



Rizzetta & Company

K-Bar Ranch Community Development District

**Board of Supervisors' Meeting
December 7, 2022**

**District Office:
5844 Old Pasco Road, Suite 100
Wesley Chapel, FL 33544
813-994-1001**

www.kbarranchcdd.com

K-BAR RANCH COMMUNITY DEVELOPMENT DISTRICT

K Bar Ranch Amenity Center 10820 Mistflower Lane, Tampa, FL 33647

Board of Supervisors

Vicki Shuster
Frank Morales
John Bowersox
Edmund Radigan
Cynthia Gustavel

District Manager

Lynn Hayes

Rizzetta & Company, Inc.

District Counsel

Vivek Babbar

Straley Robin & Vericker

District Engineer

Tonja Stewart

Stantec Consulting

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

The Audience Comment portion of the agenda is where individuals may make comments on matters that concern the District. Individuals are limited to a total of three (3) minutes to make comments during this time.

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 (813) 994-1001. 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.

November 30, 2022

Board of Supervisors
K-Bar Ranch Community
Development District

FINAL AGENDA

Dear Board Members:

The Regular Meeting of the Board of Supervisors of the K-Bar Ranch Community Development District will be held on **Wednesday, December 7, 2022, at 6:00 p.m.** at the K-Bar Ranch II Amenity Center, located at 10820 Mistflower Lane, Tampa, FL 33647. The following is the Final Agenda for the meeting.

- 1. CALL TO ORDER/ROLL CALL**
- 2. AUDIENCE COMMENTS**
- 3. BUSINESS ADMINISTRATION**
 - A.** Administer the Oath of Office to Newly Elected Supervisors
 - 1.** Review of Form 1 and Sunshine Law Requirements..... Tab 1
 - 2.** Consideration of Resolution 2023-01; Designating Officers of the District Tab 2
 - 3.** Consideration of the Minutes of the Board of Supervisors Meeting on November 2, 2022..... Tab 3
 - 4.** Consideration of the Operation and Maintenance Expenditures for September 2022 Tab 4
- 4. BUSINESS ITEMS**
 - A.** Presentation of the Landscape Specialist Inspection Report and Landscaper Comments Tab 5
 - B.** Presentation of Aquatics Report..... Tab 6
 - C.** Discussion to Terminate the Interlocal Agreement between K-Bar Ranch CDD and K-Bar Ranch II CDD
 - D.** Consideration of the Revised Yellowstone Landscaping Maintenance Quote for Interlocal Agreement Areas Tab 7
 - E.** Consideration of the Yellowstone Landscaping Quote to Remove Trees along Wild Tamarind near Stone Creek (**Under Separate Cover**)
 - F.** Consideration of the Yellowstone Landscaping Quotes to Remove the Dead Sylvester Palm on Verdant Pasture and Replace with Shrubs..... Tab 8
 - G.** Consideration of The Pool Works Pool Resurface and LED Lights Quotes.....Tab 9

K-BAR RANCH COMMUNITY DEVELOPMENT DISTRICT

District Office · Wesley Chapel, Florida (813) 994-1001

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

WWW.KBARRANCHCDD.COM

5. STAFF REPORTS

A. District Chairperson

B. District Counsel

C. District Engineer

D. District Manager Report..... Tab 10

6. 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 (813) 994-1001.

Sincerely,
Lynn Hayes
District Manager

Tab 1

**K-BAR RANCH
COMMUNITY DEVELOPMENT DISTRICT
BOARD OF SUPERVISOR
OATH OF OFFICE**

I, _____, A CITIZEN OF THE STATE OF FLORIDA AND OF THE UNITED STATES OF AMERICA, AND BEING EMPLOYED BY OR AN OFFICER OF K-BAR RANCH COMMUNITY DEVELOPMENT DISTRICT AND A RECIPIENT OF PUBLIC FUNDS AS SUCH EMPLOYEE OR OFFICER, DO HEREBY SOLEMNLY SWEAR OR AFFIRM THAT I WILL SUPPORT THE CONSTITUTION OF THE UNITED STATES AND THE STATE OF FLORIDA.

Board Supervisor Signature

ACKNOWLEDGMENT OF OATH BEING TAKEN

STATE OF FLORIDA
COUNTY OF HILLSBOROUGH

On this ____ day of _____, 20____, sworn to (or affirmed) and subscribed before me by means of ____ physical presence or ____ online notarization, this ____ day of _____, 2022 by _____, to me well known and known to me to be the person described in and who took the aforementioned oath as a Board Member of the Board of Supervisors of K-Bar Ranch Community Development District and acknowledged to and before me that they took said oath for the purposes therein expressed.

WITNESS my hand and official seal the date aforesaid.

Notary Public
STATE OF FLORIDA

My commission expires on: _____

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FORM 1**STATEMENT OF
FINANCIAL INTERESTS****2021**Please print or type your name, mailing
address, agency name, and position below:**FOR OFFICE USE ONLY:**

LAST NAME -- FIRST NAME -- MIDDLE NAME :

MAILING ADDRESS :

CITY : ZIP : COUNTY :

NAME OF AGENCY :

NAME OF OFFICE OR POSITION HELD OR SOUGHT :

CHECK ONLY IF ☐ CANDIDATE OR ☐ NEW EMPLOYEE OR APPOINTEE****** THIS SECTION MUST BE COMPLETED ********DISCLOSURE PERIOD:**

THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR CALENDAR YEAR ENDING DECEMBER 31, 2021.

MANNER OF CALCULATING REPORTABLE INTERESTS:

FILERS HAVE THE OPTION OF USING REPORTING THRESHOLDS THAT ARE ABSOLUTE DOLLAR VALUES, WHICH REQUIRES FEWER CALCULATIONS, OR USING COMPARATIVE THRESHOLDS, WHICH ARE USUALLY BASED ON PERCENTAGE VALUES (see instructions for further details). CHECK THE ONE YOU ARE USING (**must check one**):

☐ **COMPARATIVE (PERCENTAGE) THRESHOLDS** OR ☐ **DOLLAR VALUE THRESHOLDS****PART A -- PRIMARY SOURCES OF INCOME** [Major sources of income to the reporting person - See instructions]
(If you have nothing to report, write "none" or "n/a")

NAME OF SOURCE OF INCOME	SOURCE'S ADDRESS	DESCRIPTION OF THE SOURCE'S PRINCIPAL BUSINESS ACTIVITY

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

NAME OF BUSINESS ENTITY	NAME OF MAJOR SOURCES OF BUSINESS' INCOME	ADDRESS OF SOURCE	PRINCIPAL BUSINESS ACTIVITY OF SOURCE

PART C -- REAL PROPERTY [Land, buildings owned by the reporting person - See instructions]
(If you have nothing to report, write "none" or "n/a")**You are not limited to the space on the
lines on this form. Attach additional
sheets, if necessary.****FILING INSTRUCTIONS** for when
and where to file this form are
located at the bottom of page 2.**INSTRUCTIONS** on who must file
this form and how to fill it out
begin on page 3.

PART D — INTANGIBLE PERSONAL PROPERTY [Stocks, bonds, certificates of deposit, etc. - See instructions]
(If you have nothing to report, write "none" or "n/a")

TYPE OF INTANGIBLE	BUSINESS ENTITY TO WHICH THE PROPERTY RELATES

PART E — LIABILITIES [Major debts - See instructions]
(If you have nothing to report, write "none" or "n/a")

NAME OF CREDITOR	ADDRESS OF CREDITOR

PART F — INTERESTS IN SPECIFIED BUSINESSES [Ownership or positions in certain types of businesses - See instructions]
(If you have nothing to report, write "none" or "n/a")

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2
NAME OF BUSINESS ENTITY		
ADDRESS OF BUSINESS ENTITY		
PRINCIPAL BUSINESS ACTIVITY		
POSITION HELD WITH ENTITY		
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS		
NATURE OF MY OWNERSHIP INTEREST		

PART G — TRAINING For elected municipal officers, appointed school superintendents, and commissioners of a community redevelopment agency created under Part III, Chapter 163 required to complete annual ethics training pursuant to section 112.3142, F.S.

☐ **I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.**

IF ANY OF PARTS A THROUGH G ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE ☐

SIGNATURE OF FILER:

Signature:

Date Signed:

CPA or ATTORNEY SIGNATURE ONLY

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, _____, prepared the CE Form 1 in accordance with Section 112.3145, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

CPA/Attorney Signature: _____

Date Signed: _____

FILING INSTRUCTIONS:

If you were mailed the form by the Commission on Ethics or a County Supervisor of Elections for your annual disclosure filing, return the form to that location. To determine what category your position falls under, see page 3 of instructions.

Local officers/employees file with the Supervisor of Elections of the county in which they permanently reside. (If you do not permanently reside in Florida, file with the Supervisor of the county where your agency has its headquarters.) Form 1 filers who file with the Supervisor of Elections may file by mail or email. Contact your Supervisor of Elections for the mailing address or email address to use. Do not email your form to the Commission on Ethics, it will be returned.

State officers or specified state employees who file with the Commission on Ethics may file by mail or email. To file by mail, send the completed form to P.O. Drawer 15709, Tallahassee, FL 32317-5709; physical address: 325 John Knox Rd, Bldg E, Ste 200, Tallahassee, FL 32303. To file with the Commission by email, scan your completed form and any attachments as a pdf (do not use any other format), send it to CEForm1@leg.state.fl.us and retain a copy for your records. Do not file by both mail and email. Choose only one filing method. Form 6s will not be accepted via email.

Candidates file this form together with their filing papers.

MULTIPLE FILING UNNECESSARY: A candidate who files a Form 1 with a qualifying officer is not required to file with the Commission or Supervisor of Elections.

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

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

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

Finally, file a final disclosure form (Form 1F) within 60 days of leaving office or employment. Filing a CE Form 1F (Final Statement of Financial Interests) does not relieve the filer of filing a CE Form 1 if the filer was in his or her position on December 31, 2021.

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FLORIDA COMMISSION ON ETHICS



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

2022

State of Florida

COMMISSION ON ETHICS

Michelle Anchors
Fort Walton Beach

Antonio Carvajal
Tallahassee

Travis Cummings
Fleming Island

Don Gaetz
Niceville

Glenton “Glen” Gilzean, Jr.
Orlando

John Grant
Tampa

Joanne Leznoff
Fernandina Beach

William “Willie” N. Meggs
Tallahassee

Jim Waldman
Fort Lauderdale

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

*Please direct all requests for information to this number.

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I. HISTORY OF FLORIDA’S ETHICS LAWS

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

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

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

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

In 2018, Florida’s Constitutional Revision Commission proposed, and the voters adopted, changes to Article II, Section 8. The earliest of the changes will take effect December 31, 2020, and will prohibit officials from abusing their position to obtain a disproportionate benefit for themselves or their spouse, child, or employer, or for a business with which the official contracts or is an officer, partner, director, sole proprietor, or in which the official owns an interest. Other changes made to the Constitution place restrictions on lobbying by certain officeholders and employees, and put additional limits on lobbying by former public officers and employees. These changes will become effective December 31, 2022.

II. ROLE OF THE COMMISSION ON ETHICS

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

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

III. THE ETHICS LAWS

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

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

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

A. PROHIBITED ACTIONS OR CONDUCT

1. *Solicitation and Acceptance of Gifts*

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

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

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

However, notwithstanding Sec. 112.3148, Fla. Stat., no Executive Branch lobbyist or principal shall make, directly or indirectly, and no Executive Branch agency official who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.] Typically, this would include gifts valued at less than \$100 that formerly were permitted under Section 112.3148, Fla. Stat. Similar rules apply to members and employees of the Legislature. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.]

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

2. *Unauthorized Compensation*

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

3. Misuse of Public Position

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

4. Abuse of Public Position

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

5. Disclosure or Use of Certain Information

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

6. Solicitation or Acceptance of Honoraria

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

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

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

However, notwithstanding Sec. 112.3149, Fla. Stat., no Executive Branch or legislative lobbyist or principal shall make, directly or indirectly, and no Executive Branch agency official who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.] This may include honorarium event related expenses that formerly

were permitted under Sec. 112.3149, Fla. Stat. Similar rules apply to members and employees of the Legislature. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.]

B. PROHIBITED EMPLOYMENT AND BUSINESS RELATIONSHIPS

1. Doing Business With One's Agency

(a) A public employee acting as a purchasing agent, or public officer acting in an official capacity, is prohibited from purchasing, renting, or leasing any realty, goods, or services for his or her agency from a business entity in which the officer or employee or his or her spouse or child owns more than a 5% interest. [Sec. 112.313(3), Fla. Stat.]

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

2. Conflicting Employment or Contractual Relationship

(a) A public officer or employee is prohibited from holding any employment or contract with any business entity or agency regulated by or doing business with his or her public agency. [Sec. 112.313(7), Fla. Stat.]

(b) A public officer or employee also is prohibited from holding any employment or having a contractual relationship which will pose a frequently recurring conflict between the official's private interests and public duties or which will impede the full and faithful discharge of the official's public duties. [Sec. 112.313(7), Fla. Stat.]

(c) Limited exceptions to this prohibition have been created in the law for legislative bodies, certain special tax districts, drainage districts, and persons whose professions or occupations qualify them to hold their public positions. [Sec. 112.313(7)(a) and (b), Fla. Stat.]

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

(a) When the business is rotated among all qualified suppliers in a city or county.

(b) When the business is awarded by sealed, competitive bidding and neither the official nor his or her spouse or child have attempted to persuade agency personnel to enter the contract. NOTE:

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

(c) When the purchase or sale is for legal advertising, utilities service, or for passage on a common carrier.

(d) When an emergency purchase must be made to protect the public health, safety, or welfare.

(e) When the business entity is the only source of supply within the political subdivision and there is full disclosure of the official's interest to the governing body on Commission FORM 4A.

(f) When the aggregate of any such transactions does not exceed \$500 in a calendar year.

(g) When the business transacted is the deposit of agency funds in a bank of which a county, city, or district official is an officer, director, or stockholder, so long as agency records show that the governing body has determined that the member did not favor his or her bank over other qualified banks.

(h) When the prohibitions are waived in the case of ADVISORY BOARD MEMBERS by the appointing person or by a two-thirds vote of the appointing body (after disclosure on Commission FORM 4A).

(i) When the public officer or employee purchases in a private capacity goods or services, at a price and upon terms available to similarly situated members of the general public, from a business entity which is doing business with his or her agency.

(j) When the public officer or employee in a private capacity purchases goods or services from a business entity which is subject to the regulation of his or her agency where the price and terms of the transaction are available to similarly situated members of the general public and the officer or employee makes full disclosure of the relationship to the agency head or governing body prior to the transaction.

4. Additional Exemptions

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

5. Legislators Lobbying State Agencies

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

6. Employees Holding Office

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

7. Professional and Occupational Licensing Board Members

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

8. Contractual Services: Prohibited Employment

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

9. Local Government Attorneys

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

10. Dual Public Employment

Candidates and elected officers are prohibited from accepting public employment if they know or should know it is being offered for the purpose of influence. Further, public employment may not be accepted unless the position was already in existence or was created without the anticipation of the official's interest, was publicly advertised, and the officer had to meet the same qualifications and go through the same hiring process as other applicants. For elected public officers already holding public

employment, no promotion given for the purpose of influence may be accepted, nor may promotions that are inconsistent with those given other similarly situated employees. [Sec. 112.3125, Fla. Stat.]

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

1. Anti-Nepotism Law

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

2. Additional Restrictions

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

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

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

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

2. Lobbying by Former State Employees

Certain employees of the executive and legislative branches of state government are prohibited from personally representing another person or entity for compensation before the

agency with which they were employed for a period of two years after leaving their positions, unless employed by another agency of state government. [Sec. 112.313(9), Fla. Stat.] These employees include the following:

(a) Executive and legislative branch employees serving in the Senior Management Service and Selected Exempt Service, as well as any person employed by the Department of the Lottery having authority over policy or procurement.

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

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

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

3. Additional Restrictions on Former State Employees

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

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

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

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

4. Lobbying by Former Local Government Officers and Employees

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

E. VOTING CONFLICTS OF INTEREST

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

No county, municipal, or other local public officer shall vote in an official capacity upon any measure which would inure to his or her special private gain or loss, or which the officer knows would inure to the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate. The officer must publicly announce the nature of his or her interest before the vote and must file a memorandum of voting conflict on Commission Form 8B with the meeting's recording officer within 15 days after the vote occurs disclosing the nature of his or her interest in the matter. However, members of

community redevelopment agencies and district officers elected on a one-acre, one-vote basis are not required to abstain when voting in that capacity.

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

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

F. DISCLOSURES

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

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

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

1. FORM 1 - Limited Financial Disclosure

Who Must File:

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

STATE OFFICERS include:

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

LOCAL OFFICERS include:

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

3) Any other appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.

4) Persons holding any of these positions in local government: mayor; county or city manager; chief administrative employee or finance director of a county, municipality, or other political subdivision; county or municipal attorney; chief county or municipal building inspector; county or municipal water resources coordinator; county or municipal pollution control director; county or municipal environmental control director; county or municipal administrator with power to grant or deny a land development permit; chief of police; fire chief; municipal clerk; appointed district school superintendent; community college president; district medical examiner; purchasing agent (regardless of title) having the authority to make any purchase exceeding \$35,000 for the local governmental unit.

5) Members of governing boards of charter schools operated by a city or other public entity.

6) The officers, directors, and chief executive officer of a corporation, partnership, or other business entity that is serving as the chief administrative or executive officer or employee of a political subdivision, and any business entity employee who is acting as the chief administrative or executive officer or employee of the political subdivision. [Sec. 112.3136, Fla. Stat.]

SPECIFIED STATE EMPLOYEE includes:

1) Employees in the Office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.

2) The following positions in each state department, commission, board, or council: secretary or state surgeon general, assistant or deputy secretary, executive director, assistant or deputy executive director, and anyone having the power normally conferred upon such persons, regardless of title.

3) The following positions in each state department or division: director, assistant or deputy director, bureau chief, assistant bureau chief, and any person having the power normally conferred upon such persons, regardless of title.

4) Assistant state attorneys, assistant public defenders, criminal conflict and civil regional counsel, assistant criminal conflict and civil regional counsel, public counsel, full-time state employees serving as counsel or assistant counsel to a state agency, judges of compensation claims, administrative law judges, and hearing officers.

- 5) The superintendent or director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.
- 6) State agency business managers, finance and accounting directors, personnel officers, grant coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$35,000.
- 7) The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions and legislative assistants exempted by the presiding officer of their house); and each employee of the Commission on Ethics.

What Must Be Disclosed:

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

When to File:

CANDIDATES for elected local office must file FORM 1 together with and at the same time they file their qualifying papers.

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

Where to File:

Each LOCAL OFFICER files FORM 1 with the Supervisor of Elections in the county in which he or she permanently resides.

A STATE OFFICER or SPECIFIED STATE EMPLOYEE files with the Commission on Ethics. [Sec. 112.3145, Fla. Stat.]

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

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

3. *FORM 2 - Quarterly Client Disclosure*

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

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

When to File:

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

Where To File:

LOCAL OFFICERS file with the Supervisor of Elections of the county in which they permanently reside.

STATE OFFICERS and SPECIFIED STATE EMPLOYEES file with the Commission on Ethics. [Sec. 112.3145(4), Fla. Stat.]

4. *FORM 6 - Full and Public Disclosure*

Who Must File:

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

What Must be Disclosed:

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

When and Where To File:

Incumbent officials must file FORM 6 annually by July 1 with the Commission on Ethics. CANDIDATES must file with the officer before whom they qualify at the time of qualifying. [Art. II, Sec. 8(a) and (i), Fla. Const., and Sec. 112.3144, Fla. Stat.]

Beginning January 1, 2022, all Form 6 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable on the Commission's website.

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

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

6. *FORM 9 - Quarterly Gift Disclosure*

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

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

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

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

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

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

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

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

However, notwithstanding Sec. 112.3149, Fla. Stat., no executive branch or legislative lobbyist or principal shall make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the

purpose of lobbying. This may include gifts or honorarium event related expenses that formerly were permitted under Sections 112.3148 and 112.3149. [Sec. 112.3215, Fla. Stat.] Similar prohibitions apply to legislative officials and employees. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.] In addition, gifts, which include anything not primarily related to political activities authorized under ch. 106, are prohibited from political committees. [Sec. 112.31485 Fla. Stat.]

8. *FORM 30 - Donor's Quarterly Gift Disclosure*

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

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

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

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

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

IV. AVAILABILITY OF FORMS

LOCAL OFFICERS and EMPLOYEES who must file FORM 1 annually will be sent the form by mail from the Supervisor of Elections in the county in which they permanently reside not later than JUNE 1 of each year. Newly elected and appointed officials or employees should contact the heads of their agencies for copies of the form or download it from www.ethics.state.fl.us, as should those persons who are required to file their final disclosure statements within 60 days of leaving office or employment. The Form 1 will be filed electronically with the Florida Commission on Ethics via the Electronic Financial Disclosure Management System (EFDMS), beginning in 2023.

Beginning January 1, 2022, ELECTED CONSTITUTIONAL OFFICERS and other officials who must file Form 6 annually must file electronically via the Commission's Electronic Financial Disclosure Management System (EFDMS). Paper forms will not be promulgated. Communications regarding the annual filing requirement will be sent via email to filers no later than June 1. Form 6 filers will receive an emailed invitation to register for EFDMS in March 2022. Filers requiring earlier access should contact the Commission to request an invitation. Filers must maintain an updated email address in their User Profile in EFDMS.

OTHER STATE OFFICERS, and SPECIFIED STATE EMPLOYEES who must file Form 1 annually will be sent the forms by mail from the Florida Commission on Ethics by June 1, 2022. Newly elected and appointed officers and employees should contact the head of their agencies for copies of the form or download the form from www.ethics.state.fl.us, as should those persons who are required to file their final financial disclosure statement within 60 days of leaving office or employment.

V. PENALTIES

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

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

B. Penalties for Candidates

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

C. Penalties for Former Officers and Employees

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

D. Penalties for Lobbyists and Others

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

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

E. Felony Convictions: Forfeiture of Retirement Benefits

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

F. Automatic Penalties for Failure to File Annual Disclosure

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

VI. ADVISORY OPINIONS

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

A. Who Can Request an Opinion

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

B. How to Request an Opinion

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

C. How to Obtain Published Opinions

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

VII. COMPLAINTS

A. Citizen Involvement

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

If you have knowledge that a person in government has violated the standards of conduct or disclosure laws described above, you may report these violations to the Commission by filing a sworn complaint on the form prescribed by the Commission and available for download at

www.ethics.state.fl.us. The Commission is unable to take action based on learning of such misdeeds through newspaper reports, telephone calls, or letters.

You can obtain a complaint form (FORM 50), by contacting the Commission office at the address or phone number shown on the inside front cover of this booklet, or you can download it from the Commission's website:

www.ethics.state.fl.us.

B. Referrals

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

C. Confidentiality

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

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

D. How the Complaint Process Works

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

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

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

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

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

E. Dismissal of Complaints At Any Stage of Disposition

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

F. Statute of Limitations

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

VIII. EXECUTIVE BRANCH LOBBYING

Any person who, for compensation and on behalf of another, lobbies an agency of the executive branch of state government with respect to a decision in the area of policy or procurement may be required to register as an executive branch lobbyist. Registration is required before lobbying an agency and is renewable annually. In addition, each lobbying firm must file a compensation report with the Commission for each calendar quarter during any portion of which one or more of the firm's lobbyists were registered to represent a principal. As noted above, no executive branch lobbyist or principal can make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 can knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.]

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

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

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

Executive Branch Lobbyist Registration
Room G-68, Claude Pepper Building
111 W. Madison Street
Tallahassee, FL 32399-1425
Phone: 850/922-4987

IX. WHISTLE-BLOWER'S ACT

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

While this language is contained within the Code of Ethics, the Commission has no jurisdiction or authority to proceed against persons who violate this Act. Therefore, a person who has disclosed

information alleging improper conduct governed by this law and who may suffer adverse consequences as a result should contact one or more of the following: the Office of the Chief Inspector General in the Executive Office of the Governor; the Department of Legal Affairs; the Florida Commission on Human Relations; or a private attorney. [Sec. 112.3187 - 112.31895, Fla. Stat.]

X. ADDITIONAL INFORMATION

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

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

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

XI. TRAINING

Constitutional officers, elected municipal officers, and commissioners of community redevelopment agencies (CRAs) are required to receive a total of four hours training, per calendar year, in the area of ethics, public records, and open meetings. The Commission on Ethics does not track compliance or certify providers.

Visit the training page on the Commission's website for up-to-date rules, opinions, audio/video training, and opportunities for live training conducted by Commission staff. A comprehensive online training course addressing Florida's Code of Ethics, as well as Sunshine Law, and Public Records Act is available via a link on the Commission's homepage.

Tab 2

RESOLUTION 2023-01

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE K-BAR RANCH COMMUNITY DEVELOPMENT DISTRICT REDESIGNATING THE OFFICERS OF THE DISTRICT AND PROVIDING FOR AN EFFECTIVE DATE

WHEREAS, the K-Bar Ranch Community Development District (hereinafter the "District") is a local unit of special-purpose government created and existing pursuant to Chapter 190, Florida Statutes, being situated entirely within Hillsborough County, Florida; and

WHEREAS, the Board of Supervisors of the District desires to re-designate the Officers of the District.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF K-BAR RANCH COMMUNITY DEVELOPMENT DISTRICT:

Section 1. _____ is appointed Chairperson.

Section 2. _____ is appointed Vice Chairperson.

Section 3. _____ is appointed Assistant Secretary.

_____ is appointed Assistant Secretary.

_____ is appointed Assistant Secretary.

Lynn Hayes is appointed Assistant Secretary.

Darryl Adams is appointed Assistant Secretary.

Section 5. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED THIS 7 TH DAY OF DECEMBER, 2022.

**K-BAR RANCH COMMUNITY
DEVELOPMENT DISTRICT**

Chair/Vice Chair

Attest:

Secretary/Assistant Secretary

Tab 3

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.

K-BAR RANCH COMMUNITY DEVELOPMENT DISTRICT

The Regular Meeting of the Board of Supervisors of the K-Bar Ranch Community Development District was held on **Wednesday, November 2, 2022, at 6:00 p.m.**, at the K- Bar Ranch II Amenity Center located at 10820 Mistflower Lane, Tampa, FL 33647.

Present and Constituting a Quorum:

Vicki Shuster	Board Supervisor, Chairperson
Dr. Christiane Rinck	Board Supervisor, Vice Chairperson
Edmund Radigan	Board Supervisor, Assistant Secretary <i>(via telephone approximately 6:29 p.m.)</i>
John Bowersox	Board Supervisor, Assistant Secretary
Cynthia Gustavel	Board Supervisor, Assistant Secretary

Also Present:

Lynn Hayes	District Manager, Rizzetta & Company, Inc.
Vivek Babbar	District Counsel, Straley, Robin & Vericker
Tonja Stewart	District Engineer, Stantec Consulting <i>(via telephone)</i>
Josh Oliva	Representative, Yellowstone Landscape
Virgil Stoltz	Representative, Blue Water Aquatics

Audience

Present

FIRST ORDER OF BUSINESS

Call to Order

Mr. Lynn Hayes called the meeting to order and conducted roll call.

SECOND ORDER OF BUSINESS

Audience Comments

An audience member commented on sidewalk cleaning.

THIRD ORDER OF BUSINESS

**Consideration of the Minutes of the
Board of Supervisors Meeting held
on October 5, 2022**

Mr. Lynn Hayes presented the Minutes of the Board of Supervisors Meeting held on October 5, 2022 and asked if there were any amendments necessary.

On a motion by Ms. Vicki Shuster and seconded by Ms. Cynthia Gustavel, with all in favor, the Board of Supervisors approved the Meeting Minutes of the Board of Supervisors meeting held on October 5, 2022, as presented, for K-Bar Ranch Community Development District.

FOURTH ORDER OF BUSINESS

**Consideration of the Yellowstone
Tree Removal Quote Along Wild
Tamarind Near Stone Creek**

Mr. Josh Oliva presented the Yellowstone Tree Removal Quote Along Wild Tamarind Near Stone Creek for the Board of Supervisors.

On a motion by Ms. Vicki Shuster and seconded by Dr. Christiane Rinck, with all in favor, the Board of Supervisors approved the Yellowstone Tree Removal Quote Along Wild Tamarind Near Stone Creek (\$2,389.00), as presented, for K-Bar Ranch Community Development District.

FIFTH ORDER OF BUSINESS

Staff Reports

A. District Chair Report

Ms. Vicki Shuster updated those in attendance on various projects and issues the District is handling. Ms. Vicki Shuster presented the FL Play Structures and Water Features, Inc. Quote (\$2,000.00) for the Pool Resurface Project for Inspections and Oversight as the Project Manager.

On a motion requested by Ms. Vicki Shuster and seconded by Ms. Cynthia Gustavel, with all in favor, the Board of Supervisors approved the FL Play Structures and Water Features, Inc. Quote (\$2,000.00) for the Pool Resurface Project for Inspections and Oversight as the Project Manager, as presented, for K-Bar Ranch Community Development District.

B. District Counsel Report

Ms. Vivek Babbar discussed the License Agreement from M/I Homes to install landscaping on Community Development District property.

C. District Engineer

Ms. Tonja Stewart updated the Board of Supervisors on obtaining a future quote for the culvert pipe in Laurel Vista.

D. District Manager Report

Mr. Lynn Hayes reviewed his report and informed the Board the next meeting would be on December 7, 2022 at 6:00 p.m. at the K-Bar Ranch II Amenities Center located at 10820 Mistflower Lane, Tampa, FL 33647.

Mr. Lynn Hayes informed the Board of Supervisors the candidates that prevailed in the General Election will take the Oath of Office at the December 7, 2022 meeting.

SIXTH ORDER OF BUSINESS

**Presentation of Landscape Specialist
Inspection Report and Landscaper
Comments**

Mr. Lynn Hayes presented the Landscape Specialist Inspection Report. Mr. Josh Oliva presented his report.

SEVENTH ORDER OF BUSINESS

Presentation of Aquatics Report

Mr. Virgil Stolz presented his report.

EIGHTH ORDER OF BUSINESS

**Consideration of the Yellowstone 2022
Quote for Community Mulch**

On a motion requested by Ms. Cynthia Gustavel and seconded by Mr. Edmund Radigan, with all in favor, the Board of Supervisors approved the Yellowstone 2022 Quote (\$10,465.00) for Community Mulch, as presented, for K-Bar Ranch Community Development District.

NINTH ORDER OF BUSINESS

Supervisor Requests

TENTH ORDER OF BUSINESS

Adjournment

Mr. Lynn Hayes stated that if there was no further business to come before the Board then a motion to adjourn would be in order.

On a Motion by Mr. Edmund Radigan and seconded by Ms. Cynthia Gustavel, with all in favor, the Board of Supervisors adjourned the meeting at 7:35 p.m. for K-Bar Ranch Community Development District.

Secretary / Assistant Secretary

Chairperson / Vice Chairperson363

Tab 4

K-BAR RANCH COMMUNITY DEVELOPMENT DISTRICT

District Office · Wesley Chapel, Florida · (813) 994-1001

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

www.kbarcdd.org

Operation and Maintenance Expenditures September 2022 For Board Approval

Attached please find the check register listing the Operation and Maintenance expenditures paid from September 1, 2022 through September 30, 2022. This does not include expenditures previously approved by the Board.

The total items being presented: **\$69,064.74**

Approval of Expenditures:

____ Chairperson

____ Vice Chairperson

____ Assistant Secretary

K-Bar Ranch Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2022 Through September 30, 2022

Vendor Name	Check #	Invoice Number	Invoice Description	Invoice Amount
Blue Water Aquatics, Inc.	100047	29168	Midge Fly Control - Pond #702 09/22	\$ 615.00
Christiane Rinck	100039	CR090722	Board of Supervisors Meeting 09/07/22	\$ 200.00
City of Tampa	100048	1014539	Alarm Code Violation 07/22 & 08/22	\$ 560.00
City of Tampa Utilities	100040	2133060 07/22	10511 Wild Tamarind Dr 07/22	\$ 696.38
City of Tampa Utilities	100040	2163299 08/22	19349 Water Maple Dr 08/22	\$ 11.00
City of Tampa Utilities	100052	2133060 08/22	10511 Wild Tamarind Dr 08/22	\$ 160.47
Cynthia Gustavel	100041	CG090722	Board of Supervisors Meeting 09/07/22	\$ 200.00
Edmund P Radigan	100042	ER090722	Board of Supervisors Meeting 09/07/22	\$ 200.00
Egis Insurance Advisors, LLC	100033	16543	General Liability/Prop/POL Insurance FY 10/01/22-10/01/23	\$ 10,525.00
Florida Courts, Inc.	100034	4290	Balance Due - Resurface Tennis Courts 09/22	\$ 5,300.00
John C. Bowersox	100043	JB090722	Board of Supervisors Meeting 09/07/22	\$ 200.00

K-Bar Ranch Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2022 Through September 30, 2022

Vendor Name	Check #	Invoice Number	Invoice Description	Invoice Amount
K-Bar Ranch II CDD	100053	80322	Board of Supervisors Meeting Room Rental 08/03/22	\$ 100.00
K-Bar Ranch II CDD	100053	OMR0822-1	Landscape Cost Share 08/22	\$ 3,500.00
Nvirotect Pest Control Service, Inc.	100049	273950	Pest Control Account #9822 09/22	\$ 65.00
Poop 911	100035	5951282	10 Stations Filled/Emptied 08/22	\$ 237.90
Republic Services	100030	0696-001050168	Disposal Service 09/22	\$ 160.63
Rizzetta & Company, Inc.	100029	INV0000071165	Management Services 09/22	\$ 4,368.34
Rizzetta & Company, Inc.	100036	INV0000071203	General Management & Oversight/Personnel 09/22	\$ 1,724.69
Rizzetta & Company, Inc.	100044	INV0000071226	Out of Pocket Expense 08/22	\$ 68.60
Rizzetta & Company, Inc.	100050	INV0000071522	Personnel Reimbursement 09/16/22	\$ 913.02
Spectrum	ACH	046393801091522	10511 Wild Tamarind Dr 09/22	\$ 237.97
Straley Robin Vericker	100045	22027	Legal Services 08/22	\$ 1,549.00

K-Bar Ranch Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2022 Through September 30, 2022

Vendor Name	Check #	Invoice Number	Invoice Description	Invoice Amount
TECO	ACH	211025675680 9/22	19238 Climbing Aster DR 09/22	\$ 79.21
TECO	ACH	221008243992 9/22	Kbar Ranch Pkwy - Streetlights 09/22	\$ 939.57
TECO	ACH	Electric Summary 08/22	Electric Summary 08/22	\$ 15,712.59
Times Publishing Company	100037	0000243745 08/31/22	Legal Advertising 08/22	\$ 497.00
United Building Maintenance, Inc.	100031	376	Pool Cabana/Restroom Maintenance 09/22	\$ 600.00
United Building Maintenance, Inc.	100031	377	Janitorial Supplies 09/22	\$ 11.01
Victoria Shuster	100046	VS090722	Board of Supervisors Meeting 09/07/22	\$ 200.00
Yellowstone Landscape	100032	TM 419025	Conservation Cutback 08/22	\$ 3,835.72

K-Bar Ranch Community Development District

Paid Operation & Maintenance Expenditures

September 1, 2022 Through September 30, 2022

<u>Vendor Name</u>	<u>Check #</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
Yellowstone Landscape	100038	TM 419026	Cutback - Whispering Brook 08/22	\$ 2,602.81
Yellowstone Landscape	100051	TM 429049	Install Summer Annuals 09/22	\$ 1,333.99
Yellowstone Landscape	100051	TM 429366	Monthly Landscape Maintenance 09/22	\$ 11,659.84
Report Total				<u>\$ 69,064.74</u>

Tab 5

K BAR RANCH

LANDSCAPE INSPECTION REPORT



November 18, 2022
Rizzetta & Company
Jason Liggett – Landscape Specialist



Rizzetta & Company
Professionals in Community Management

SUMMARY & K-Bar Ranch

General Updates, Recent & Upcoming Maintenance

- ❖ We are now in Bi Weekly Mowing in the district.
- ❖ Next Inspection is 12-12-2022 at 9:00 am. Inspection dates are depending on weather or other items that might come up during the calendar month.

The following are action items for Yellowstone to complete. Please refer to the item # in your response listing action already taken or anticipated time of completion. **Red text** indicates deficient from previous report. **Bold Red text** indicates deficient for more than a month. **Green text** indicates a proposal has been requested. **Blue** indicates irrigation.

1. Remove the taller weeds growing in the Dwarf Bottle Brush in the center island on Wild Tamarind by hand.
2. Treat the Ant mounds throughout Wild Tamarind and once eradicated rake down the mounds. Provide the district with the option of Top Choice from the scope of services.
3. Remove the vines from the base of the Schilling Hollies at the corner of Wild Tamarind and Bassett Creek Drive.
4. Treat the Fakahathcee grass on Bassett Creek Drive for spider mites once eradicated perform a cutback on the material.
5. Treat the brown patch throughout the main entrance to the community on Bassett Creek Drive.(Pic 5)
6. During my inspection I noticed the Sabal Palms at the entrance to the community have not been trimmed but the ones around the pool were completed. When will these be completed?
7. Yellowstone to make sure that we are going down the hill on the inbound side of Wild Tamarind drive past the area where we installed the Fountain grass.(Pic 7,7a Next Page)
8. Remove the vines from the black railing fence in the cull d sac on Sweet Clover Lane.
9. Throughout all district common areas to include lakes we need to treat the ant mounds and once eradicated rake down the mounds.



K-Bar Ranch



14. Throughout Heron Preserve as discussed with Yellowstone using mowers and string trimmers make sure we are getting CDD grass areas back next to the ponds and the common area spaces. We need to push mower decks as far as we can to make sure these areas get mowed.

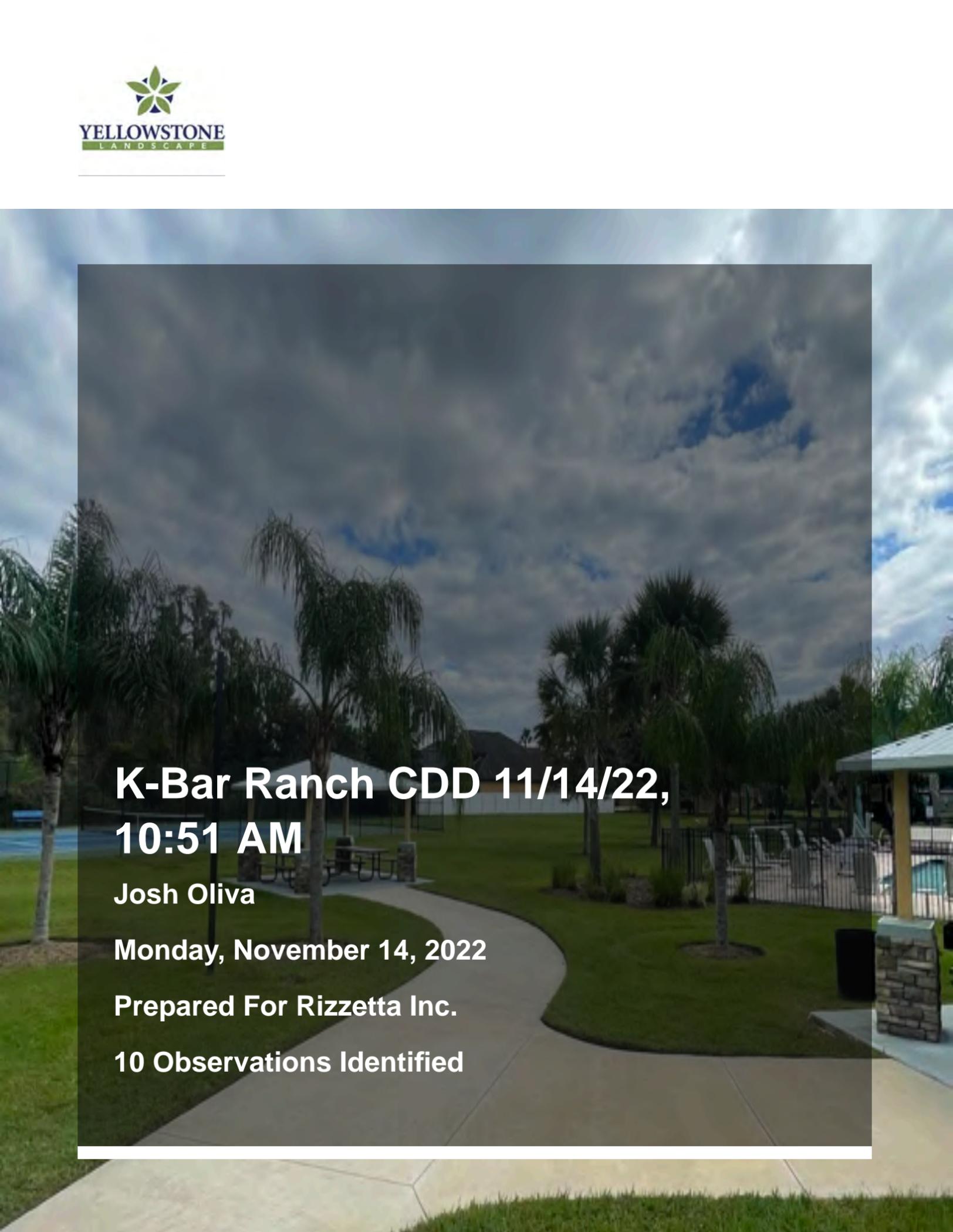
10. Treat the turf weeds in the Saint Augustine on the inbound side of Wild Tamarind from the clubhouse until Kbar Ranch Parkway in the district turf areas.

11. Treat the ant mounds inside of Laurel Vista on Clover Pine Drive.

12. We are still not doing a very good job of keeping the newly installed plant material on Clover Pine Drive weed free and Soft Edged.(Pic 12)

13. During the winter months the crews need to work on taking back over CDD turf areas that were saturated and or inaccessible this includes around pond banks and common areas.





**K-Bar Ranch CDD 11/14/22,
10:51 AM**

Josh Oliva

Monday, November 14, 2022

Prepared For Rizzetta Inc.

10 Observations Identified



Heron Preserve Cut Back Area

YL Crew

Cut back grass line 5 feet or so to edge of wetland area



Pond Cutback

YL Crew

Continue cutting back all pond areas that but up to conservation areas.



Continue To Remove Vines

Property Manager

Continue to remove vines on all hedges including here row at corner of Wild Tamarind and Basset Creek Dr.



Maintenance

YL Crew

Overall services are being completed throughout.



Palm Trimmings Are Being Completed
All Palms will be trimmed in months of December.

Pool area palms completed mid November



Ornamental Cutbacks
Ornamental cutbacks will be completed in November.



Oak Suckers

YL Crew

Remove all oak suckers and new growth with services



Mowing Services

Mowing services are being completed

Cedar Cutbacks At Stonecreek And Wild Tamarind

Property Manager

Leaning Tree removals completed on 11/18/22



Josh Oliva
Yellowstone

Crape Myrtle

Property Manager

Crape Myrtle at corner of basset creek and wild tamarind major cutback not by Yellowstone. Will monitor recovery.

Tab 6

BLUE WATER AQUATICS

SERVICE REPORT

DATE: 11/17/22

CUSTOMER: K-BAR RANCH CDD-I

AQUATECH: C. THOMPSON

ACCOUNT # _____ WORK ORDER # _____

BIOBLOCKS

SITE	INSPECTION	TREATMENT	AIRBOAT	JONBOAT	AQUA-MULE	ATV	BACKPACK	ALGAE	GRASSES	CATTAILS	SUBMERSED	FLOATING	BRUSH	D/OXYGEN	WATER LEVEL	RESTRICTION # DAYS	WEATHER CONDITIONS
A	✓	✓															65°, overcast
101	✓	✓															
601	✓	✓															

OBSERVATIONS / RECOMMENDATIONS 601 HAD SOME ALGAE, 101 & A WERE FREE OF ALGAE. COLLECTED WATER SAMPLES AND DEPLOYED NEW BLOCKS.

BLUE WATER AQUATICS

Aquatic & Environmental Services

5119 STATE ROAD 54
NEW PORT RICHEY, FL 34652
(727) 842-2100

WWW.BLUEWATERAQUATICSINC.COM

- Algae & Aquatic Weed Control Programs
- Water Quality Testing
- Wetland Creation, Restoration & Management
- Lake Aeration Systems
- Mechanical Weed Removal / Marsh Master
- Noxious Tree & Brush Control
- Mitigation Services

LAKE MANAGEMENT • AQUATIC SERVICES • ENVIRONMENTAL PLANNING

CUSTOMER

BLUE WATER AQUATICS

SERVICE REPORT

DATE: 11/17/22

CUSTOMER: K-BAR RANCH CDD-I

AQUATECH: C. THOMPSON

ACCOUNT # _____ WORK ORDER # _____

EUTROSORB

SITE	INSPECTION	TREATMENT	AIRBOAT	JONBOAT	AQUA-MULE	ATV	BACKPACK	ALGAE	GRASSES	CATTAILS	SUBMERSED	FLOATING	BRUSH	D/OXYGEN	WATER LEVEL	RESTRICTION # DAYS	WEATHER CONDITIONS
702	✓	✓		✓													65° overcast
200L	✓	✓		✓													
200	✓	✓		✓													

OBSERVATIONS / RECOMMENDATIONS NO ALGAE ON 702 + 200. VERY SMALL AMOUNT OF ALGAE ON 200L. WATER SAMPLES COLLECTED. ALL PONDS TREATED WITH EUTROSORB.

BLUE WATER AQUATICS

Aquatic & Environmental Services

5119 STATE ROAD 54
NEW PORT RICHEY, FL 34652
(727) 842-2100

WWW.BLUEWATERAQUATICSINC.COM

- Algae & Aquatic Weed Control Programs
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- Lake Aeration Systems
- Mechanical Weed Removal / Marsh Master
- Noxious Tree & Brush Control
- Mitigation Services

LAKE MANAGEMENT • AQUATIC SERVICES • ENVIRONMENTAL PLANNING

CUSTOMER

BLUE WATER AQUATICS

SERVICE REPORT

DATE: 11/18/22

CUSTOMER: K-BAR RANCH CDD-I

AQUATECH: C. THOMPSON

ACCOUNT # _____ WORK ORDER # _____

MIDGES																WEATHER	
SITE	INSPECTION	TREATMENT	AIRBOAT	JONBOAT	AQUA-MULE	ATV	BACKPACK	ALGAE	GRASSES	CATTAILS	SUBMERSED	FLOATING	BRUSH	D/OXYGEN	WATER LEVEL	RESTRICTION	CONDITIONS
702	✓	✓		✓													62°, overcast

OBSERVATIONS / RECOMMENDATIONS NO MIDGES OBSERVED, NO LARVAE IN WATER. SOME FUNGUS GNATS OBSERVED ON BANK TOPS. FUNGUS GNATS WILL DIMINISH WITH TODAY'S TREATMENT. TREATED WITH TALSTAR P AND NYGUARD(IGR).

BLUE WATER AQUATICS

Aquatic & Environmental Services

5119 STATE ROAD 54
NEW PORT RICHEY, FL 34652
(727) 842-2100

WWW.BLUEWATERAQUATICSINC.COM

- Algae & Aquatic Weed Control Programs
- Water Quality Testing
- Wetland Creation, Restoration & Management
- Lake Aeration Systems
- Mechanical Weed Removal / Marsh Master
- Noxious Tree & Brush Control
- Mitigation Services

LAKE MANAGEMENT • AQUATIC SERVICES • ENVIRONMENTAL PLANNING

CUSTOMER

Tab 7



K-Bar Ranch CDD
Exhibit A
Landscape Management Service Pricing Sheet
Landscape Maintenance Responsibility Transfer
As Shown On District Maintenance Map

Core Maintenance Services

Mowing, Detailing & Clean Up

*Includes mowing, edging, string-trimming, trim shrubs,
pick up trash, weed removal, clean-up, ect.*

IPM - Fertilization & Pest Control

Fertilization/Fungicide/Insecticide/herbicide/weed control

Irrigation Inspections

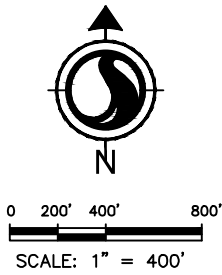
Includes monthly inspections with reports

Grand Total Annual	\$42,000.00
Monthly	\$3,500.00

EXCELLENCE IN COMMERCIAL LANDSCAPING

V:\215600266\215600266_Land_Development\Drawings\Exhibits\215600266-X06-Maintenance Map.dwg
2020/10/07 12:23 PM 01/1/2025 1:00:00

Exhibit A



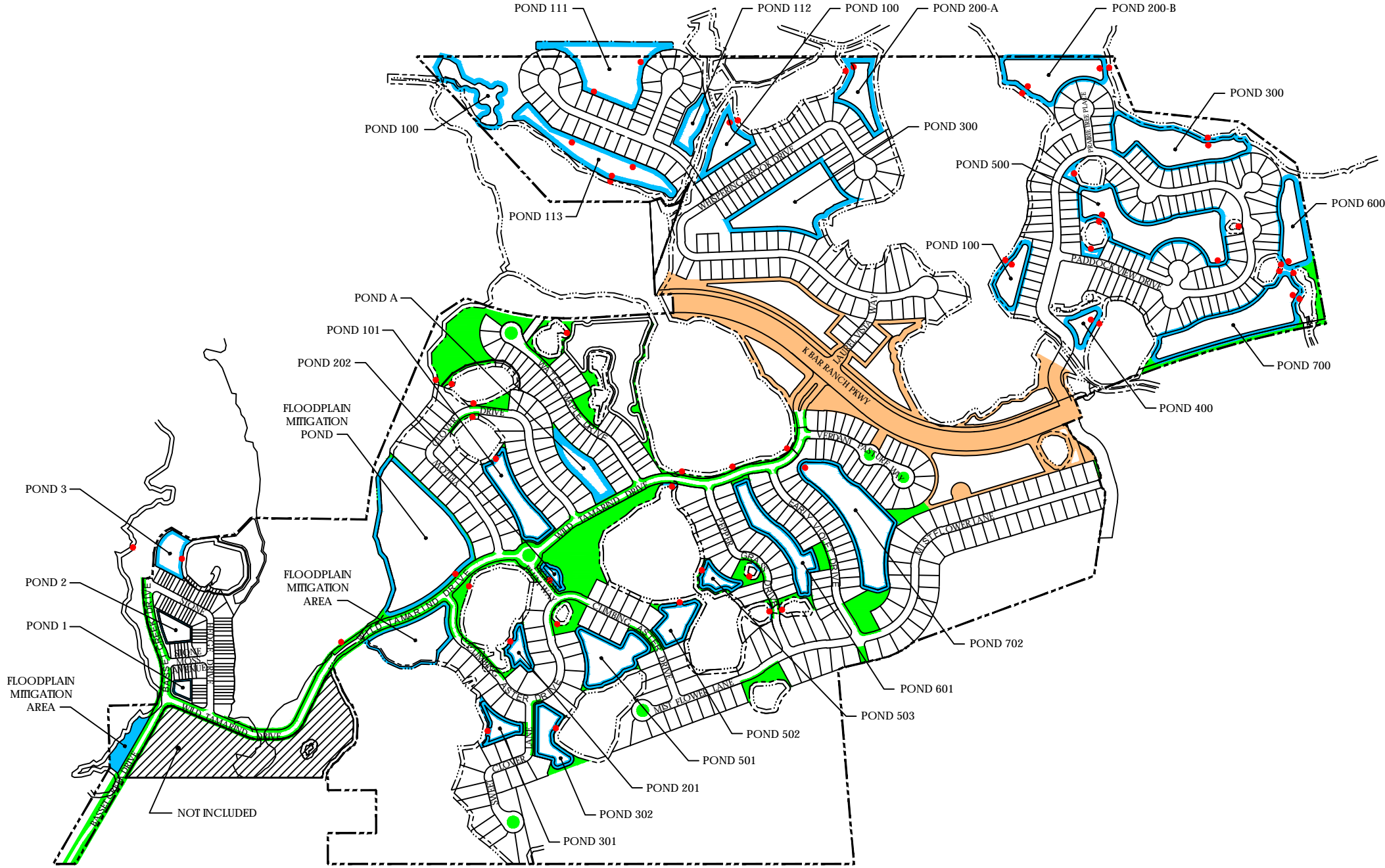


Stantec

Stantec Consulting Services Inc.
777 S. Harbour Island Blvd., Suite 600
Tampa, Florida 33602 Tel. 813.223.9500
www.stantec.com Fax. 813.223.0009
Certificate of Authorization #27013
Fl Lic. # LC-C000170

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- Legend
- CDD BOUNDARY
 - DRAINAGE STRUCTURES TO BE MAINTAINED
 - K-BAR RANCH CDD LANDSCAPE MAINTENANCE
 - K-BAR RANCH CDD LANDSCAPE MAINTENANCE RESPONSIBILITY TRANSFERRED TO K-BAR RANCH II
 - POND BANK MAINTENANCE



Revised per agreement with K-Bar Ranch II CDD for			
landscape maintenance and proportionate share payment	VN	TLS	20.10.07
Revision	By	Appd.	YY.MM.DD
Issued	By	Appd.	YY.MM.DD
File Name: 215600266-X06-MAINTENANCE MAP	VN	TLS	VN
	Dwn.	Chkd.	Desgn.
			YY.MM.DD

Permit-Seal

Client/Project

K-BAR RANCH
COMMUNITY DEVELOPMENT DISTRICT

Tampa, Florida

Title

MAINTENANCE MAP

Project No.	Scale	
215600266	1" = 400'	
Drawing No.	Sheet	Revision
X06	1 of 1	0

Tab 8



Proposal #256857

Date: 11/28/2022

From: Joshua Oliva

Proposal For

K-Bar Ranch I CDD

3434 Coldwell Ave. Suite 200
Tampa, FL 33614

main:
mobile:
lhayes@rizzetta.com

Location

10511 Wild Tamarind DR
Tampa, FL 33647

Property Name: K-Bar Ranch I CDD

Verdant Pasture Palm Removal

Terms: Net 30

Price to remove declined Palm at stand-alone island on Verdant Pasture.

Stump Grinding included as board is discussing replacement of the palm.

Palm Replacement is not recommended for small bed surrounded by so much concrete.

When concrete is placed over the roots, the digging required to create the patio or concrete space damages critical root structures. Covering this zone with concrete inhibits the tree's ability take in water and oxygen. As a result, laying concrete under an existing tree may result in the tree's death.

All cuts will be made to ANSI A300 specifications and in compliance to industry standards.

All Permits and Certified Arborist assessments are included

All removals are contingent on permit approvals

DESCRIPTION	QUANTITY	UNIT PRICE	AMOUNT
Arbor Cost	1.00	\$753.45	\$753.45

Client Notes

Signature

x

SUBTOTAL	\$753.45
SALES TAX	\$0.00
TOTAL	\$753.45

Signature above authorizes Yellowstone Landscape to perform work as described above and verifies that the prices and specifications are hereby accepted. All overdue balances will be charge a 1.5% a month, 18% annual percentage rate.

Limited Warranty: All plant material is under a limited warranty for one year. Transplanted plant material and/or plant material that dies due to conditions out of Yellowstone Landscape's control (i.e. Acts of God, vandalism, inadequate irrigation due to water restrictions, etc.) shall not be included in the warranty.

Contact

Print Name: _____

Title: _____

Date: _____

Assigned To

Joshua Oliva
Office:
joliva@yellowstonelandscape.com



Proposal #265168

Date: 11/29/2022

From: Joshua Oliva

Proposal For

K-Bar Ranch I CDD

c/o Rizzetta & Company, Inc.
3434 Coldwell Ave. Suite 200 Tampa, FL
33614

main:
mobile:

Location

10511 Wild Tamarind DR
Tampa, FL 33647

Property Name: K-Bar Ranch I CDD

Verdant Pasture Palm Replacement

Terms: Net 30

- Price to install Queen Emma, Crinum Lily, in place of the declined Sylvester tree that is being removed. Crinum Lily's are very drought tolerant.
- Price also includes labor of Yellowstone worker to go out 3 times a week for 1 month to help ensure establishment.
- Being that this is an unirrigated bed Yellowstone would not be responsible for replacing the plant under warranty if it did not survive.

DESCRIPTION	QUANTITY	UNIT PRICE	AMOUNT
General Labor	1.00	\$857.13	\$857.13
Crinum Lily, Queen Emma 15Gal	1.00	\$200.00	\$200.00
Cocoa Brown Mulch	5.00	\$11.40	\$57.00

Client Notes



Signature

x

SUBTOTAL	\$1,114.13
----------	------------

SALES TAX	\$0.00
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TOTAL	\$1,114.13
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Signature above authorizes Yellowstone Landscape to perform work as described above and verifies that the prices and specifications are hereby accepted. All overdue balances will be charge a 1.5% a month, 18% annual percentage rate.
Limited Warranty: All plant material is under a limited warranty for one year. Transplanted plant material and/or plant material that dies due to conditions out of Yellowstone Landscape's control (i.e. Acts of God, vandalism, inadequate irrigation due to water restrictions, etc.) shall not be included in the warranty.

Contact

Print Name: _____

Title: _____

Date: _____

Assigned To

Joshua Oliva
Office:
joliva@yellowstonelandscape.com

Tab 9



State of Florida Pool Contractor, License # CPC1457968

Custom Proposal Prepared For

K-Bar Ranch CDD Pool and Tile Renovation

By
Brian Wildridge
The Pool Works of Florida
November 15, 2022



Commercial Pool Construction, Renovation & Innovation

The Pool Works of Florida, Inc.
9191 130th Avenue North | Largo, FL 33773
Phone 727.938.8389 | Fax 727.938.5594 | www.thepoolworks.com



State of Florida Pool Contractor, License # CPC1457968

Company Profile

The Pool Works is a fully licensed and insured specializing in commercial pool construction, renovation and innovation. We've been in business since 1996. Donald Ball Sr., President & CEO is the State of Florida License holder for the company and has been in the industry since 1986. Our Company has a commitment to quality with every project and we are extremely proud of our reputation. A list of completed projects has been included with your proposal for your review. There are a number of quality companies in our area that we enjoy competing with every day. Unfortunately, there are an equal number of undesirable companies as well.

The Pool Works is one of the industry's finest pool renovation specialists. We continue to be recognized for our quality craftsmanship and design specialties. Customers choose us when they want a partner that offers excellence in quality workmanship, utilizing the best materials available. Our team is staffed with the top consultative experts, tradesmen and support staff, ensuring that your project is safe and professional from start to finish.



Construction | Renovation | Repairs & Service | Pool Furniture

The following resources are available to verify licensing and business practices.

Better Business Bureau



www.bbbwestflorida.org
727-535-5522

Pinellas County Construction Licensing Board



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State of Florida Pool Contractor, License # CPC1457968

www.pcclb.com

727-536-4720

PUBLIC SWIMMING POOL RESURFACING CODE REQUIRMENT EXPLANATION

The following survey details the changes that are required for the pool to meet current code. These changes are required when the pool is renovated. This survey is a tool to inform the property owners of the requirements. The Health Dept. will perform an inspection after the work is completed to assure the property owner that current code requirements have been met.

This is very important to ensure the proposal is accurate and prevent expensive change orders later. It is unlawful for a company to begin construction or modification to any public pool without first having received written approval from the Health Dept.

The necessary corrections are as follows:

The existing step tile does not meet code. They must be replaced with a permanent, continuous, dark color tile to highlight the step area. The tiles must also be NON-SKID.

The existing depth marker tiles in the pool will be replaced

International "No Diving" tiles are required by code to be placed on the top of the coping or the deck next to the pool.

A new VGB compliant main drain frame and grate will be installed.



State of Florida Pool Contractor, License # CPC1457968

POOL RESURFACING PROPOSAL

Submitted To: K-Bar Ranch CDD

Date: November 15, 2022

Work to be performed at: 10511 Wild Tamarind Dr. Tampa FL 33647

Point of Contact: Tanja Stewart 813-426-4916 / Tanja.stewart@stantec.com

Pool Size:	Length 50'	Perimeter 137 '	Total Square Footage - 1550
	Width 20'	Depth 3' to 5'	

We hereby submit specifications and estimates for renovations of a swimming pool. We agree to furnish materials and labor to complete renovation. All work to be completed in compliance with attached specifications.

Perform 24 hour Static Water Test to verify Water Loss			INCLUDED
Refinish pool interior with HYDRAZZO			\$ 13,620.00
Install upper tile	137	Lin. Ft.	\$ 3,425.00
Install NON SKID step tile as per code	30	Lin. Ft.	\$ 800.00
Install VGB Compliant main drain frame and grate as per code	Qty 1		\$ 150.00
Install Depth Markers as per code	Qty. tiles	12	\$ 300.00
Install International "No Diving" tiles as per code	Qty. tiles	6	\$ 180.00
Repair cracks using the Torque Lock System		Lin. Ft.	\$ TBD
Chemical start-up and water balance			\$ 775.00
Permit Fees			\$ 600.00

Note: After the pool is drained it will be inspected for cracks and if cracks are found, management will be notified. The above cost for crack repair may increase at a cost of \$100.00 per linear foot.

POOL RESURFACING JOB TOTAL \$ 19,850.00

The Pool Works of Florida, Inc.
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Phone 727.938.8389 | Fax 727.938.5594 | www.thepoolworks.com



State of Florida Pool Contractor, License # CPC1457968

ACCEPTANCE OF CONTRACT TERMS AND CONDITIONS

Submitted To: K-Bar Ranch CDD
10511 Wild Tamarind Dr. Tampa FL 33647

Date: November 15, 2022

1. Payment schedule as follows:

30% due 60 days prior to commencement.	\$ 5,955.00
50% due upon tile delivery to site.	\$ 9,925.00
20% due within 7 days of completion	\$ 3,970.00

2. Balance to be paid in full upon satisfactory completion of work.

3. Unpaid balance will incur service charges to the maximum extent allowable by law, as well as, any cost (s) of collections and attorney fees. Any and all disputes that arise during or after execution of this contract will be settled solely by the FSPA binding arbitration process.

Failure to make timely progress payments could result in delays of the project.

4. Any alterations or deviation from the enclosed specifications involving extra costs will only be executed upon written order and will become an extra charge over and above this contract.

5. The Pool Works includes removing loose plaster and patching as part of its contract however, in the event of severe loose plaster The Pool works will accept the cost of removing and replacing up to 1% of the total square footage of the pool. Any more than 1% of the square footage will be removed and replaced at a rate of up to \$3.00 per square foot and will be added to the price of the contract. Other structural problems such as cracks in the pool shell or unstable substrate may also require additional work and cost. This is an unforeseen problem. The Pool Works will make the customer aware of the problem as soon as the pool is drained and inspected.

6. PRICING GOOD FOR 30 DAYS UNLESS SIGNED AND ACCEPTED.

7. Projects won't begin without a deposit received 60 days prior to the start date.

8. ***Material Selections will need to be made in our Largo Showroom as quickly as possible after the proposal has been signed.***

All work to be in compliance with the Florida Building Code and the County Health Department.

ACCEPTANCE

The prices, specification, terms and conditions contained in this bid package are hereby accepted. We authorize the renovation project to be done.

Signature _____ Date _____

NOTE: The pricing for this proposal may increase due to the ongoing cost increases for materials.

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State of Florida Pool Contractor, License # CPC1457968



LED LIGHT PROPOSAL

Submitted To: K-Bar Ranch CDD

Date: November 15, 2022

Work to be performed at: 10511 Wild Tamarind Dr. Tampa FL 33647

Point of Contact: Tanja Stewart 813-426-4916 / Tanja.stewart@stantec.com

We hereby submit specifications and estimate for replacing pool lights. We agree to furnish materials and labor to complete renovation. All work to be completed in compliance with attached specifications.

Install (2) Pentair Intellibrite G5 LED Pool Lights/Assemblies



PENTAIR

THE MOST ENERGY-EFFICIENT LED POOL LIGHTING AVAILABLE

- The brightest and most energy-efficient white LED pool light on the market
- Energy efficient, utilizing up to 89% less energy than comparable incandescent lights

The IntelliBrite 5G white lights combine unmatched energy efficiency with superior light intensity and distribution. The exclusive design can be adjusted to create a standard, wider beam or a narrower pattern, depending on your pool's needs.



ENERGY EFFICIENCY:

- Pentair LED pool lights have a 2 year complete replacement warranty on the entire light.
- LED lights provide the equivalent of a 300 watt bulb (same as current lights in pool) while only consuming 45 watts of power. The LED lights are brighter and whiter.
- The (2) existing lights cost \$23.25 per month to operate (8) hours a night.
- LED lights will cost \$3.10 per month to run (8) hours a night.
- To replace lights with same type will cost \$725.00 and there is no warranty on the bulb and the fixture has a one year warranty.
- By choosing the LED lights you will save \$20.15 each month and will recoup the expense.
- The led bulbs themselves will last up to 10 years creating more savings by not having to replace bulbs.

TOTAL \$1,700.00

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State of Florida Pool Contractor, License # CPC1457968

ACCEPTANCE OF CONTRACT TERMS AND CONDITIONS

Submitted To: K-Bar Ranch CDD

Date: November 15, 2022

We hereby submit specifications and estimate for replacing pool lights. We agree to furnish materials and labor to complete renovation. All work to be completed in compliance with attached specifications.

1. Payment schedule as follows:

50% due 60 days prior to commencement	\$ 850.00
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50% due within 7 days of completion	\$ 850.00
-------------------------------------	-----------

2. Balance to be paid in full upon satisfactory completion of work.

3. Unpaid balance will incur service charges to the maximum extent allowable by law, as well as, any cost (s) of collections and attorney fees. Any and all disputes that arise during or after execution of this contract will be settled solely by the FSPA binding arbitration process. Failure to make timely progress payments could result in delays of the project.

4. Any alterations or deviation from the enclosed specifications involving extra costs will only be executed upon written order and will become an extra charge over and above this contract.

5. PRICING GOOD FOR 30 DAYS UNLESS SIGNED AND ACCEPTED.

6. Projects won't begin without a deposit received 60 days prior to the start date.

All work to be in compliance with the Florida Building Code and the County Health Department.

ACCEPTANCE

The prices, specification, terms and conditions contained in this bid package are hereby accepted. We authorize the renovation project to be done.

Signature _____ Date _____

NOTE: The pricing for this proposal may increase due to the ongoing cost increases for materials.

The Pool Works of Florida, Inc.
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Phone 727.938.8389 | Fax 727.938.5594 | www.thepoolworks.com



State of Florida Pool Contractor, License # CPC1457968

Construction Specifications for Commercial Pool Resurfacing

JOBSITE

- Will remain as clean as possible during construction
- Will remain locked and secured at all times with no access to area while under construction
- Caution tape and signs will be posted at gates or points of entry
- Safety of workers and people close to the work area will remain the highest concern
- Inspections of any work should be done with the job supervisor present

MATERIALS

- Materials may be stored on jobsite in a neat and orderly manner
- All materials will be used in strict accordance with manufacturer specifications

PREPARATION

- All pool equipment, pool lights will be turned off
- Pool will site for 24 hour Static Water Test
- Pool will be drained with submersible pumps to storm drains or other specified area
- The hydrostatic plug will be removed and precautions taken to control ground water
- Temporary pumps may be installed to control ground water
- Pool surface will be checked for stability and sounded for any loose or delaminated pool finish
- All returns will be cut back or replaced if necessary to allow for new pool finish and to ensure a new seal around them
- Install new floor inlets with diffusers and cover plates to diffuse return water into water column. Minimizes staining on pool surface
- If no new tile is being set, existing tile will be undercut for proper seal of the pool finish
- Pool light fixtures will be removed and niches internally inspected for proper sealing
- Light niches will be cut back for proper seal
- Main drain "Pot" will also be inspected for proper sealing around pipe (s)
- Ladders and grab rails will be removed if possible and anchors inspected
- Step tiles will be replaced
- Skimmers will be cut back for proper seal, if applicable
- Gutter grates and frames will be removed and replaced with new frames
- Pipes in gutter fittings will be raised if necessary and sealed
- Entire pool finish will be acid etched with hydrochloric acid
- The acid will also etch marcite to open pores and remove impurities.
- Pool surface may be bleach washed and degreased with tri-sodium phosphate if necessary
- Pool surface will be pressure washed at 3500 psi



State of Florida Pool Contractor, License # CPC1457968

(Continued) Construction Specifications

INSTALLATION

- Pool surface will be bond coated with an SGM Bondcoat
- New pool surface will be applied at a minimum of 3/8" to 1/2" thickness
- Minimal accelerants will be used
- Pool surface will be mixed according to manufacturer directions
- Pool surface will be troweled into any voids created by cutback and packed to make seal
- Pool surface will be worked to a smooth finish
- Pool surface to be pneumatically applied
- A new VGB compliant main drain frame and grate will be installed
- Pool finish in gutters will be level and flush with grates
- Hydrazzo will be exposed and polished with a diamond pad.
- After installation is complete pool fill will start

TILE

- Existing tile will be removed if necessary or tile will be deglazed and cleaned for acceptance of new tile
- Tile on lip of gutter will be set to relevel pool according to the Florida Building Code requirements
- Tile will be set with polymer-modified thinset approved for underwater applications
- Tile will be grouted with polymer-modified grout approved for pool tile
- All pool tiles will be pool grade
- Code required depth markers would be set in tile line
- Tile at gutters will be set for a 2" drop from front to back of gutters

PERFORM POOL SURFACE START-UP (Per Manufacturer Start-up procedure)

- Pool equipment will be restarted
- The addition of a metal sequestrant will be added to pool
- Pool water chemistry will be completely balanced including Chlorine, PH, Total Alkalinity, Calcium Hardness and Cyanuric Acid

STRUCTURAL PROBLEMS AFTER DRAIN

Structural problems such as cracks in the pool shell or unstable substrate may require additional work and cost. This is an unforeseen problem. The Pool Works will make the customer aware of the problem and additional costs as soon as the pool has been drained and inspected.



State of Florida Pool Contractor, License # CPC1457968

Recent Resurface References

Bahia Del Mar I 6365 Bahia Del Mar Blvd Resource Property Management/Leah Tessler	St. Pete 727-864-0004	33715
Bahia Del Mar 5 6021 Bahia Del Mar Circle Resource Property Management/Tracy Sander	St. Pete 727-864-0004	33715
Bahia Del Mar 6 6350 Bahia Del Mar Circle Resource Property Management/Linda Kiser	St. Pete 727-864-0004	33715
Bahia Vista I 5801 Bahia Del Mar Circle Resource Property Management/Linda Kiser	St. Pete 727-864-0004	33715
Bay Island Ambassador Spa 7300 Sun Island Dr Property Manager/Joyce	S. Pasadena 727-360-2751	33707
Belle Biltmore Villas Oaks 150 Bellview Blvd Progressive Management	Belleair 727-773-9542	33756
Bonaventure Condo 3023 Bonaventure Cir Progressive Management/Simone	Palm Harbor 727-773-9542	34684
Casa Del Mar 5 6276 Sun Blvd. Resource Property Management/Vance Poland	St. Pete 727-864-0004	33715
Cedar Hollow Townhomes Cedar Hollow Lane Jim Nobles Management/Sharon Nichols	Tampa 727-441-14514	33618
Clearwater Yacht Club 803 Bayway Blvd Jack	Clearwater Beach 727-447-5135	33767
Coachman Creek 2625 SR 590 Clara Schultz, Manager	Clearwater 727-797-9701	33759
Country Club Condominium 1200 Country Club Dr. Community Management Concepts, Patricia England	Largo 727-364-4690	33771
Cypress Cove Townhomes 6249 W. Linebaugh Ave Management & Associates/ Joan Fissella	Tampa 813-433-2000	33625

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State of Florida Pool Contractor, License # CPC1457968

Recent Resurface References (Continued)

East Lake Woodlands Condo 5 101 Lakeview Place Rick/Maintenance	Oldsmar 727-773-6902	34667
Edgewater Arms Condo 622 Edgewater Dr Progressive Management/Bob	Dunedin 727-733-1896	34698
Forest Wood 8234 Long branch Drive Creative Property Management/ Marney	Port Richey 727-478-4917	34668
Franklin Square East 1480 Brier Ct Calibre Management/Ray	Palm Harbor 727-796-1996	34683
Glen Eagles Condominium 2600 Cypress Pond Road Citadel Property Management/Jim Ranalo	Palm Harbor 727-938-7730	34683
Glen Ellen MHP 2882 Gulf to Bay Blvd ELS Properties Mike Bowering	Clearwater 727-797-5432	33759
Golden Gate MHP Spa 8201 40 th Street North Robert	Pinellas Park 727-577-9205	33781
Heritage Isles Golf & Country Club 10630 Plantation Bay Dr. John Browne/Manager	Tampa 813-907-7388	33647
Highland Lakes HOA 3300 MacGregor Drive Carl/Maintenance Director	Palm Harbor 727-643-4125	34684
Hillcrest Mobile Home Park 2346 Druid Road Park Manager, Mike	Clearwater 727-535-7906	33764
Imperial Pines 3074 Eastland Blvd Progressive Management/Curt Young	Clearwater 727-773-9542	33756
Mariner Village 1531 Klosterman Road Progressive Property Management/Linda	Tarpon Springs 727-773-9542	34689
Palma Del Mar 2 6218 Palma Del Mar Blvd Qualified Property Management/Tracey	St. Petersburg 727-869-9700	33715



State of Florida Pool Contractor, License # CPC1457968

Recent Resurface References (Continued)

Palma Del Mar 3 6268 Palma Del Mar Blvd Tom Counihan/Board President	St. Petersburg 727-865-0192	33715
Palma Del Mar 4 6322 Palma Del Mar Blvd Del-Mar Property Services/Randy Miller	St. Petersburg 727-656-3791	33715
Palma Del Mar 5 6218 Palma Del Mar Blvd Qualified Property Management/Lydia Mascato	St. Petersburg 727-869-9700	33715
Penthouse Groves 1655 South Highland Ave Progressive Property Management/Tom Reardon	Clearwater 727-773-9542	33756
Philippe Bay Townhomes 2020 Philippe Parkway Resource Property Management/Mary Hadnott	Safety Harbor 727-796-5900	34695
Pine Ridge at Sugar Creek 13212 Slash Pine Dr Creative Management/Lisa Remick	Hudson 727-478-4909	34667
Quiet Waters 19931 Gulf Blvd. Minute Men Property Management/Bill Prout	Indian Shores 727-593-3265	33785
Ranchero Village 7100 Ulmerton Road Property Manager/Deborah	Largo 727-536-5573	33771
Royal Palms 400 Lake Ave Peter Sala/ Plant Operations Director	Largo 727-385-2997	33771
Sandal Cove 1001 Bayshore Blvd. Progressive Property Management/ Katherine Ganglhoff	Safety Harbor 727-773-9542	34695
Sarasota County Arlington Complex 2650 Waldemere St. Jose Duque, Pool Maintenance Supervisor	Sarasota 941-315-0155	34239
Sheraton Sand Key 1160 Gulf Blvd Seaway Resorts/John Agliano	Clearwater Beach 727-593-6000	33767
Shipwatch Yacht and Tennis Club CMC Property Management/Clara Carlucci	Largo 727-595-9300	33744



State of Florida Pool Contractor, License # CPC1457968

Recent Resurface References (Continued)

Shore Mariner 18304 Gulf Blvd Manager, Denny	Redington Shores 33708 727-393-8137
Surfside Condominium 11 Idlewild St Jim Nobles Management/Richard Drago	Clearwater Beach 33767 727-441-1454
Sunset Palms 3401 Gandy Blvd Manager, Richard Thomas	Pinellas Park 33781 727-577-0287
Tampa Bay Yacht and Tennis Club General Manager/Scott Fairbairn	Tampa 33611 813-831-8665 ext 225
Tarpon Shores MHP 40274 US Hwy 19 N Manager/ Michael Kostare	Tarpon Springs 34689 727-938-2600
The Childrens Home 10909 Memorial Hwy Charles	Tampa 33615 727-599-5439
Versant Place Apts 1010 Versant Drive Victoria/Manager	Tampa 33511 813-655-1957
Viewpoint on the Bay 55 Rogers Street Tom Vanhoose Board Member	Clearwater 33756 727-812-4317
Westlake Village HOA 810 Village Way Carl/Board Member	Palm Harbor 34683 727-643-4125
Windsor Club @ Legacy Park 9905 Windsor Club Drive Lacey Haker/Manager	Riverview 33578 813-246-4334



State of Florida Pool Contractor, License # CPC1457968



April 12, 2021

AQUAVATIONS



State of Florida Pool Contractor, License # CPC1457968

The Pool Works, Inc.
9101 130th Ave, FL 33773
Phone 727.938.1100 thepoolworks.com





State of Florida Pool Contractor, License # CPC1457968

Pool/Spa Finish Warranty



Aquavations Corporation provides a 10 Year Limited Warranty for Hydrazzo pool/spa finishes.

Aquavations Corp. is a worldwide leader in advanced, pre-blended exposed aggregate coating systems for the modern swimming pool. Our mission is to develop dependable, pre-blended pool plaster systems using basic and advanced technology from years of experience and hands-on applications. We have developed new and improved products, superior to any other, utilizing the earth's finest raw materials. A combined 40 years of work in the industry has produced pool surface technology unrivaled in appearance and durability.

This is exclusive for The Pool Works and its customers!



The Pool Works of Florida, have achieved a 22 Year Award for Craftsmanship and Loyal Dedication from Aquavations Corp. allowing us to offer the highest designation of the Hydrazzo Extended Warranty.

We provide an additional 10 Year Extended Limited Warranty, which warrants the same coverage as the initial 10 Year Limited Warranty.

Combined, this gives our customers a 20 Year Limited Warranty. If we are awarded the contract for your project, we will provide the extended warranty of 10 years to cover your Hydrazzo pool finish.

We at The Pool Works of Florida, Inc. will always provide the best craftsmanship and quality for every project we are awarded.

Donald Ball

Donald Ball, President

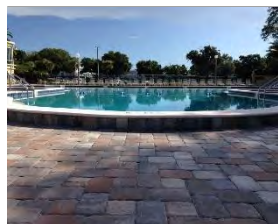


5 Year Workmanship Warranty



State of Florida Pool Contractor, License # CPC1457968

The Pool Works of Florida, Inc.
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commercial construction

For nearly two decades we have developed a commercial portfolio with a wide range of solutions for new construction projects. We partner with manufacturers that share the same philosophy of supplying the best product and standing behind it.

Pools, Spas, Decks, Filtration Systems, Heating Solutions, Pavers, Splash Pads, Water Features, Custom-Cast Coping, Equipment Paks

renovation

With a full line of renovation services, we'll review the status of your commercial environment and explore the options. Whether a simple renovation or scalable upgrades, we'll discuss changes to ensure compliance according to the Florida Administrative Codes.

- Pool & Spa Resurfacing, Equipment Upgrades, Tile Replacement
- Ladders, Handrails, Main Drain Grates Pavers, Equipment Paks
- Deck Resurfacing, Paver Installations
- Custom-Cast Coping, Water Features, Splash Pads
- Heating Solutions, Salt Chlorination Systems
- LED Lighting Solutions, Health Department Code Upgrades

pool & spa finishes

With nearly twenty years of hands on industry experience, we can say that we work with the best manufacturer of commercial pool and spa finishes. We have been a partner with CL Industries for nearly 17 years. Their finishes come with a 10 year warranty, however due to our expertise they allow us to offer an exclusive Extended 10 Year Warranty.

Hydrazzo Pool & Spa Finishes

A silky smooth texture, combined with the proven durability of exposed aggregates.



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repairs

The Pool Works has experienced teams prepared to address a wide range of challenges that may occur throughout the life of your commercial environment.

- Pool & Spa Pumps, Equipment Paks
- Heaters (Electric, Natural Gas, Propane, Solar)
- Filtration Systems, Salt Systems, Chlorinators, Plumbing, Leak Detection & Repair, Stain Removal, Pool & Spa Lighting, Pressure Testing inspections, Tile, Coping, Pavers, Deck Surfaces
- Repairs as a result of a Health Department Inspection

service

Pools and Spas are complex and technical structures. If you add in the moving water, chemicals and swimmers using the facilities it takes its toll. A well planned maintenance program and procedures will extend the life of your pool, spa and deck.

- Pool, Spa, Equipment, Deck Evaluations, Equipment Maintenance
- Restoring Proper Paver Elevations, Deck Repair and Sealing, Coping and Tile Repair
- Paver Cleaning and Sealing, Health Department Inspection Report Review, Consultation Services

energy efficient solutions

We offer award winning products by industry innovators and leaders that are energy efficient, eco-friendly – saving you a lot of money.

- **Variable Speed Pumps** Save up to 90%
- **LED Pool & Spa Lighting** reduces energy consumption up to 89%.
- **Heating** - Air Source Heat Pumps can save you up to 75%.
- **Salt Systems** save you 75-80% over standard chlorine solutions.



We'll match a competitor's price on any exact project scope.



State of Florida Pool Contractor, License # CPC1457968

Commercial Pool Furniture

Servicing Greater Tampa Bay's Commercial Properties



The Pool Works is your one-stop resource for commercial pool furniture. We represent the leading American manufacturers in the industry. This brings diversity in design and style, while delivering on quality and performance.

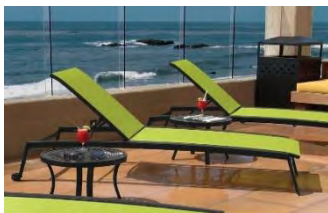
Whether you are looking for something simple or resort-style elements, we have it all. Our prices can't be beat...let us quote your next project!

Commercial Pool Furniture and Umbrellas

We are proud to represent the leading manufacturers of commercial pool furniture in the industry. Our pricing is so competitive, we aren't allowed to advertise it. Contact us for a quote or request an On-Site Consultation and experience incredible savings versus retail shopping!

Call Dawn Shanley 727.938.8389

Email Requests: dshanley@thepoolworks.com



Furniture Refurbishment Services

If your frames are still in great shape and it's simply time to re-strap, re-sling or replace cushions... We can refurbish any manufacturers chairs, chaise, ottomans and tables with a great selection of powder coating colors, fabrics and vinyl. We deliver, unpack, assemble & set up.

- Re-Sling
- Re-Strap
- Powder Coat
- Replacement Cushions

Set up an appointment at our place or yours.

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Tab 10



Rizzetta & Company

UPCOMING DATES TO REMEMBER

- **Next Meeting:** January 4, 2023 @ 6:00 PM

**District
Manager's
Report**

December 7

2022

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