRI in northwest St. Johns County; responsible for over \$75 million worth of infrastructure improvements in past 4 years
- Experience as Director of Development for St. Johns Golf & Country Club, a 799 unit development in northwest St. Johns County.
- Assisted in formation of 2 CDDs for RiverTown (Main Street & Rivers Edge)
- Assisted with turn-over of CDD from developer to resident controlled board (@ SJGCC)
- Served on CDD as developer appointed representative
- Served as Chairman of CDD as resident elected Board member

In summary, Mike Yuro and staff has spent the last 22 years working for and with CDDs in northeast Florida in just about every capacity imaginable, from design engineer, to developer, to Board member to management consultant. This experience makes Yuro & Associates the perfect choice to handle the responsibilities associated with this contract as we are confident that we will bring immediate value to the Durbin Crossing Community Development District.

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE



32. DATE

September 7, 2023

33. NAME AND TITLE

Michael J. Yuro, P.E., **President**

SECTION 4

CLIENT

REFERENCES



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

In addition to the letter of references included in this section, we welcome the committee to contact any of the references listed here. They will be able to provide testimony to the high quality of worked provided by Yuro & Associates.

Amelia Concourse & Heron Isles CDDs

Daniel Laughlin
CDD Manager
(904) 940-5850 ext. 401

Sampson Creek CDD

Mr. Steve Sharpe
Former CDD Board Member
(904) 887-4839

St. Johns Forest CDD

Ms. Janice Davis
CDD Manager
(904) 940-6400

BVT Enterprises, Inc.

Mr. Darin Van Tassell
President
(912) 687-2526

Turnbull Creek CDD

Ms. Carol Brown
CDD Manager
(904) 436-6270 ext. 4631



- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

SECTION 5

INSURANCE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/05/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Norman Insurance Advisors, LLC 798 North Ponce de Leon Blvd. St. Augustine FL 32084	CONTACT NAME: Andrew M Norman PHONE (A/C, No, Ext): (904) 819-5949 E-MAIL ADDRESS: admin@normaninsuranceadvisors.com	FAX (A/C, No): (904) 819-5951	
	INSURER(S) AFFORDING COVERAGE		
INSURED Yuro and Associates LLC 145 Hilden Road, Suite 108 Ponte Vedra FL 32081 (904) 343-0929	INSURER A: Main Street America Protection		NAIC # 13026
	INSURER B: Lloyds		
	INSURER C: Associated Industries Insuranc		23140
	INSURER D:		
	INSURER E:		
INSURER F:			

COVERAGESPR **CERTIFICATE NUMBER:** Cert ID 22669 (11)**REVISION NUMBER:**


THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			BPG2739G	08/29/2023	08/29/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			BPG2739G	08/29/2023	08/29/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED RETENTION \$						<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE EACH OCCURRENCE \$ AGGREGATE \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	AWC1194953	05/14/2023	05/14/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	E&O - Architects & Eng			ANE110411823	09/03/2023	09/03/2024	Each Claim \$ 1,000,000 Aggregate Limit \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Certificate holder has been added as additional insured with respect to the General Liability policy only.

CERTIFICATE HOLDER**CANCELLATION**

TECO, Peoples Gas System Materials Management, Plaza 7 P O Box 2562 Tampa FL 33601	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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ACORD 25 (2016/03)

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- Civil Engineering
- Land Surveying & Mapping
- Permitting
- ADA Consulting

SECTION 6

BUSINESS ETHICS

Yuro & Associates has never been investigated and our ethical conduct has never been questioned for as long as the company has been in existence. We hold ethical business practices in the highest regard.

Tab 9

Café Report

Based on resident and board feedback, here is the management staff's list of benefits and challenges for contracting the café out to a third-party vendor. All listed below may vary based on third-party proposal.

General Benefits

- Expanded Menu
- Extended hours for café
 - o Resident demand for food peaks in the evenings during weekdays
- Additional source of income
 - o Asking a percentage from the café for using District space
- Independently ran
 - o No longer requiring staff to manage
- Possible go-to caterer for events
- Adds greater sense of community

General Challenges

- Café hours exceeding staff hours
 - o Lack of supervision
- Health department/licensing questions
 - o i.e. mandated bathroom accessibility?
 - o Licensing Requirements or Changes if menu extended to offer beer or other license specific items
- Ventilation concerns (if ovens are installed; construction concerns...see "Current Questions")
- Limited indoor seating in HUB (office)
 - o Kayak club primarily used for seating currently
 - o Limited Capacity when backdoor leading to Club Room ends up locked
 - o Possible overcrowded office while conducting daily duties with staff
- Greater need of communication for storage space and cleaning responsibilities
 - o Limited storage; shared with Shearwater staff (pantry, cabinets, minifridge)
- Higher security concerns if café register holds cash

Current Questions and Considerations

- Will the district percentage remain 10%? If not, what percentage?
- Will district allow vendor to sell beer and wine?
- Installation of sliding concessions window
 - o Could offer food services without leaving office open after staff hours
- Time-span of build out dependent on final agreement
 - o Unsightly construction; sounds of construction during pool/office hours
 - o Unusable space?
- Install awning for outside line if sliding window is installed

- How long would third party contract be for?
 - o Consequences of breach of contract
 - o See "Alternative Proposal"

Benefits and Challenges with Specific Proposals

(*Note: these are listed in accordance with first draft of initial proposals; subject to change)

Frankie's Franks – Selling hot dogs/sausages and expanding into ice cream, pretzels, coffee and the like

Benefits

- Clear and simple menu options
 - o Snack and refreshments oriented
- Relatively quick food service and quick and easy to serve/eat
- Simple appliance additions
 - o tabletop steamers and hot plates as opposed to ovens or stovetop installations, ice cream machine, ice cream blender, refrigerator and freezer
- Serving window as preferred method of service
 - o No additional cafe occupation in the HUB or Kayak Club
- Hours will match up with office hours
 - o Additional supervision not needed

Challenges

- Needs to discuss storage and cleaning responsibilities
- Hours will match up with office hours
 - o High evening demand not met

Little Pizza Truck – bringing a wider variety of items (sandwiches, pizza, apps, baked goods, wine/beer, smoothies, breakfast items, etc.)

Benefits

- Fresh-made and quality food options
 - o Appealing to poolside demand
- Already accounting for window installation in budget
- Applying for 2COP beer and wine license and will hold “all liability insurance” needed
- Longer hours
 - o 8am-8pm; greater demand for food in the evening

Challenges

- Too wide of a menu selection?
 - o Will profits justify cost of inventory?
 - o Overwhelming for possible customers?
- Lots of installation necessary (per first proposal)
 - o Pizza oven (ventilation), ice cream machine, and 3 compartment sinks
 - o Negotiation of renovations required
- The goal of making our café a “true hub” to sit is great...but there is limited seating
 - o Planning to direct seating to the kayak club? If so, how does that effect facility reservations?
- Hours of operation is outside of staff/office hours (lack of supervision)
- Need to discuss storage and cleaning responsibilities

Alternative proposal: Rotating Occupancy

Joe Gerena, one of our lifestyle directors, pitched the idea for a rotating third-party occupancy. The general idea is to have a different party run the café each day/week/month (i.e. Franks on Mondays, coffee shop on Tuesdays, etc.)

Benefits

- Gives variety; flexible menu
- Takes care of storage issue;
 - o The third party would bring their own supplies
- Shearwater has more autonomy over what is served
- Can highlight small businesses

Challenges

- Inconsistency may be confusing to residents
- Quality may vary
- Price fluctuations
- Requires much more coordination with multiple vendors

Considerations

- Would the change of vendors be a daily, weekly, or monthly rotation?
- How consistent would the vendor options be?
 - o Same vendors in rotation or varying vendors?
- How do menu/price fluctuations effect revenue?

Summary

Little Pizza Truck aims for a “resort style poolside café,” while Frankie’s Franks seems to aim for a quality concession window. One’s vision aims for a café experience of ideal quality, but one not simply or easily attainable. The other offers a more realistic use of the café, but likely without the ‘resort quality.’

The next steps for the café are dependent on the board’s overall vision for what the café should be: a resort style poolside service that will take time and effort to implement or a more down-to-earth concessions window that is easier to implement. Besides these two official proposals, other vendors have expressed interest in using the café space (coffee vendors, food vendors, café/breakfast vendors, etc.). Depending on the vision for the café space, one of these vendors can be the perfect means to bring the café to its full potential.

Tab 10



September 5, 2024

Trout Creek CDD
c/o Rizzetta and Company
2806 North Fifth Street
St. Augustine, FL 32084

RE: Full Service Reserve Study with Site Inspection
Trout Creek CDD
260 Shearwater Parkway
St. Augustine, FL 32092

Dear Board of Supervisors:

We are very appreciative for the opportunity to perform a full reserve study with site inspection and recommendations for Trout Creek CDD. We are a team of knowledgeable reserve analysts with extensive experience and take pride in performing reserve studies. The reserve study will project costs and funding for a 30 year time frame for all common areas and improvements.

Trout Creek CDD commenced operations in 2014. The community started home construction soon after and construction has been gradual since inception. The community is comprised of single family homes and townhomes. There will be 2,782 owners at build-out. The community has an amenity campus with a pool area, waterslide, clubhouse and tennis courts that are the main amenities. The CDD consists of 997.90 acres and is located in St. Augustine, St. Johns County, Florida. After a review of plats, aerials, and county records, we recommend the following reserve items be included in the report:

- **Tennis Courts (4)**
- **Clubhouse**
- **Fitness Center**
- **Pool Area and Equipment**
- **Waterslide**
- **Playground**
- **Sidewalks/Trails**
- **Entry Monuments/Features**
- **Stormwater Drainage**
- **Ponds**
- **Dog Park**
- **Garden Center**
- **Boardwalks**
- **Fountains**
- **Streets and Parking Areas**
- **Golf Pathways**
- **Landscaping and Irrigation**
- **Any Other Items Specified by You**

The physical analysis portion of the reserve study will include a reserve item component list, remaining life, useful life, current cost, future cost of all reserve items as well as any site recommendations. The financial analysis portion of the study will include allowances for your interest income, taxes and projected changes in building costs. The pooled method and component method (if applicable) will be used and presented to derive the funding schedules.



Scope of Service

Our scope of service for a full service reserve study with site inspection that includes all expenses consists of:

- Site inspection of common areas and improvements with both a Certified General Contractor and a CAI-designated Reserve Specialist (Both are degreed engineers).
- Our user-friendly reserve study report that includes narrative, photographs, pooled method cash flow plan, component method plan (if applicable), reserve item component cost, remaining life, and useful life inventory. The report projects costs and funding for 30 years using localized costs.
- Percent Funded Analysis. This compares what you have in reserve funds to what the ideal amount should be, something many reserve studies do not include.
- One site meeting with management or the board on the day of inspection, if requested.
- Electronic copies of the report. Electronic copies can also be requested any time in the future by email. A hard copy is available free of charge upon request.
- Revisions or amendments of reports for up to 90 days from the first submission of the report. We welcome all feedback. (It is not uncommon for there to be one or two refinements of the report to meet your specific requirements).
- Accessibility. Call, write, or email us any time and you will receive prompt follow-up. We aim to exceed expectations and consider customer service our top priority.
- 30 year cash flow plan in the report.
- Review of plats, drawings, and site aerials.



Qualifications

Paul Gallizzi and Steven Swartz are professionals in the business of preparing reserve studies and insurance appraisals for community associations. We both inspect all properties and have provided detailed analysis of over 300,000 single family, apartment, villa, townhome, and condominium units. Our high repeat customer rate indicates high customer satisfaction. We have prepared reserve studies and insurance appraisals for all types of community associations including high rise condominiums, mid-rise condominiums, garden-style condominiums, office condominiums, medical condominiums, townhouse developments, single family residential homeowners associations, community development districts, and special use facilities.

We both hold engineering degrees from fully accredited universities. Paul is a State Certified General Real Estate Appraiser License Number RZ 110 and a State Certified General Contractor License Number CGC 019465 with over 30 years of experience in each. Steven is one of approximately only 200 people nationwide that have earned the designation of Reserve Specialist (RS) from the Community Associations Institute and is a State Certified General Real Estate Appraiser License Number RZ 3479. He has also been a speaker at CAI functions discussing reserves and budgeting. To learn more, please visit us on the web at www.reservestudyfl.com and visit our articles section for more than 50 articles about reserves, funding, and budgeting.

A partial list of our clients include:

- Greenacre Properties
- Standard Pacific Homes
- Leland Management
- M/I Homes
- Associa Gulf Coast
- Sentry Management
- Starwood Land Ventures
- Management & Associates
- Resource Property Management
- Condominium Associates
- Insurance Office of America
- Argus Property Management
- Creative Management
- Many Other Individually Managed Associations
- The Mahaffey Apartment Company
- Rizzetta & Company
- First Service Residential
- Brown & Brown Insurance
- Taylor Morrison Homes
- Vanguard Management Group
- Lennar Homes
- McNeil Management Services
- Development Planning and Financing Group
- Qualified Property Management
- Avid Property Management
- Southshore Property Management
- Terra Management Services



Experience

Here is a short list of communities we have conducted reserve studies for, showing experience with various construction types, building systems, and community amenities:

Fishhawk CDD I, CDD II, CDD III, & CDD IV, Lithia, Florida

Fishhawk Ranch is a large planned community consisting of approximately 3000 acres in Lithia, Florida. It is comprised of numerous single family home subdivisions as well as a few townhome subdivisions. There are many community amenities including swimming pools, clubhouses, tennis courts, playgrounds, fitness centers, a banquet center, running trails, parks, and various others. The District also maintains the ponds, stormwater drainage, and the entry areas. There are a total of 6,286 members.

Heritage Harbour South CDD, Bradenton, Florida

Heritage Harbour South CDD is comprised of single family residential and multifamily residences. The community started construction in 2002 and construction finished in 2006. Overall, there are 1,523 units. The CDD maintains the baseball field and recreation area. The District also maintains the streets, ponds, stormwater drainage, and the entry areas. The CDD encompasses a total site size of 980.79 acres in Bradenton, Florida.

Venetian CDD, Venice, FL

Venetian CDD commenced operations in September 2002. The Venetian Golf and River Club has 1,377 lots planned primarily for single family residential development as well as a small amount of multi-family development. The River Club recreation area was built in 2004 and includes a clubhouse, kitchen and banquet facilities, fitness center, pool area, tennis courts, as well as other amenities. The District also maintains the streets, ponds, stormwater drainage, and the entry areas. The CDD encompasses a total site size of 964 acres.

Riverwood CDD, Port Charlotte, FL

Riverwood CDD started development in the mid 1990s and most of the construction was complete over the next decade. The District maintains an amenity campus with a clubhouse/athletic center, pool area, tennis, and shuffleboard courts. The district also owns an off-site Beach Club on Manasota Key in Englewood. The Beach Club was built in 2003 and acquired in 2014. Additionally, the District also maintains the streets, potable water system, re-claimed water system, sewer system (and plant), and stormwater drainage.

Two Creeks CDD, Middleburg, FL

Two Creeks has 624 platted lots planned for single family residential development and encompasses 625 acres. The community was platted in June 2007. Within the district, there is a recreation comprised of a clubhouse, pool area, 2 tennis courts, a basketball court, playgrounds, and a volleyball court. The community also maintains the ponds, stormwater drainage, and the entry areas.



Services


The fee schedule for the current assignment is as follows, please sign below to confirm your acceptance:


Full Service Reserve Study with Site Inspection (Level-1) \$6,600

We will provide you with electronic copies of the report of your choice. Payment will be due at the first submission of the report. The report will be completed within ten weeks of our firm receiving this engagement letter signed and faxed or emailed to our office.

Thank you again for the opportunity to present our proposal to you.

Sincerely,


Paul Gallizzi
Florida General Contractor #CGC-019465
State-Certified General Appraiser RZ110


Steven Swartz, RS
Reserve Specialist Designation No. 214
State-Certified General Appraiser RZ3479

Accepted by Signature: _____

Date _____

Accepted by Printed Name: _____



Property Wellness Reserve Study Program Proposal Level I Reserve Study

Reserve Advisors, LLC
201 E. Kennedy Boulevard, Suite 1150
Tampa, FL 33602
(800) 980-9881
reserveadvisors.com

Shearwater Community Development District
St. Augustine, FL



Reserve Advisors

Your Property Wellness Consultants



Our Property Wellness Reserve Study Program

Your home is the most expensive personal property you will ever own. The responsibility for preserving its value reaches beyond your home to include the spaces you share with your neighbors. Structures, systems, streets and amenities must be maintained to protect the value of your investment. But the required responsibility often stretches beyond individual knowledge and expertise. That's why associations turn to Reserve Advisors. As your property wellness consultants, our reserve study helps associations understand their assets, expected lifespans, and both the budgets and maintenance needed to keep them in great working order.



A Proactive Property Wellness Program

Our engineers provide a thorough evaluation of your property and shared assets, and create a strong, informed plan to maximize your community's physical and financial wellness for the long haul. Because proactive care ensures that your shared property is cared for the way you would care for your home. We have been helping communities thrive for over 30 years. But the job we are obsessed with is making sure you and your neighbors have what you need to protect your property today, and prevent costly and avoidable repairs tomorrow. It is the best way to care for the place that makes you feel welcome, safe, secure and proud.



Threshold Funding Strategy

The most stable and equitable approach to funding reserves, this strategy aggregates all future expenditures and calculates annual reserve contributions such that the reserve balance never falls below a minimum threshold.

Helping Communities Thrive for Over 30 Years

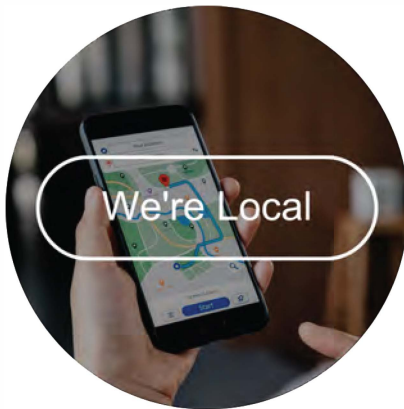
Reserve Advisors has prepared over 29,000 reserve studies for common interest realty associations nationwide. Our service area is one of the largest in the industry.

Through the leadership of our founders, John Poehlmann and Theodore Salgado, we helped pioneer the standards that all reserve study providers are measured by today. This success comes from our independence, extensive knowledge and experience. We pride ourselves on delivering unbiased recommendations that give community associations the plans they need to ensure the future well-being of their property.

60+
ENGINEERS

29,000
RESERVE STUDIES CONDUCTED

300+
YEARS OF RESERVE STUDY EXPERIENCE



Local Conditions

Drawing upon our broad national experience, we recognize the profound impact local conditions have on the wear and tear of common property and subsequent replacement needs.

Local Costs

Our exclusive database of client project costs grants you real-time access to localized pricing, ensuring that your reserve study projections are not reliant on standardized costs.

Level I Full Reserve Study



	LEVEL I	LEVEL II	LEVEL III
	FULL RESERVE STUDY	RESERVE STUDY UPDATE WITH SITE-VISIT	RESERVE STUDY WITHOUT SITE-VISIT
		RESERVE STUDY PROCESS	
ONSITE VISUAL INSPECTION	✓	✓	
PRE-INSPECTION MEETING	✓	✓	
COMPONENT INVENTORY PLUS COMPONENT QUANTITIES & MEASUREMENTS	Established	Re-Assessed / Evaluated	Reflects prior study
CONDITION ASSESSMENTS	Based on visual observation	Based on visual observation	As reported by association
USEFUL LIFE ESTIMATES	Based on engineer's condition assessment	Based on engineer's condition assessment	Based on client's reported condition
VALUATION/COST ESTIMATES VIA PROPRIETARY BID DATABASE	Established for each reserve component	Re-evaluated for each reserve component	Re-evaluated for each reserve component
		KEY DELIVERABLES	
MEETS AND EXCEEDS CAI'S NATIONAL RESERVE STUDY STANDARDS	✓	✓	✓
PRIORITIZED LIST OF CAPITAL EXPENDITURES	✓	✓	✓
CUSTOMIZED RECOMMENDED FUNDING PLAN(S)	✓	✓	✓
RECOMMENDED PREVENTATIVE MAINTENANCE ACTIVITIES	✓	✓	
INCLUSION OF LONG-LIVED ASSETS	✓	✓	✓
ELECTRONIC REPORT	Comprehensive report with component detail	Comprehensive report with component detail	Executive summary overview
EXCEL SPREADSHEETS	✓	✓	✓
SUPPORT WITH IMPLEMENTATION OF REPORT	✓	✓	✓
COMPLIMENTARY REPORT REVISION	✓	✓	
UNCONDITIONAL POST-STUDY SUPPORT AT NO ADDITIONAL COST INCLUDING REPORT PRESENTATION	✓	✓	✓
	RECOMMENDED SERVICE LEVEL		

We are proposing a Level I Full Reserve Study. This service involves developing a component list and quantification of each item - a crucial aspect often overlooked by unqualified providers. This service is suitable for communities that have never undergone a reserve study, as well as those contemplating a change in reserve study providers. Conducting a Level I Reserve Study allows us to not only verify the accuracy of the component inventory and related quantities/measurements with certainty - the foundation of any reserve study - but to also present capital planning recommendations with unwavering confidence.

Property Wellness Reserve Study Program - Level I

Reserve Advisors will perform a Level I Reserve Study in accordance with Community Associations Institute (CAI) National Reserve Study Standards. Your reserve study is comprised of the following:

Physical Analysis: The reserve study consultant will develop a detailed list of reserve components, also known as a component inventory, and related quantities for each. We will complete a condition assessment or physical evaluation for each reserve component and the current condition of each will be documented with photographs. Life and cost estimates will be performed to determine estimated useful lives, remaining useful lives and current cost of repair or replacement.

Financial Analysis: The reserve study consultant will identify the current reserve fund status in terms of cash value and prepare a customized funding plan. The funding plan outlines recommended annual reserve contributions to offset the future cost of capital projects over the next 30 years.

Property Description

We've identified and will include the following reserve components:

Fitness Room(s), Party Room(s), Meeting Room(s), Clubhouse(s), Sport Court(s), Pond(s), Playground(s), Pool(s), Pool House(s), and other property specifically identified that you'd like us to include.

Scope of work includes all property owned-in-common as defined in your association's declaration and other property specifically identified that you'd like us to include.

Key Elements of Your Level I Property Wellness Reserve Study Program

Reserve Advisors' Exclusive Tools

Reserve Advisors' exclusive tools allow you to make informed decisions to maintain your association's long-term physical and financial health.



Reserve Expenditures

View your community's entire schedule of prioritized expenditures for the next 30-years on one easy-to read spreadsheet.

[View Example](#)



Funding Plan

Establishes the most stable and equitable recommended annual reserve contributions necessary to meet your future project needs.

[View Example](#)



Reserve Funding Graph

Highlights your community's current financial health and provides visibility to your projected cash flow over the next 30 years.

[View Example](#)



Component Specific Details

Including photographic documentation of conditions, project specific best practices outlining the scope of future projects, and preventative maintenance activities to maximize component useful lives.

[View Example](#)



Excel Spreadsheets

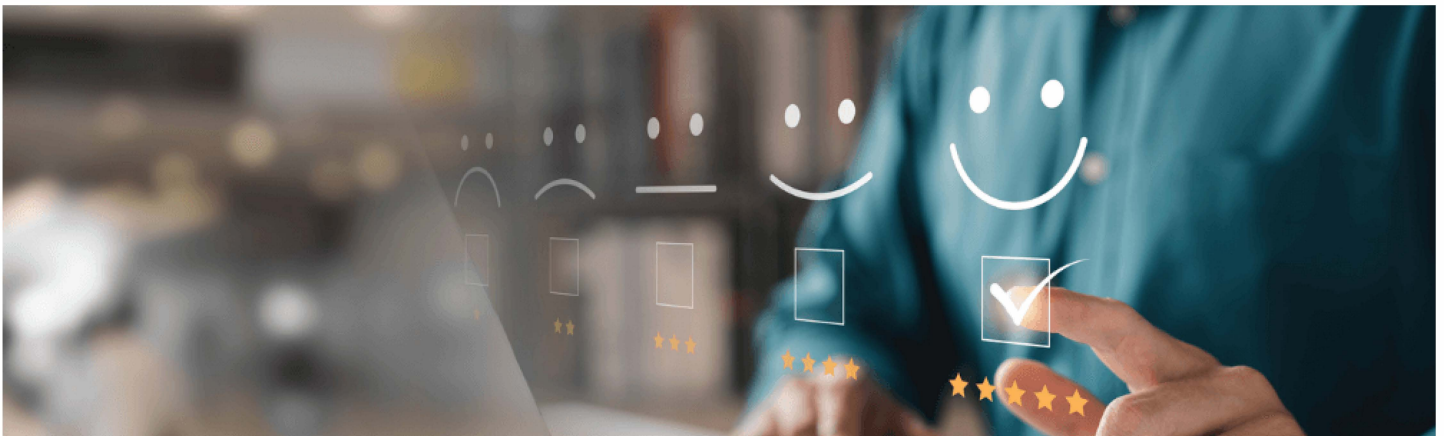
Empowering you to make more informed decisions by adjusting project schedules, future costs, and annual contributions in real time.

For Confidence in All Decisions

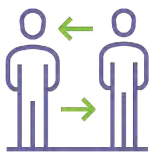


Personalized Experience Guarantee

As your trusted advisor, we are committed to providing clarity on the true cost of property ownership through a comprehensive reserve study solution and unmatched advisory services. If the experience we provide fails to live up to your expectations, contact us at any time for a refund.



Your property is your biggest investment. Here's why our solution is the best for your community:



Full Engagement

It's our job to understand your specific concerns and to discuss your priorities in order to ensure your reserve study experience exceeds expectations.



Detailed Understanding

We will do whatever it takes to ensure you have complete confidence in interpreting and putting into practice our findings and recommendations.



Ongoing Support

Unlike other firms, we provide current and future boards with additional insight, availability to answer questions and guidance well beyond report delivery.

The Time to Protect Your Property's Long-Term Health is Now

This proposal, dated 09 / 03 / 2024, for a **Level I Property Wellness Reserve Study**, is valid for 90 days.

To Start Your Property Wellness Level I Reserve Study Program Today:

1. Select the service options below to confirm scope of engagement

Service	Price
<p>Reserve Study (Level I)</p> <p>This service includes a pre-project meeting to discuss your unique needs and priorities with our engineer. You'll receive: 1) a PDF report with 30-year expenditure and funding plan tables, 2) Excel spreadsheet with formulas, and 3) Complimentary support with implementation of your study and ongoing guidance.</p>	<p>\$8,300.00</p>
<p>Total \$8,300.00</p>	

2. E-sign below

Signature:

Title:

Name:

Date:

For: Shearwater Community Development
District

Ref: 243400

3. Pay \$4,150.00

Retainer via mail or ACH

Mailing Address

Reserve Advisors, LLC
PO Box 88955
Milwaukee, WI 53288-8926

ACH

Send Remittances to 'accounting@reserveadvisors.com' at time of payment

Checking Account Number: 151391168

Routing Number: 075905787

Financial Institution: First Business Bank

17335 Golf Parkway, Suite 150 | Brookfield, WI 53045

You will receive your electronic report approximately four (4) weeks after our inspection, based on timely receipt of all necessary information from you. Authorization to inspection time varies depending on demand for our services. This proposal, dated 09 / 03 / 2024, is valid for 90 days, and may be executed and delivered by facsimile, portable document format (.pdf) or other electronic signature pages, and in any number of counterparts, which taken together shall be deemed one and the same instrument. One complimentary hard copy report is available upon request.

Professional Service Conditions

Our Services - Reserve Advisors (“RA” or “us” or “we”) performs its services as an independent contractor in accordance with our professional practice standards and its compensation is not contingent upon our conclusions. The purpose of our reserve study is to provide a budget planning tool that identifies the current status of the reserve fund, and an opinion recommending an annual funding plan, to create reserves for anticipated future replacement expenditures of the subject property. The purpose of our energy benchmarking services is to track, collect and summarize the subject property’s energy consumption over time for your use in comparison with other buildings of similar size and establishing a performance baseline for your planning of long-term energy efficiency goals.

Our inspection and analysis of the subject property is limited to visual observations, is noninvasive and is not meant to nor does it include investigation into statutory, regulatory or code compliance. RA inspects sloped roofs from the ground and inspects flat roofs where safe access (stairs or ladder permanently attached to the structure) is available. Our energy benchmarking services with respect to the subject property is limited to collecting energy and utility data and summarizing such data in the form of an Energy Star Portfolio Manager Report or any other similar report, and hereby expressly excludes any recommendations with respect to the results of such energy benchmarking services or the accuracy of the energy information obtained from utility companies and other third-party sources with respect to the subject property. The reserve report and any energy benchmarking report (i.e., any Energy Star Portfolio Manager Report) (including any subsequent revisions thereto pursuant to the terms hereof, collectively, the “Report”) are based upon a “snapshot in time” at the moment of inspection. RA may note visible physical defects in the Report. The inspection is made by employees generally familiar with real estate and building construction. Except to the extent readily apparent to RA, RA cannot and shall not opine on the structural integrity of or other physical defects in the property under any circumstances. Without limitation to the foregoing, RA cannot and shall not opine on, nor is RA responsible for, the property’s conformity to specific governmental code requirements for fire, building, earthquake, occupancy or otherwise.

RA is not responsible for conditions that have changed between the time of inspection and the issuance of the Report. RA does not provide invasive testing on any mechanical systems that provide energy to the property, nor can RA opine on any system components that are not easily accessible during the inspection. RA does not investigate, nor assume any responsibility for any existence or impact of any hazardous materials, such as asbestos, urea-formaldehyde foam insulation, other chemicals, toxic wastes, environmental mold or other potentially hazardous materials or structural defects that are latent or hidden defects which may or may not be present on or within the property. RA does not make any soil analysis or geological study as part of its services, nor does RA investigate vapor, water, oil, gas, coal, or other subsurface mineral and use rights or such hidden conditions, and RA assumes no responsibility for any such conditions. The Report contains opinions of estimated replacement costs or deferred maintenance expenses and remaining useful lives, which are neither a guarantee of the actual costs or expenses of replacement or deferred maintenance nor a guarantee of remaining useful lives of any property element.

RA assumes, without independent verification, the accuracy of all data provided to it. Except to the extent resulting from RA’s willful misconduct in connection with the performance of its obligations under this agreement, you agree to indemnify, defend, and hold RA and its affiliates, officers, managers, employees, agents, successors and assigns (each, an “RA Party”) harmless from and against (and promptly reimburse each RA Party for) any and all losses, claims, actions, demands, judgments, orders, damages, expenses or liabilities, including, without limitation, reasonable attorneys’ fees, asserted against or to which any RA Party may become subject in connection with this engagement, including, without limitation, as a result of any false, misleading or incomplete information which RA relied upon that was supplied by you or others under your direction, or which may result from any improper use or reliance on the Report by you or third parties under your control or direction or to whom you provided the Report. NOTWITHSTANDING ANY OTHER PROVISION HEREIN TO THE CONTRARY, THE AGGREGATE LIABILITY (IF ANY) OF RA WITH RESPECT TO THIS AGREEMENT AND RA’S OBLIGATIONS HEREUNDER IS LIMITED TO THE AMOUNT OF THE FEES ACTUALLY RECEIVED BY RA FROM YOU FOR THE SERVICES AND REPORT PERFORMED BY RA UNDER THIS AGREEMENT, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY OR OTHERWISE. YOUR REMEDIES SET FORTH HEREIN ARE EXCLUSIVE AND ARE YOUR SOLE REMEDIES FOR ANY FAILURE OF RA TO COMPLY WITH ITS OBLIGATIONS HEREUNDER OR OTHERWISE. RA SHALL NOT BE LIABLE FOR ANY SPECIAL, INDIRECT, INCIDENTAL, CONSEQUENTIAL, PUNITIVE OR EXEMPLARY DAMAGES OF ANY KIND, INCLUDING, BUT NOT LIMITED TO, ANY LOST PROFITS AND LOST SAVINGS, LOSS OF USE OR INTERRUPTION OF BUSINESS, HOWEVER CAUSED, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), BREACH OF WARRANTY, STRICT LIABILITY OR OTHERWISE, EVEN IF RA HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT WILL RA BE LIABLE FOR THE COST OF PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES. RA DISCLAIMS ALL REPRESENTATIONS AND WARRANTIES WHATSOEVER, EXPRESS OR IMPLIED OR OF ANY NATURE, WITH REGARD TO THE SERVICES AND THE REPORT, INCLUDING, WITHOUT LIMITATION, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

Professional Service Conditions - Continued

Report - RA will complete the services in accordance with the Proposal. The Report represents a valid opinion of RA's findings and recommendations with respect to the reserve study and is deemed complete. RA will consider any additional information made available to RA within 6 months of issuing the Report and issue a revised Report based on such additional information if a timely request for a revised Report is made by you. RA retains the right to withhold a revised Report if payment for services was not tendered in a timely manner. All information received by RA and all files, work papers or documents developed by RA during the course of the engagement shall remain the property of RA and may be used for whatever purpose it sees fit. RA reserves the right to, and you acknowledge and agree that RA may, use any data provided by you in connection with the services, or gathered as a result of providing such services, including in connection with creating and issuing any Report, in a de-identified and aggregated form for RA's business purposes.

Your Obligations - You agree to provide us access to the subject property for an on-site visual inspection. You agree to provide RA all available, historical and budgetary information, the governing documents, and other information that we request and deem necessary to complete the Report. Additionally, you agree to provide historical replacement schedules, utility bills and historical energy usage files that RA requests and deems necessary to complete the energy benchmarking services, and you agree to provide any utility release(s) reasonably requested by RA permitting RA to obtain any such data and/or information from any utility representative or other third party. You agree to pay actual attorneys' fees and any other costs incurred to collect on any unpaid balance for RA's services.

Use of Our Report - Use of the Report is limited to only the purpose stated herein. You acknowledge that RA is the exclusive owner of all intellectual property rights in and relating to the Report. You hereby acknowledge that any use or reliance by you on the Report for any unauthorized purpose is at your own risk and that you will be liable for the consequences of any unauthorized use or distribution of the Report. Use or possession of the Report by any unauthorized third party is prohibited. The Report in whole or in part is not and cannot be used as a design specification for design engineering purposes or as an appraisal. You may show the Report in its entirety to the following third parties: members of your organization (including your directors, officers, tenants and prospective purchasers), your accountants, attorneys, financial institutions and property managers who need to review the information contained herein, and any other third party who has a right to inspect the Report under applicable law including, but not limited, to any government entity or agency, or any utility companies. Without the written consent of RA, you shall not disclose the Report to any other third party. By engaging our services, you agree that the Report contains intellectual property developed (and owned solely) by RA and agree that you will not reproduce or distribute the Report to any party that conducts reserve studies or energy benchmarking services without the written consent of RA.

RA will include (and you hereby agree that RA may include) your name in our client lists. RA reserves the right to use (and you hereby agree that RA may use) property information to obtain estimates of replacement costs, useful life of property elements or otherwise as RA, in its sole discretion, deems appropriate.

Payment Terms, Due Dates and Interest Charges - If reserve study and energy benchmarking services are performed by RA, then the retainer payment is due upon execution of this agreement and prior to the inspection by RA, and any balance is due net 30 days from the Report shipment date. If only energy benchmarking services are performed by RA, then the retainer payment is due upon execution of this agreement and any balance is due net 30 days from the Report shipment date. In any case, any balance remaining 30 days after delivery of the Report shall accrue an interest charge of 1.5% per month. Unless this agreement is earlier terminated by RA in the event you breach or otherwise fail to comply with your obligations under this agreement, RA's obligations under this agreement shall commence on the date you execute and deliver this agreement and terminate on the date that is 6 months from the date of delivery of the Report by RA. Notwithstanding anything herein to the contrary, each provision that by its context and nature should survive the expiration or early termination of this agreement shall so survive, including, without limitation, any provisions with respect to payment, intellectual property rights, limitations of liability and governing law.

Miscellaneous – Neither party shall be liable for any failures or delays in performance due to fire, flood, strike or other labor difficulty, act of God, act of any governmental authority, riot, embargo, fuel or energy shortage, pandemic, wrecks or delays in transportation, or due to any other cause beyond such party's reasonable control; provided, however, that you shall not be relieved from your obligations to make any payment(s) to RA as and when due hereunder. In the event of a delay in performance due to any such cause, the time for completion or date of delivery will be extended by a period of time reasonably necessary to overcome the effect of such delay. You may not assign or otherwise transfer this agreement, in whole or in part, without the prior written consent of RA. RA may freely assign or otherwise transfer this agreement, in whole or in part, without your prior consent. This agreement shall be governed by the laws of the State of Wisconsin without regard to any principles of conflicts of law that would apply the laws of another jurisdiction. Any dispute with respect to this agreement shall be exclusively venued in Milwaukee County Circuit Court or in the United States District Court for the Eastern District of Wisconsin. Each party hereto agrees and hereby waives the right to a trial by jury in any action, proceeding or claim

brought by or on behalf of the parties hereto with respect to any matter related to this agreement. We reserve the right to limit or decline refunds in our sole discretion. Refunds vary based on the applicable facts and circumstances.

Your property's future starts with
A Reserve Study Today.

We prepare conservative reserve studies so you can make informed decisions on setting aside the financial resources to maintain your property the way you want over time.

Traditional Reserve Study Proposal
Trout Creek Community Development District
August 13, 2024

Proposal Number: 24.08.13.401

20+	2,360	\$1,048,220,881
Years Combined Experience	Components Evaluated	Funding Guidance Provided

Thank You.



THANK YOU FOR YOUR TRUST

August 13, 2024

Trout Creek Community Development District
C/O Jessica, Knutelsky
Assistant General Manager
100 Kayak Way
St. August, FL 32092

Dear Ms. Knutelsky:

We are pleased to submit this reserve study proposal for Trout Creek Community Development District (the "Association") to you.

Our mission is to provide you with a conservative reserve study, giving you the best opportunity to set aside the financial resources needed to maintain your property's appearance and value over time.

We want you to feel comfortable and confident in the quality of our work. That is why we show you our sample report before you even consider doing business with us. We recommend that you review this because we prefer to lose your business than provide you with services that do not meet your objectives.

We always ask for more time than we think we need in our proposals because we prefer that you be pleasantly surprised when we deliver early rather than being disappointed if we were to be late.

Sound fair and reasonable?

Sincerely,



Glenn M. Tyndall, Jr., CPA, PRA, CEO and Founder



EXECUTIVE SUMMARY

Introduction

A reserve study is a capital budgeting tool that is designed to establish a funding plan to offset the deterioration of a property that happens over time.

Objective

Our mission is to prepare conservative reserve studies so you can make informed decisions on setting aside the financial resources to maintain your property the way you want over time.

Methodology

A reserve study may include:

- An onsite visit with a non-invasive, visual inspection only.
- Representative sampling of components to take their counts and measurements.
- A photographic inventory of components.
- A financial analysis that includes a funding plan.

A reserve study does not include:

- A guarantee that no special assessments will be required in the future.
- Invasive, destructive testing, or forensic testing.
- Design, build, engineering, architectural, or appraisal services.
- Recommendations on repairs to be done or 3rd party contractors to be used.

Findings

Our findings will be presented in a reserve study report, and we try to be conservative in our estimates. We will provide a sample report for the services requested before you even consider doing business with us. We prefer to lose your business rather than to profit from delivering to you a service that you do not need or that you will not be 100% satisfied with. **That's why we strongly recommend reviewing this sample report to ensure our report will meet your needs and objectives before you engage us for services.**

Recommendations

We will give you our opinion on funding, although our opinion is one of many. Therefore, when possible, we will incorporate the changes requested by you as management or the Board as it's your study and you should have the peace of mind to know that we will incorporate your goals into the study when possible.

Fee For Service

See the end of this proposal for our fees for services.

When Needed.





RESERVE STUDY INSTITUTE, LLC

EXECUTIVE AND SENIOR PROFESSIONALS



GLENN M. TYNDALL JR., CPA
Founder & CEO



MICHAEL H. RUSS JR.
Senior Reserve Study Analyst

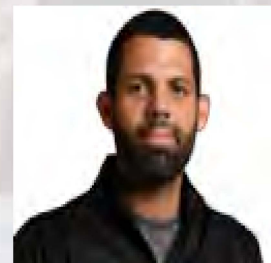
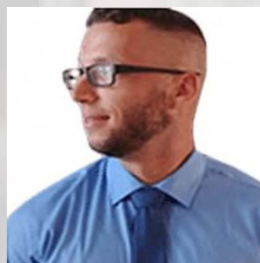
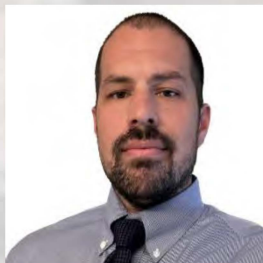
Founder: Glenn Tyndall, Jr., CPA
B.B.A, University of North Florida

Bio: Mr. Tyndall founded Reserve Study Institute after working in public accounting for more than 15 years, which included over a decade as the principal of a CPA firm in which he provided clients with audit, tax, and consulting services. He has worked with community associations, non-profits, labor unions, trade associations, property and casualty insurers, real estate companies, and high-net-worth individuals.

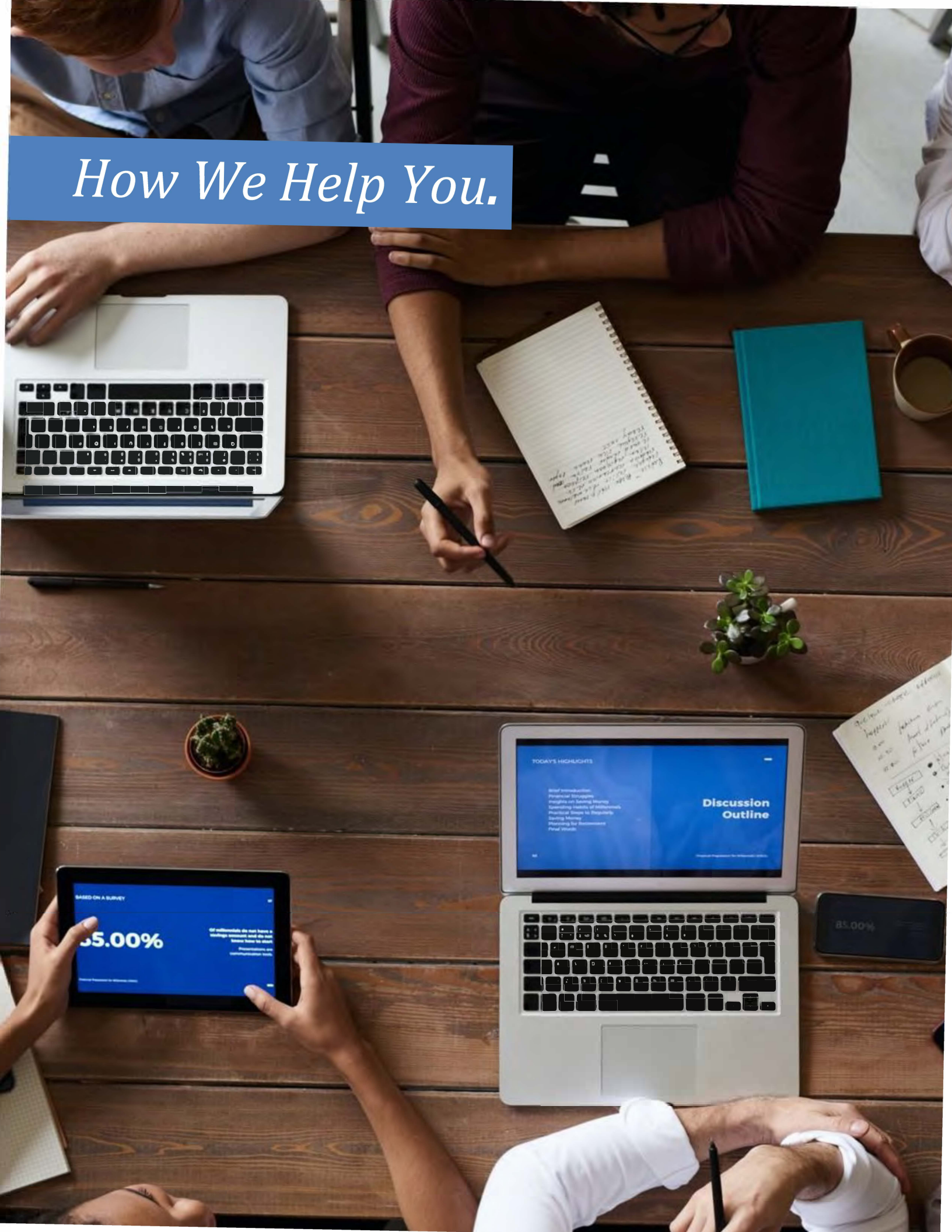
Senior: Michael H. Russ, Jr.
Economics, Florida State College

Bio: Mr. Russ began consulting with Reserve Study Institute, LLC after experience in construction and the financial services industry. Mr. Russ established the residential construction firm, Florida Construction Industries, Inc. Mr. Russ has also worked as a financial advisor at National Financial Services Group, a leading global financial services firm, in which he conducted financial and investment analyses and prepared and reviewed complex financial models for corporate and high net worth clients.

Analysts: T. Christopher Tyndall, Reserve Study Analyst, Manager
Daniel Coons, Reserve Study Analyst
Mike Gamez, Reserve Study Analyst
Angel Gamez, Reserve Study Analyst
Michael Kubler, Reserve Study Analyst



How We Help You.



BASED ON A SURVEY

85.00%

85% of millennials do not have a mortgage and do not have time to invest in real estate.

Real estate is a long-term investment.

TODAY'S HIGHLIGHTS

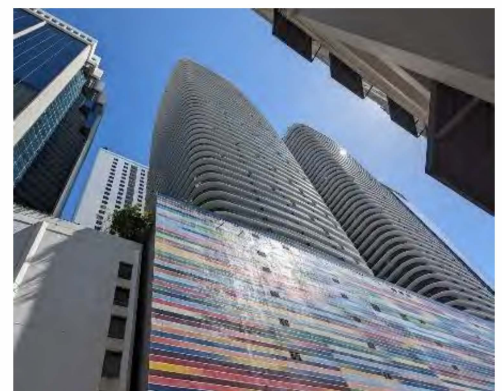
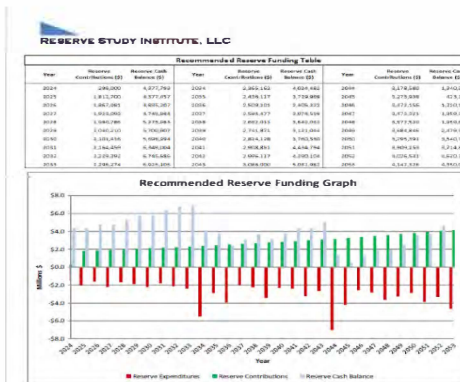
- Brief Introduction
- Financial Scenarios
- Mortgage and Savings Planning
- Tax-Deferred Savings
- Planning for Retirement
- Final Words

Discussion Outline

85.00%

HOW DOES OUR COMPANY HELP YOU

- 1 **Comprehensive Expertise:** Benefit from our comprehensive expertise, including a CPA on staff for financial insight and field analysts with backgrounds in the construction or related industries. The firm is a member of the Association of Professional Reserve Analysts (APRA).
- 2 **Conservative Estimates:** Rely on our commitment to providing conservative estimates, ensuring a productive approach to financial planning for your community association.
- 3 **Specialist Recommendations:** When our field analysts reach their professional limits, we transparently recommend you contact third-party specialists to help ensure the most accurate and reliable results.
- 4 **Client-Centric Approach:** Experience a client-centric approach where your feedback matters; we actively engage with clients, updating studies based on their input to ensure relevancy and accuracy.
- 5 **Clear Communication:** Enjoy clear and consistent communication throughout the process, ensuring you are informed and confident in every step of the reserve study.
- 6 **Reader-Friendly Reports:** Receive reader-friendly reports that stand out for their clarity and accessibility, avoiding the common pitfalls of overly complex documents from other reserve study companies.
- 7 **Responsive Updates:** We prioritize timely updates, responding to client needs, and making necessary changes to keep your reserve study current and actionable.



See Our Experience.



THE COMPONENT'S WE'VE EVALUATED

Experience matters so we want to show you some of the components we've evaluated in the past in other reserve studies so you have peace of mind knowing we have the experience to help you with your study.

**2,360
Components Evaluated**

**By Our Professionals
for Our Clients**

Homeowners' Associations

Homeowners' Associations (HOA's) are usually are usually not responsible for the homes. They include components such as signage, roads, and sidewalks. Some even offer amenities which can include clubhouses, pools, and other recreational elements.



Condominiums and Townhomes

Condos and Townhomes usually include all the elements of an HOA, however, the association is responsible for all common areas and building exteriors. This can include roofs, exterior painting, balconies, and much more.



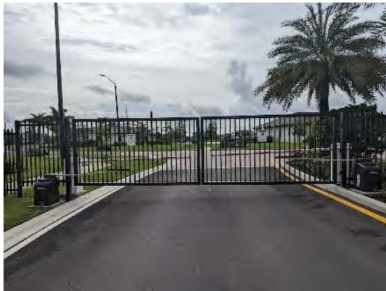
High-Rise Towers

A building that is 15 stories or more is considered a tower. Aside from the sheer mass, towers have unique components not found in HOA's and Condos, such as cooling towers, domestic water pumps, heat exchangers, and more.



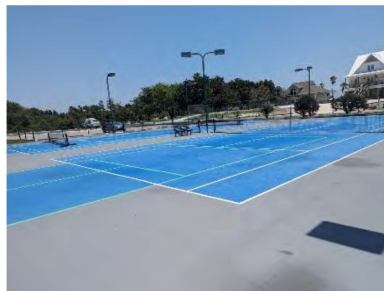
General Site Elements

General site elements are components that are located around the property but are not part of the building. These components include entrance gates, roads, and sidewalks to name a few.



Recreational Elements

Recreational elements are amenities the association is responsible for. This varies between every association and may include playgrounds, tennis courts, and pools.



Mechanical Elements

Mechanical elements can be found in every type of study. This can include HVAC, generators, fire suppression systems and elevator equipment.



Waterfront Elements

Waterfront elements can be very costly and require long-term budgeting. Some of the elements may include docks, seawalls, and even boats for associations located on islands.



Specialty Elements

Each association is unique and oftentimes has specialty components. Some specialty elements associations have reserved for bridge repair and replacement, heavy equipment, and even a sewer treatment plant.





Our Clients Talk.

What is it like working with us?
See What Our Clients Say About Their Experiences.

We want you to have peace of mind of knowing that we have the processes in place so you receive results similar to our past clients.

"If every vendor I did business with was as adept as Reverse Study Institute, every day for Alliance would be more profitable. These days we spend more time managing people despite our #1 task being managing real estate."

-Mr. Leigh Hoffman, Owner
Alliance Property Systems, Inc.

"Thanks for all the help you and your team provided our communities."

-Mr. Ryan Barlingar, LCAM
P&R Housing Management Corporation

"Please accept my humble thanks and appreciation for your recent completion of our HOA's Reserve Study. Your professionalism and comprehensive work made this process far easier for our Board of Directors and Community, than we could ever have imagined."

We dealt primarily with two individuals and their work was outstanding. Mike Russ was available at short notice and responded in a timely manner. Glen Tyndall "Shepherded & Managed" all entries to the Study and kept the process on schedule.

We couldn't have anticipated their willingness to adjust to our requests for additional information in such a timely and efficient manner. Thanks again for your efforts and assistance."

-Mr. Rob Cowan, Treasurer
The Palms at Nocatee Homeowner's Association, Inc.

"That was quick!"

-Mr. Malcolm Ross Cummings,
Board Member and Treasurer
Saphire Cove Homeowner's
Association, Inc.

"Thanks so much Glen. You have been responsive, professional and efficient! Thank you! Your much appreciated."

-Mr. Tony Mastrocola, LCAM
Sentry Management, Inc.

"Thank you so very much. Appreciate the flexibility this first go-round."

-Ms. Catherine Carter, Board
Treasurer
Canterbury Lake Estates
Property Owners Association,
Inc

RESERVE STUDY INSTITUTE, LLC

"Your firm turned around our study so quick."

-Mr. Malcolm Ross Cummings, Board Member and Treasurer
Saphire Cove Homeowner's Association, Inc.

"Thanks so much for the efficiency you have shown."

-Mr. Tony Mastrocola, LCAM
Sentry Management, Inc.

"Wow this is fantastic. Thank you! Your proposal makes sense and no further questions. Per the request of the board I reached out to two other companies, but you are the first to respond and your proposal is perfect with all the details. I will let the board know that you responded so quickly and send them your proposal".

-Ms. Sharon Hill, Community Association Manager
Specialty Management Company

"Thank you Glenn!! You are always on the ball, I can't recommend you enough."

-Ms. Anais Serrano, Community Association Management
Leland Management, Inc.

"I really appreciate the sample of the reserve study, I will save it and I definitely need this for several Associations."

Ms. Karen Preston, LCAM
Sunrise Management, Inc.

"This is great information; I will share with my Boards."

-Ms. Shanique Thompson, LCAM
Phoenix Management Services, Inc.

"Thanks for your efforts and the updates. Appreciate all your efforts, and those of Mike Russ. Very professional and comprehensive report."

-Mr. Rob Cowan, Treasurer
The Palms at Nocatee Homeowner's Association, Inc.

"Thanks for the quick response. I'll be working on our next budget in the next couple of weeks and this report will aid greatly."

-Mr. Walter Wiley, Board Treasurer
Woodland Lakes Homeowners Association, Inc.

"You're highly organized. Let's keep doing business together. Like your firm, mine gets no additional revenue chasing people to coordinate."

-Mr. Leigh Hoffman, Owner
Alliance Property Systems, Inc.

"Thank you for the thorough report your team has provided to us."

-Mr. Brook Ladd, Board Vice President
Baytree Villas Home Owners Association, Inc.

"Thanks for your excellent work."

-Ms. Joanna Patricia Fang, General Executive Manager
First Way Property Management Services, LLC

"Thank you, Glenn, I appreciate your diligent responsiveness!"

-Mr. Alberto Collins, LCAM
Infinity Community Management, Inc.

FREQUENTLY ASKED QUESTIONS (FAQs)

Q: Does a representative have to be on-site?

A: We recommend that someone be onsite because it improves the quality of our services. However, while preferable, it is not required.

Q: How long until we receive a report?

A: We always ask for more time than we think we need in our proposal because we want you to be pleasantly surprised when we are early rather than disappointed if we were to be late.

Q: Can we reserve money in case of hurricane damage?

A: Absolutely. We can generally reserve intangible items like hurricane damage, general contingency, or litigation reserves. However, we will only do this at your direction as we do not reserve for items that we cannot see like this without explicit direction.

Q: Do you have a vendor you recommend for a project?

A: No. Reserve Study Institute does not provide recommendations for ethical reasons.

Q: What do we do if we feel that the cost, remaining useful life, or quantity total should be changed?

A: After receiving the draft, we offer a complimentary editing process within a reasonable amount of time.

Q: Why is there a recommendation to get a quote from a third-party vendor?

A: Many components have variables that we cannot account for. For example, we do not account for any code violations. Using the wrong nail on a roof could be a code violation and require replacement.

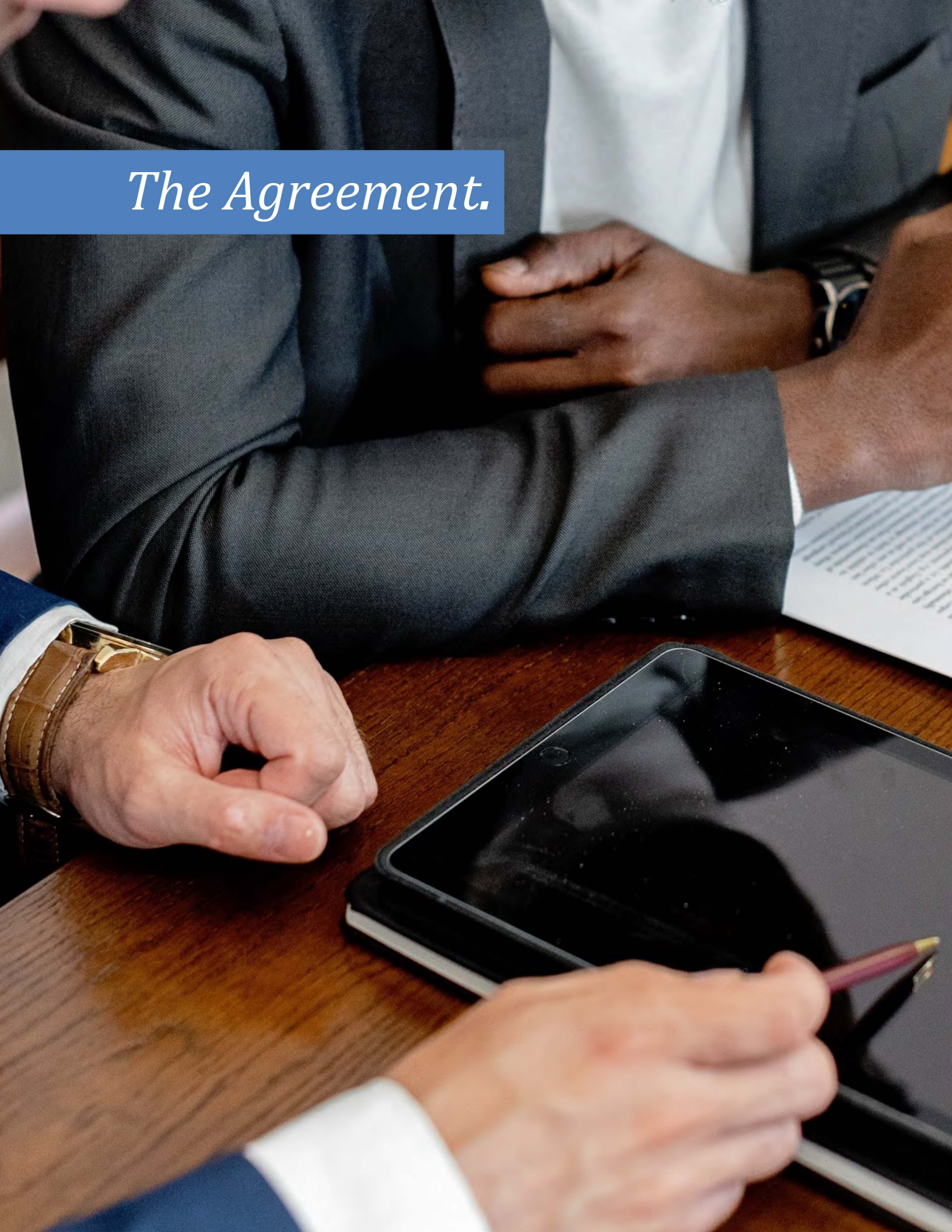
Another example is shoreline restoration. There are many ways to restore a shoreline including grading, geotubing, netting, vegetation, and installing seawalls or rip rap. In this case, we find it best to consult with a certified expert to find what is best for your community.

Q: Can we reserve for repairs for certain items?

A: Yes. There are multiple ways to do this. One is by using the historical data of the repairs that have been done and basing the future repairs on that. Another way is to take a percentage of the total replacement cost and reserve that over a period of time.

For example, there was a study that had approximately \$7 million in bridges. Taking 15% of that over 10 years allows them to reserve approximately \$1 million for repairs every 10 years. This number should also be adjusted based on the age of the structure.

The Agreement.



AGREEMENT

The content provided in the previous sections of this proposal is intended for informational purposes only and does not constitute a legally binding agreement. The legally binding terms and conditions of our services are exclusively outlined in this legal agreement section of the proposal. Clients are advised to carefully review and adhere to the terms set forth in this section of the proposal for the establishment of a contractual agreement with Reserve Study Institute, LLC. This disclaimer helps to distinguish the preliminary information, which is not legally binding, from the specific terms and conditions outlined in this agreement section, which hold legal significance.

SCOPE OF SERVICES

Our Responsibilities

Reserve Study Institute, LLC will perform its services as an independent contractor in accordance with our professional practice standards. Our compensation is not contingent upon our conclusions.

Levels of Service

We offer the following Reserve Study Levels of Service to Associations:

Level 1 – Reserve Study Level 1 with an on-site visual inspection and assessment of property condition. This level of service is offered to clients undertaking their first reserve study, and to Associations in need of a comprehensive review and audit of a previous reserve study. The Association's asset component list and associated measurements are reviewed. Reporting detail includes comprehensive reporting with a full detailed component inventory, photographs, observations and recommendations, life and valuation estimates, fund status, and funding plan.

If this proposal is for the Association's initial reserve study, or a previous reserve study cannot be made available to us, then this level of service is required.

Level 2 – Reserve Study Level 2 update with an on-site visual inspection and property condition assessment. Level 2 reserve studies are for Associations that want to update a previous study. Most Associations will request a Level 2 report in the third year after the last site-visit-based reserve study. Reporting detail includes comprehensive reporting with a full detailed component inventory, photographs, observations and recommendations, life and valuation estimates, fund status, and funding plan.

Level 3 – Reserve Study Level 3 update with no on-site inspection or property condition assessment. This report is typically requested in the years immediately following a reserve study with an on-site review. A prior reserve study is required to establish the basis for the verification and quantification of the component inventory. Reporting detail is standard and includes component inventory, life and valuation estimates, fund status, and funding plan. No condition assessment or photo inventory will be included in the report.

Our inspection and analysis of the subject property is limited to visual observations and is noninvasive when we conduct Level 1 or Level 2 studies. Level 3 studies do not include a site visit for inspection. We will inspect sloped roofs from the ground. We will inspect flat roofs where safe access where safe access

(stairs or ladder permanently attached to the structure) is available. The report is based upon a “snapshot in time” at the moment of our observations. Conditions can change between the time of inspection and the issuance of our report. Reserve Study Institute, LLC does not investigate, nor assume, any responsibility for any existence or impact of any hazardous materials, structural, or latent or hidden defects which may not be present on or within the property. Our opinions of estimated costs and remaining useful lives are not a guarantee of the actual costs of replacement, a warranty of the common elements or other property elements, or a guarantee of remaining useful lives. We are not licensed architects or engineers.

Services Available

Traditional Reserve Study

A Traditional Reserve Study is a comprehensive financial analysis conducted for a property that is for internal, budgetary purposes only. This study assesses the association's long-term capital needs by evaluating the condition and estimated useful life of various physical components, such as roofs, pavements, common areas, and building systems. The goal is to create a detailed reserve plan that outlines anticipated future repair and replacement costs, ensuring that adequate funds are set aside over time to cover these expenses.

Reporting Method

The Association will have the option to select from either a pooled (cash flow) method of reporting and/or a straight-line (component) method of reporting. The Association or its representative must prepare the allocations on a straight-line method in accordance with our components. We will not assist the Association with that process as it requires significant judgment. The Associations' reserve accounts will almost always differ from the reserve components identified in the reserve study. Therefore, we do not guarantee to correspond our study report to the Association's accounting records. **The pooled method of funding will be used unless the straight-line method is requested in writing at the time proposal acceptance is received.**

Your Responsibility

You agree to provide us with access to the subject property during our on-site visual inspection and tour. The Association, management, and/or the Board are responsible for assigning an appropriate individual as our primary point of contact to coordinate the reserve study and to provide to us to the best of their ability and if reasonably available, historical and budgetary information, the governing documents, and other information that we request and deem necessary to complete our Study. You agree to pay reasonable attorneys' fees and any other costs incurred in the event we have to initiate litigation to collect any unpaid balance for our services. Management and the Board may be required to sign a representation letter that acknowledges the review and approval of the report.

Assumptions and Indemnification

We assume, without independent verification, the accuracy of all data provided to us. You agree to indemnify and hold us harmless against and from any and all losses, claims, actions, damages, expenses,

liabilities, including reasonable attorney's fees, to which we may become subject in connection with this engagement, because of any false, misleading, or incomplete information that we have relied upon as supplied by you or others under your direction, or which may result from any improper use or reliance on the report by you or third parties under your control or direction. Your obligation for indemnification reimbursement and reimbursement shall extend to any controlling person of Reserve Study Institute, LLC, including any director, officer, employee, affiliate, or agent. Liability of Reserve Study Institute, LLC and its employees, affiliates, and agents for errors and omissions, if any, in this work is limited to the amount of its compensation for the work performed in this engagement. We are not licensed architects or engineers.

Report

Reserve Study Institute, LLC will complete the services in accordance with this Proposal based on your selection of Service Level and Reporting Detail. We will consider any additional information made available to us in the interest of promptly issuing a Final Report. However, the Report represents a valid opinion of our findings and recommendations and is deemed complete after we receive the signed management representation letter. We retain the right to withhold the Draft Report or Final Report if payment for services is not rendered in a timely manner.

Retention and Propriety of Work Papers

All files, work papers, or documents developed (the "work papers") by us during the course of the engagement is proprietary and remain our property. In all cases, we will retain our work papers for a period of three (3) years.

Restricted Use of Our Report

The use of our Report is limited to only the purpose stated herein. Any use or reliance for any other purpose, by you or third parties, is invalid. Our Reserve Study Report, in whole or part, is not and cannot be used as a design specification, design engineering services, or an appraisal. You may show our report in its entirety to those third parties who need to review the information contained herein. The Client and other third parties viewing this report should not reference our name or our report, in whole or in part, in any document prepared and/or distributed to third parties without our written consent. This report contains intellectual property developed by Reserve Study Institute, LLC specific to this engagement and cannot be reproduced or distributed to those who conduct reserve studies without the expressed written consent of Reserve Study Institute, LLC.

Client Confidentiality

By entering into his agreement, you grant us the rights and a perpetual license to use, reproduce, display, and distribute your association's name, logo, testimonials, and related information ("Client Information") for various purposes, including but not limited to creating training materials, advertising, promotions, testimonials, software development, and other commercial and non-commercial activities without compensation. However, we will maintain the confidentiality of all conversations, documents provided to us, and the contents of our reports, subject to legal or administrative processes or proceedings. These conditions can only be modified by written documents executed by both parties.

Software Development Disclaimer

Throughout the course of our engagement, you may come into contact with software, applications, or other intellectual property under development by us. It is essential to clarify that our collaboration does not constitute a joint venture, partnership, or any shared ownership in the development process. All rights, including but not limited to copyrights, trademarks, and intellectual property rights, associated

with the software and related materials remain the sole and exclusive property of Reserve Study Institute, LLC and its affiliates, subsidiaries, successors, assigns, and heirs. Any feedback, suggestions, or ideas provided by you in the course of our collaboration do not grant you any ownership or rights in the developed software. This disclaimer serves to make explicit that the software, its components, and associated intellectual property are proprietary assets and our property, and you shall have no claims or rights to assert ownership, authorship, or any form of intellectual property rights therein. Our collaboration is not intended to create any obligations on our part to share ownership or provide any proprietary rights in the developed software or any other intellectual property we develop.

PROPOSED TIMELINE

This proposal is valid for thirty (30) days from the day it is prepared. Price, timeline, terms, and availability may be subject to change thereafter.

We intend to have our Draft Report to you for review and approval on or around **October 15, 2024**. All documentation requested will need to be provided by the Association's representative to us at least sixty (60) days prior to the date we anticipate having the Draft Report to you. If an onsite visit is necessary, then we require the onsite visit at least sixty (60) days before the date we anticipate having the Draft Report to you. You will be given a period of thirty (30) days from the date of receipt of the initial report to review and provide any edits, comments, or issues to us. In the absence of any response, edits, or issues raised, the report shall be deemed accepted as presented and we reserve the right to issue a final signed copy of the report. All edits, comments, or issues pertaining to the report must be presented in writing in a single email within the specified thirty (30) day review period. We shall not be obligated to consider or address edits submitted in a piecemeal fashion or through multiple, separate communications. This clause ensures that all edits are presented in an organized manner and helps us efficiently process these edits.

Our proposed timeline is based on the anticipated cooperation from your personnel. You agree to indemnify us if we are unable to meet the proposed timeline if you require rescheduling or rescheduling due to inclement weather, transportation issues (such as canceled or delayed flights), or any other issues that are reasonably beyond our control. We will attempt to reschedule any onsite visits, if necessary, and complete our services as soon as reasonably possible. However, you understand that if rescheduling is needed for any reason, we provide no assurance or guarantee of when we will be able to reschedule given that we may have other client commitments. Our Final Report will be issued to you in electronic format only.

Multiple Reports Needed

Our report is designed to yield one (1) reserve contribution for all components included in that report. Unless otherwise noted, this proposal will have one (1) recommended contribution amount for one (1) client. If there are multiple associations, multiple neighborhoods with separate budgets, or some components are not shared equally by all owners, then separate reports will be needed. We will proceed with producing one (1) report as per this proposal unless we receive written authorization via email to proceed at an agreed-upon fee for service for the additional work in the event multiple reports are needed.

Not Engineers or Architects

Reserve Study Institute, LLC is not a licensed architectural or engineering firm and this proposal is not for design, build, construction, or engineering purposes.

FEES AND BILLING

Billing and Fee for Services and Conditions

The retainer, if any, is due upon acceptance of the proposal for services, and no work will commence until the retainer has been received by Reserve Study Institute, LLC. The Association may be progress billed as work proceeds with payment due immediately upon request as outlined in the fee schedule summary on the signature page of this proposal. Otherwise, the payment of all fees is due when we deliver or try to deliver the receipt of the Draft Report by email.

We do **NOT** charge any out-of-pocket costs for mileage, travel, lodging, or meals for a single trip. However, if a second trip is required through no fault of Reserve Study Institute, LLC, additional charges for travel, lodging, and other associated costs will apply. Mileage will be reimbursed based on IRS-approved mileage rates at the time of travel if a second trip is required. We reserve the right to suspend all work if there is an outstanding balance of more than thirty (30) days from the date of the invoice. Any outstanding balance after thirty (30) days from the date of the invoice will also be subject to an interest charge of 1.5% per month. Any litigation necessary to collect an unpaid balance shall be venued in Duval County of Florida. The Association will be responsible for payment of reasonable attorney fees to Reserve Study Institute, LLC in the event of litigation to collect any unpaid balances and reserves the right to charge the Association any and all fees, including mileage, meals, lodging, and other associated out-of-pocket costs incurred during the first trip in the event collections proceeding are initiated due to a delay in timely payment.

SUMMARY

We look forward to working with your Association on this effort, and should you have any questions regarding our proposal, please contact our office at (904) 568-2839.

Respectfully Submitted,



Reserve Study Institute, LLC
Jacksonville, Florida



RESERVE STUDY INSTITUTE, LLC

Acceptance of Proposal

Please select one box below to indicate the service selected:

<i>Fee Schedule for Service Level</i>			
Service Includes	Traditional Reserve Study		
	Level 1	Level 2	Level 3
Full Reserve Study	✓		
Establish Reserve Quantities	✓		
Establish Component List	✓		
Site Visit	✓	✓	
Condition Assessment	✓	✓	
Photo Inventory	✓	✓	
Component Inventory	✓	✓	✓
Life & Value Estimates	✓	✓	✓
Reserve Funding Plan	✓	✓	✓
When Payment Due	Fee for Service		
Retainer Prior to Start	N/A	N/A	N/A
Due Upon Draft Report	\$ 6,125	N/A	N/A
Total Fee For Service	\$ 6,125	N/A	N/A
Select One to Select Service	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTE: A Level I/Initial Study is required if no previous study is available.

I have read, understand, and accept the terms of the proposal and acknowledge that I have the authority to legally bind the Association to this agreement. I hereby acknowledge that I understand Reserve Study Institute, LLC is not operating as a licensed engineering or architectural firm.

ASSOCIATION REPRESENTATIVE:

Name

Date

Signature

Title



Only When Ready.