

**HARBOUR ISLES  
COMMUNITY DEVELOPMENT DISTRICT**

**AGENDA PACKAGE**

**Tuesday, August 22, 2023**



2654 Cypress Ridge Boulevard  
Wesley Chapel, Florida 33544  
(407) 566-1935

# Agenda

## Harbour Isles Community Development District

**Board of Supervisors**

Betty Fantauzzi, Chairman  
 Bryce Bowden, Vice Chairman  
 Glenn Clavio, Assistant Secretary  
 Gregg Letizia, Assistant Secretary  
 Bob Nesbitt, Assistant Secretary

**Staff:**

Angel Montagna, District Manager  
 Vivek Babbar, District Counsel  
 Stephen Brletic, District Engineer  
 Paul Ramsewak, Onsite Manager

### Meeting Agenda Tuesday, August 22, 2023 – 11:00 a.m.

- 1. Call to Order and Roll Call**
- 2. Pledge of Allegiance**
- 3. Audience Comments on Agenda Items – Three- (3) Minute Time Limit**
- 4. Landscape Request for Proposals (proposals sent separately)**
  - A. Review of Board Summary ..... Page 5
    - i. Benchmark ..... Page 7
    - ii. BrightView ..... Page 45
    - iii. Juniper ..... Page 68
    - iv. RedTree ..... Page 154
    - v. Russell ..... Page 191
- 5. Public Hearing for Adoption of the Fiscal Year 2024 Budget**
  - A. Fiscal Year 2024 Budget ..... Page 227
  - B. Public Comment
  - C. Resolution 2023-04, Adopting the Budget..... Page 248
  - D. Resolution 2023-05, Levying the Assessments..... Page 252
- 6. Staff Reports and Updates**
  - A. SŌlitude Lake Management
  - B. Trimac Outdoor
  - C. District Counsel
  - D. District Engineer
  - E. Onsite Property Manager
    - i. Monthly Report..... Page 258
    - ii. Proposal #WQ348069 from Belson Outdoors ..... Page 265
    - iii. Proposal #1074 from Construction Management Services..... Page 267
    - iv. Proposal #291 from Hawkins Electric ..... Page 269
    - v. Proposal #1189681 from Home Service Heroes..... Page 273
    - vi. Proposal #1066 from Oasis Palms and Landscaping..... Page 276
  - F. Homeowner’s Association: Discussion of Flock Cameras..... Page 279
  - G. District Manager: Fiscal Year 2024 Meeting Schedule..... Page 283
- 7. Consent Agenda**
  - A. Minutes from the July 25, 2023, Meeting ..... Page 286
  - B. Financial Statements (July 2023) ..... Page 291
- 8. Discussion Items**
- 9. Supervisor Requests**
- 10. Audience Comments – Three- (3) Minute Time Limit**
- 11. Adjournment**

*The next meeting is scheduled for Tuesday, September 26, 2023*

**District Office: Inframark**  
 2654 Cypress Ridge Blvd., Suite 101  
 Wesley Chapel, Florida 33544

[www.HarbourIslesCDD.org](http://www.HarbourIslesCDD.org)

**Meeting Location: Harbour Isles Clubhouse**  
 121 Spindle Shell Way  
 Apollo Beach, Florida 33572

# **Section 4**

## **Landscape RFPs**



# **Subsection 4A**

## **Summary**

2023 Harbour Isles CDD Landscape RFP Proposal Board Summary - General Maintenance

Vendor	Turf Maintenance	Shrub Maintenance	Tree Maintenance	General Site : Trash and Debris	Irrigation System Maintenance
BENCHMARK	\$ 98,750.00	\$ 18,294.00	\$ 11,856.00	\$ 6,600.00	\$ 11,500.00
BRIGHTVIEW	\$ 79,121.56	\$ 44,867.24	\$ 10,850.00	\$ 6,656.00	\$ 7,920.00
JUNIPER	\$ 123,000.00	\$ 27,220.00	\$ 13,880.00	\$ 3,000.00	\$ 6,000.00
REDTREE	\$ 68,400.00	\$ 41,800.00	\$ 19,200.00	\$ 15,600.00	\$ 12,000.00
RUSSELL	\$ 79,200.00	\$ 31,680.00	\$ 10,000.00	\$ 28,800.00	\$ 17,340.00

2023 Harbour Isles CDD Landscape RFP Proposal Board Summary - Annual Pricing by Vendor

Vendor	Year 1 Pricing	Year 2 Pricing	Year 3 Pricing	3-Year Grand Total
BENCHMARK	\$ 147,000.00	\$ 151,410.00	\$ 155,952.30	\$ 454,362.30
BRIGHTVIEW	\$ 149,414.80	\$ 156,885.54	\$ 164,729.81	\$ 471,030.15
JUNIPER	\$ 173,100.00	\$ 178,453.00	\$ 178,453.00	\$ 530,006.00
REDTREE	\$ 157,000.00	\$ 157,000.00	\$ 161,710.00	\$ 475,710.00
RUSSELL	\$ 167,020.00	\$ 172,200.00	\$ 177,540.00	<b>\$516,760/math error in proposal</b>

2023 Harbour Isles CDD Landscape RFP Proposal Board Summary - Extra Services

Vendor	Price per Yard	Number of Yards	Annual Cost	Irrigation Hourly Rate
BENCHMARK	\$ 52.00	350	\$ 18,200.00	\$ 85.00
BRIGHTVIEW	\$ 55.00	380	\$ 20,900.00	\$ 55.00
JUNIPER	\$ 56.00	350	\$ 18,480.00	\$ 75.00
REDTREE	\$ 55.00	350	\$ 19,250.00	\$ 65.00
RUSSELL	\$ 65.00	325	<b>\$21,125/math error in proposal</b>	\$ 180.00

two person team



# Benchmark

LANDSCAPING

Harbour Isles CDD  
August 2023



Trusted Since 1975



**Benchmark**  
LANDSCAPING



# ABOUT US

## Benchmark Landscaping

Founded - 1975  
Headquarters - Celebration, FL  
150+ Team Members



Licensed Landscape Architects



ISA Certified Arborists



Certified Landscape Designers



FNGLA Certified Horticulture



Certified Pest Control Operators

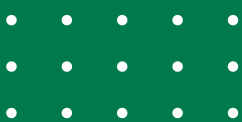


Licensed Irrigation Designers



# OUR SERVICES

We believe in a comprehensive 360-degree approach. Our in-house certified team members provide the highest quality care in all service areas to exceed your expectations.



Commercial Maintenance



Fertilizer & Pest Control



Design & Build



Enhancements



Irrigation & Water Management



Abor Care







# OUR COMMITMENT

Our clients include national companies, financial services, homeowner associations, multi-family complexes, educational institutions, health care, resorts & hotels.



## Vetted, Insured and Trained Crews

Our staff undergo a thorough background check and E-Verify, complete an extensive training process, and are paid industry-leading wages.

## On-Site Management

Relationships make the difference. A manager is always available on-site to keep the lines of communication open and to offer problem solving support.

## 24/7 Customer Care

With an in-house customer relations team, we are available 24/7. Call us when you need us.







# WHO

## WE SERVE

- Community Associations
- Commercial Properties
- Public Infrastructure
- National Accounts

## CONTACT US

### OUR OFFICE

**Headquarters** - Celebration, FL

**Branch** - Kissimmee, FL

**Branch** - Orlando, FL

**Branch** - Winter Haven, FL

**Branch** - Tampa, FL

 [www.benchmarklandscapingfl.com](http://www.benchmarklandscapingfl.com)  
[info@benchmarklandscapingfl.com](mailto:info@benchmarklandscapingfl.com)

 407-929-7610

**Call/Text**

## TRUSTED BY NATIONAL COMPANIES







# WHAT WE DO

## LANDSCAPE MAINTENANCE



Our Landscape Maintenance teams train in industry best practices. Landscape Maintenance is all about the details. We're committed to getting the details right so all can enjoy your landscape. Your dedicated Account Manager will provide regular updates about what we're doing to maintain your property.







# WHAT WE DO

## 02

### FERTILIZER AND PEST CONTROL

Our licensed and certified Fertilizer Technicians offer proactive services essential to maintaining a clean and healthy landscape. Benchmark Landscaping offers the expertise to provide plans tailored to the needs of the property. Proper care plans aid in eliminating weeds and keep pests at bay. These customized plans will ensure your property maintains that award-winning look all year long without adverse environmental impacts. If not used properly, excessive pesticide treatment could harm wildlife. Our certified Pest Control Operators develop effective and personalized fertilized and pest control plans based on the needs of the property.



# WHAT WE DO

## 03

### DESIGN AND BUILD

Whether you are building a new development and seeking a landscape design plan, or just want to enhance your existing landscape, our team of certified designers can bring your vision to life.

Benchmark's Landscape Installation Team provides expertise on plants, trees, turf and hardscape materials. Our goal is to provide long-term health and appearance of the project after installation.







# WHAT WE DO

## ENHANCEMENTS



Seasonal landscape enhancements bring your property to life by creating a “wow” factor. Our knowledgeable design team will advise on incorporating the right mixture of appropriate flowers for each season.







# WHAT WE DO

## IRRIGATION AND WATER MANAGEMENT



The most important part of your landscape is ensuring the right amount of water is being applied. Our Irrigation and Water Management team is essential in eliminating wasteful usage and consumption. Whether it's a new install or a sprinkler head, our technicians are certified and ready.







# WHAT WE DO

## ARBORCARE



With certified Arborists on-staff, Benchmark Landscaping brings over 25 years of experience in tree installation and maintenance. Our highly trained team of professionals understand the vitality of regular maintenance and are continuously educated on the latest information and newest techniques.





# FEATURED MAINTENANCE PROPERTIES



**SOLARA RESORT**



**HARMONY CDD**



**BALMORAL RESORT**



**MERIDIAN PARKS**



**ENTERPRISE CDD**



**WATERBROOKE**



**DISNEY SWAN RESERVE**



**THE GRAND AT CELEBRATION**



## FEATURED SAMPLE OF PRIOR DESIGN & BUILD PROJECTS

<b>Project Name</b>	<b>Project Amount</b>
<b>The Villages at Lady Lake (Multiple projects)</b>	\$ 5,500,000
<b>Balmoral Resort</b>	\$ 3,640,000
<b>Maronda Homes</b>	\$ 2,400,000
<b>Feltrim Sports Complex</b>	\$ 2,195,000
<b>Vestco Residential (Apartment Complexes Multiple)</b>	\$ 1,700,000
<b>Terraces Reunion</b>	\$ 1,600,000
<b>HGVC at SeaWorld</b>	\$ 1,500,000
<b>Starwood Vacation Ownership (Misc.)</b>	\$ 1,250,000
<b>Sunland Custom Homes</b>	\$ 1,000,000
<b>Feltrim Townhomes at Balmoral Resort</b>	\$ 980,000
<b>Mona Lisa at Celebration</b>	\$ 950,000
<b>Reunion Resort — Ginn</b>	\$ 950,000
<b>Rolling Acres Plaza at Lady Lake</b>	\$ 850,000
<b>Marriott Grand Vista Resort</b>	\$ 845,000
<b>Dolphin &amp; Swan Resort (Marriott/Tishman)</b>	\$ 750,000
<b>Mattamy Homes Soleil</b>	\$ 700,000
<b>Celebration Athletic Complex</b>	\$ 682,000
<b>Vistana Key West Buildings and Pool</b>	\$ 650,000
<b>Burkhardt Construction (City of Kissimmee)</b>	\$ 600,000
<b>Marriott's Cypress Harbour Resort</b>	\$ 548,000
<b>Arlington Ridge</b>	\$ 451,000
<b>Burkhardt Construction (City of Maitland Misc Projects)</b>	\$ 450,000
<b>Mattamy Homes Solara</b>	\$ 400,000



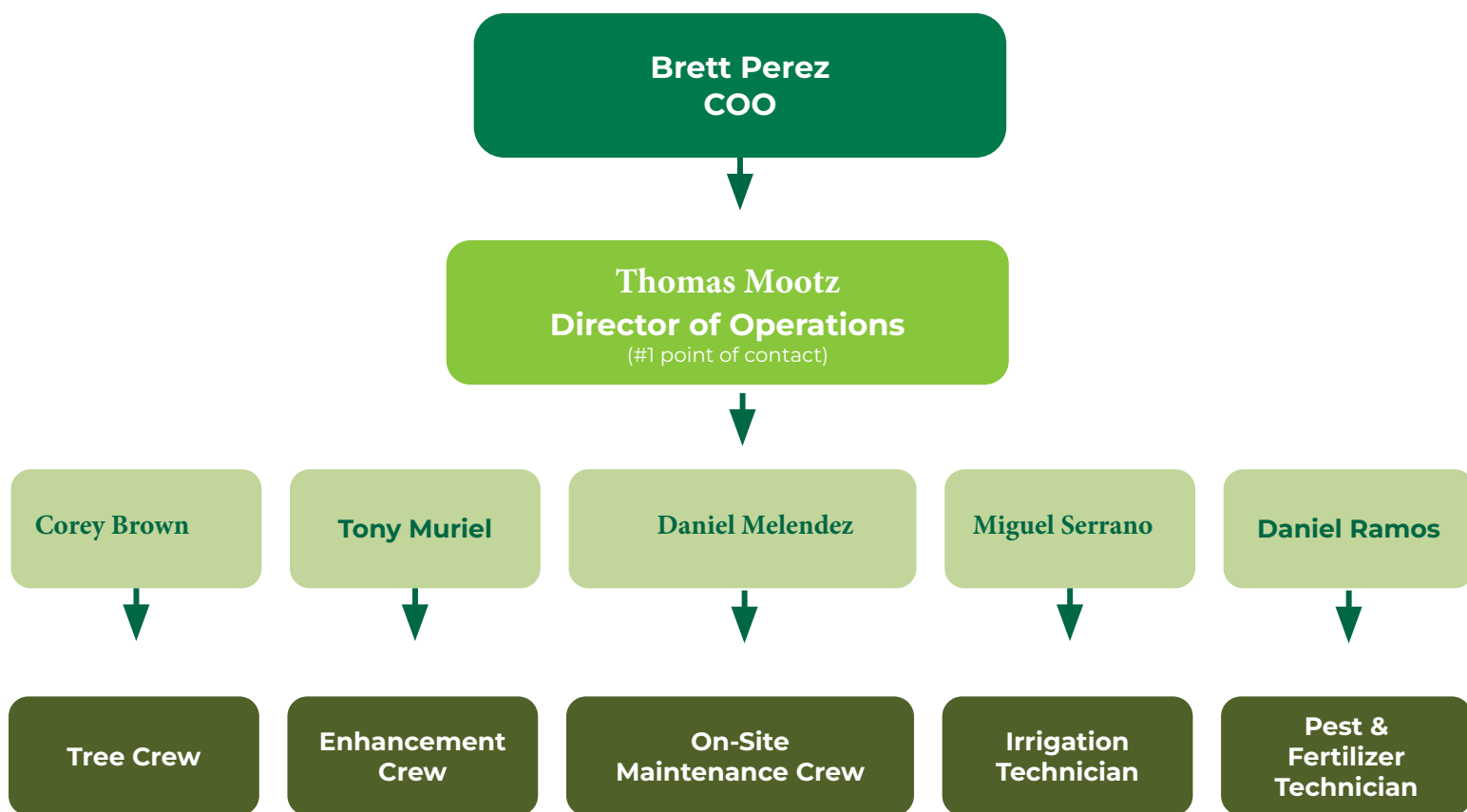


## FEATURED SAMPLE OF PRIOR DESIGN & BUILD PROJECTS

<b>Project Name</b>	<b>Project Amount</b>
<b>The Grand Resort at Celebration</b>	\$ 350,000
<b>Balmoral Banquet Center II</b>	\$ 335,000
<b>Hampton Inn &amp; Suites Clermont</b>	\$ 326,000
<b>HCOP Office Plaza</b>	\$ 320,000
<b>Feltrim Academy Office Park</b>	\$ 318,000
<b>Barranco Clinic</b>	\$ 312,000
<b>South State Bank</b>	\$ 290,000
<b>Promise Hospital Miami</b>	\$ 281,000
<b>Casselton Dr - City of Casselberry</b>	\$ 262,000
<b>North Lake Blvd, City of Altamonte Springs</b>	\$ 262,000
<b>International Drive Landscape/Hardscape</b>	\$ 225,000
<b>Gatorland Entry and Parking Areas</b>	\$ 212,000
<b>Blackstone Landing at Poinciana</b>	\$ 202,000
<b>Promise Hospital Miami</b>	\$ 281,000
<b>Casselton Dr - City of Casselberry</b>	\$ 262,000
<b>The Grande at Celebration</b>	\$ 200,000
<b>Haines City ER</b>	\$ 198,000
<b>Fort Maitland Park - City of Maitland</b>	\$ 175,000
<b>Celebration Spring Park</b>	\$ 170,000
<b>Sweetbay Supermarket</b>	\$ 162,000
<b>Santa Fe Crossings</b>	\$ 134,000
<b>Turkey Lake Plaza</b>	\$ 126,000
<b>Boyer Building Corp 429 building</b>	\$ 100,000

# YOUR PROPERTY TEAM

A dedicated team is assigned to your property, allowing us to be hands-on and proactive.



Harbour Isles Community Development District

**Official Proposal Form for  
Solicitation of Proposals for Landscape and Irrigation Maintenance Services**

Name of Proposer: Benchmark Landscaping

In accordance with the solicitation of proposals issued by the Harbour Isles Community Development District the undersigned proposes to provide all work necessary to perform the scope of services as described in the Project Manual.

Proposer submits that it can perform the work described above summarized as follows and as more specifically described in Proposer's proposal:

1. Turf Maintenance	\$ <u>98,750.00</u>
2. Shrub and Groundcover Maintenance	\$ <u>18,294.00</u>
3. Tree Maintenance	\$ <u>11,856.00</u>
4. General Site Maintenance: Trash and Debris Disposal	\$ <u>6,600.00</u>
5. Irrigation System	\$ <u>11,500.00</u>

<b>Total Yearly Cost for the first year of the above items</b>	\$ <u>147,000.00</u>
<b>Year 2</b>	\$ <u>151,410.00</u>
<b>Year 3</b>	\$ <u>155,952.30</u>
<b>3- Year Grand Total</b>	\$ <u>454,362.30</u>

6. Mulching for Tree and Shrub/Groundcover Bed Areas \$ 18,200.00

*Estimate of total cubic yards proposed to service the property: 350 yards*

*Cost of Mulch Per Cubic Yard* \$52.00

*Irrigation Hourly Rate for items not included in the Scope of Services:* \$ 85.00/ hour

Proposer, thoroughly reviewed all components of the Project Manual and has a thorough understanding of the work required, the site and conditions where the work is to be performed, local labor conditions and all laws, regulations and other factors affecting performance of the work, having knowledge of the expense and difficulties attending performance of the work, and having fully inspected the site in all particulars, hereby proposes and agrees, if Proposer's proposal is accepted, to enter into the Proposed Agreement with the District.

Name of Authorized Signatory of Proposer: Brett Perez

Title of Authorized Signatory of Proposer: Chief Operations Officer

Signature of Authorized Signatory of Proposer:  \_\_\_\_\_

**Affidavit for  
Public Entity Crimes, Scrutinized Companies, E-Verify, and Non-Collusion**

*[Solicitation of Proposals for Landscape and Irrigation Maintenance Services]  
Harbour Isles Community Development District*

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

Name of Proposer: Benchmark Landscaping

I am authorized to make this affidavit on behalf of my firm and its owner, directors and officers. I state that:

**Public Entity Crimes**

1. I understand that a “person” or “affiliate” who has been placed on the “convicted vendor list” following a “conviction” for a “public entity crime” (as those terms are defined in Section 287.133, Florida Statutes) for a period of 36 months following the date of being placed on the convicted vendor list, would render us ineligible to submit a proposal for this project.
2. Neither I, nor any person or affiliates with my firm, nor my firm has been placed on the convicted vendor list following a conviction for a public entity crime that would render us ineligible to submit a proposal for this project.

**Scrutinized Companies**

3. I understand that, pursuant to Section 287.135(2)(a), Florida Statutes, we would be ineligible to submit a proposal for this project if we are company that is on the “Scrutinized Companies that Boycott Israel List” (created pursuant to Section 215.4725, Florida Statutes) or are engaged in a boycott of Israel.
4. Neither I nor my firm are on the “Scrutinized Companies that Boycott Israel List” nor are we engaged in a boycott of Israel.

**E-Verify**

5. I understand that, pursuant to Section 448.095(2), Florida Statutes, we must comply with Florida’s E-Verify law in order to enter into an agreement with a public employer.
6. Our firm is registered with and uses the United States Department of Homeland Security’s E-Verify system to verify the work authorization status of all employees hired on or after January 1, 2021.
7. No public employer has terminated a contract with our firm under Section 448.095(2)(c), Florida Statutes, within the year immediately preceding the date of our proposal.
8. Our firm is currently in compliance and will remain in compliance, for the duration of the agreement, with all requirements of Section 448.095(2), Florida Statutes.
9. I understand that, if there is a good faith belief that our firm has knowingly violated Section 448.09(1), Florida Statutes, there is an obligation to terminate the agreement pursuant to Section 448.095(2)(c), Florida Statutes.
10. I understand that, if there is a good faith belief that one of our subcontractor(s) has knowingly violated the Section 448.09(1), Florida Statutes, but our firm has otherwise complied with its obligations thereunder, then our firm will be required to immediately terminate its contract with the subcontractor in order to continue providing services to a public employer.

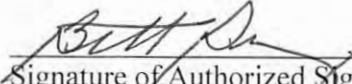
**Non-Collusion**

11. The price(s) and amount(s) of in our proposal have been arrived at independently and without consultation, communication, or agreement with any other proposer, potential proposer, proposal, or

potential proposal.

- 12. Neither the price(s) nor the amount(s) in our proposal, have been disclosed to any other firm or person who is a proposer or potential proposer, and they will not be disclosed before opening of all proposals.
- 13. No attempt has been made or will be made to induce any firm or persons to refrain from submitting a proposal, or to submit a price(s) higher than the prices in our proposal, or to submit any intentionally high or noncompetitive price(s) or other form of complementary proposal.
- 14. Our proposal is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- 15. Our firm, its affiliates, subsidiaries, officers, director, and employees are not currently under investigation, by any governmental agency and have not in the last 3 years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to any public contract, except as disclosed.

I state that I and the named firm understand and acknowledge that the above representations are material and important, and will be relied on by the Harbour Isles Community Development District for which our proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is, and shall be treated as, fraudulent concealment from the District of the true facts relating to the submission of proposals for this work.

  
 \_\_\_\_\_  
 Signature of Authorized Signatory of Proposer

Sworn before me on August 11<sup>th</sup>, 2023

  
 \_\_\_\_\_  
 Notary Public Signature



\_\_\_\_\_  
Notary Stamp

# **Exhibit A: Landscape Scope of Services**

## 1. TURF MAINTENANCE

### A. Mowing

All turf areas shall be mowed as needed so that no more than one-third (1/3) of the leaf blades are removed per mowing. Mowing shall be with a reel, rotary, or mulching mower, whichever is appropriate for turf species. Mowing speed will be set at manufacturer recommended pace, not at full throttle speed. Mower blades will be sharp at all times to provide a quality cut. Mowing height will be according to grass type and variety. Recommended turf heights after mowing is three-quarter (3/4) inches to one and one-half (1-1/2") inches for Bermuda turf, and three (3") to four (4") inches for St. Augustine Floratam or 'Bitter Blue'. Bahia turf shall be three (3") to three and one-half (3 1/2") inches after mowing. Clippings will be left on the lawn as long as no readily visible clumps remain on the grass surface thirty-six (36) hours after mowing. Otherwise, large clumps of clippings will be collected and removed by the Contractor. In the case of fungal disease outbreaks, clippings will be collected until the disease is controlled. **On CDD turf maintenance areas that abut conservation/wetlands, the contractor is responsible for maintaining a 15 ft. vertical cutback to keep mowing lines accessible as needed. The contractor shall not allow conservation/wetland vegetation to encroach onto mowable areas.**

After each mowing operation, the Contractor shall use a weed-eater or similar machine to trim grass that cannot be mowed with large machinery.

**Frequency:** St. Augustine grass will be mowed 42 times a year. Bahia turf grass will be mowed 36 times a year.

- i. St. Augustine grass will be mowed 42 times a year, weekly April through the end of October and every other week November through the end of March.
- ii. Bahia turf grass will be mowed 36 times a year, weekly May through September and every other week October through April.
- iii. All walkways, porches, parking areas, and curbs will be blown clean of any debris created from service following each mowing.
- iv. Mowing speed will be set at manufacturer recommended pace, not at full throttle speed.

### B. Edging

Contractor shall be responsible for edging all curbs, walkways and turf bed lines with a metal blade edger. All completed edges will have a perpendicular appearance between turf and hard surfaces, and turf and bed lines. An angled or beveled appearance of hard surfaces or bed lines is unacceptable. Weed eaters are not to be used in edging. Tree rings and plant beds and all buildings, sidewalks, fences, walls, driveways, parking courts, and other surfaced areas bordered by turf will be edged at every mowing. Turf around irrigation heads will be trimmed so as to not interfere with or intercept water output. Isolated trees and shrubs growing in lawn areas will require mulched areas around them (three feet minimum diameter) to avoid bark injury from movers and to reduce root competition from

grass. Contractor will clean all clippings from sidewalks, curbs, and roadways immediately after mowing and/or edging. Clippings will not be swept, blown or otherwise disposed of in storm sewer drains. Blowers will be used to clean sidewalks, curbs, and streets of organic material caused by mowing and edging.

**Frequency:** Weekly during growing season and as needed to keep within growing heights during off-season.

- i. All curbs, parking areas and sidewalks will be edged in conjunction with mowing schedule. Planting areas will be edged on a bi-weekly basis in growing season and at least once per month November through March.
- ii. Walls, posts, signs, valve boxes, transformers, utility boxes and other above-ground appurtenances shall be line trimmed in conjunction with mowing schedule even with mowed grass. Line trimming and edging will be accomplished without damaging any trees, shrubs or sprinklers.

### C. **Fertilization/pH Adjustment**

Contractor shall have full responsibilities of determining the proper formulations and rates of all fertilizers to maintain healthy vigorous turf. The Contractor shall take soil samples in at least three turf areas and one landscaped bed throughout the property to determine the pH level and any nutritional deficiency within thirty (30) days of the commencement of the landscape maintenance contract, and then at least once per year in January prior to springtime fertilization. Larger properties or properties with variable soil types may require additional soil samples. Soil samples shall be analyzed by a soil fertility laboratory to evaluate soil conditions for "soil fertility", including but not limited to pH, lime requirement, phosphorus (P), potassium (K), calcium (Ca), magnesium (Mg) and micro-nutrients. The testing laboratory shall be instructed to provide comments for improving soil fertility/pH for the turf crop. The procedure and cost of all soil or other testing analyses shall be the responsibility of the Contractor. Soil testing analysis results and comments shall be submitted to the District within a report comparing the results to prior year's results for comparison purposes.

The pH level should be between 6.5 and 7.0 for optimum growing conditions in turf. Add necessary soil amendments of sulfur to lower the pH or lime to raise the pH according to the soil testing laboratory recommendations.

Contractor shall be expected to apply any minor nutrients necessary to maintain a healthy turf. Turf shall be fertilized **four (4) times** per year in February, May, August, and November. Fertilizers shall be granular in composition and contain 30% to 50% of the nitrogen in slow or controlled release form. Fertilizer shall also contain magnesium and micro-nutrients (i.e. manganese, iron, zinc, copper, etc.). The amount of each nutrient to be applied to the turf at each frequency is to be determined by the recommendations of the soil testing laboratory.

Fertilizer will be swept off of walks and drives onto lawns and landscape beds. After fertilization, a minimum of one-fourth (1/4) inch of water will be applied by the Contractor.

**Frequency:** minimum of four times a year with additional applications as required based on field conditions or recommendation from soil fertility laboratory.



**D. Fire Ant Control**

During each maintenance visit, the Contractor shall monitor and treat ant mounds and nesting yellow jackets or other stinging insects throughout the property as required using a granular or drench method. Fire Ant mounds are to be removed and soil mounds leveled to previous grade after Fire Ants have been killed. The Contractor shall remove and dispose of wasps, bees and other subterranean insects in plant materials, on the ground or on site structures/furnishings.

**Frequency:** As needed

**E. Insect and Disease Control**

Contractor shall be responsible for inspections of the entire property and treatment of any insect or disease related problems during each maintenance visit. Turf areas destroyed by insects and/or fungus shall be repaired with sod at Contractor's expense. The Contractor will inspect lawn areas at each visit for indication of pest problems. Upon confirmation of a specific problem requiring treatment, pesticides will be applied as needed on a spot treatment basis using the least toxic, effective pesticide. All spraying of pesticides will be performed when temperatures are below those recommended by the manufacturer and wind drift is negligible. Records shall be kept on locations where pests were identified and treatment(s) rendered for control.

All pesticides, insecticides, fertilizers, and any other products must be used in strict compliance with label and instructions. Applications must comply with all state and federal regulations. The specifications are intended to be consistent with current label instructions. In the event the specifications conflict with instructions on the pesticide label, the label instructions shall govern. MSDS (Manufacturer's Safety Data Sheets) signs shall be placed in visible locations prior to spray applications.

**Frequency:** As needed

**F. Turf Weed Control**

All turf is to be maintained to control and strive to eliminate weeds. The program will include pre-emergent, post emergent, and physical (hand pulling) weed control methods. Contractor shall provide to the District a report on the existing turf condition within thirty (30) days of beginning the maintenance contract. The report will assess the amount of weeds in the turf and provide a management plan to remove the weed species found. The management plan shall include a level of acceptable weed growth and a schedule of herbicide treatment required to reach the level of acceptable weed growth.

**Frequency:** As needed

**G. Water**

Contractor shall be responsible for monitoring the moisture levels in turf areas and reporting any problems, in writing, that may be present during the maintenance visit. Contractor shall be responsible for damage to items that were not reported to the District in writing and will be responsible for replacement of these items.

Contractor shall not be responsible for the hand watering of any turf area unless plant material is under additional warranty.

**Frequency:** As needed

## **H. Retention/Detention Ponds and Pond Banks**

Bahia turf areas are to be mowed at a height of three to three- and one-half inches. Contractor shall notify the District of erosion along pond banks and provide written proposals for the repair of erosion.

**Frequency:** Bahia turf grass will be mowed 36 times a year, weekly May through September and every other week October through April.

## **2. SHRUB AND GROUND COVER MAINTENANCE**

### **A. Pruning**

All shrubs shall be hand pruned to remove dead and/or damaged wood to allow for natural development of plant material, and to create the effect intended by the District. Shrubs designated by the District to be shaped as a hedge will be pruned with mechanical or hand shears as needed to provide an informal shape, fullness, and bloom. Trim shrubs and hedges as necessary to maintain all appropriate safety indexes and to keep them looking neat and level as directed by the District. Pruning shall not create vertical sides to plants. Lower branches of shrubs shall be allowed contact with enough sun light for healthy growth. All branches, dead wood, cuttings shall be removed from the job site as the time of pruning and disposed at an approved brush site. All shrub areas damaged by pruning equipment shall be restored. Ground cover plants may need some cutting back to encourage lateral growth. The work area shall be left neat and clean after all trimming and pruning operations. All clippings and debris from pruning will be carted away at the time pruning takes place.

#### **Pruning shall include the following items:**

- i. Dead dying or unsightly parts of trees/shrub/ground cover
- ii. Sprouts growing at or near the base of a tree trunk
- iii. Branches that grow toward the center of the tree trunk
- iv. Crossed branches that may rub together
- v. Nuisance growth that interfere with view, traffic and signage. Nuisance growth includes the removal of all dangerous thorns spikes or appendages which may have potential conflict with people
- vi. Removal of browned foliage on ornamental grasses in early Spring

Deep hand pruning and/or structure pruning should be performed once a year during the dormant months. Structure pruning shall be defined as using hand pruners, hand saws, and/or loppers to prune

old wood and prune behind multiple breaks to maintain proper proportions, promote interior growth, and an aesthetically pleasing appearance. Removal of up to 20% of the height and foliage of plants shall take place during these pruning tasks, which will occur no more than once per year and only as required.

**Frequency:** Monthly

**B. Fertilization/ pH Adjustment**

Contractor shall have full responsibilities of determining the proper formulations and rates of all fertilizers to maintain healthy vigorous shrubs. Soil fertility shall be checked once per year as described in Section 1-C above. Contractor shall be expected to apply any minor nutrients necessary to maintain healthy shrubs. Nutrient deficiencies shall be treated with supplemental application of the specific lacking nutrient according to soil testing laboratory recommendations.

**Frequency:** Once yearly for testing – applications as required by soil testing laboratory recommendations

**C. Insect and Disease Control**

Contractor shall be responsible for weekly inspections of the entire property and treatment of any insect or disease related problems. The Contractor shall practice Integrated Pest Management (I.P.M.) to control insects, diseases, and weeds on and around perennials, ground covers, shrubs, vines and trees. This will include monitoring at each scheduled maintenance visit and spot treatment as necessary using the least toxic methods. All spraying will be performed when temperatures are within the recommended range of the product to be applied and when wind drift is negligible. First choice will be insecticidal soaps, horticultural oils and biological controls such as *Bacillus thuringiensis* (Bt) formulations. To eradicate more serious infestations by chewing or sucking insects, leaf miners and other pests, spray affected plants with special sprays and combinations of insecticide sprays suitable for the particular insect when the infection becomes evident and as often thereafter as necessary. Contractor shall be fully licensed to spray insecticides.

All pesticides, insecticides, fertilizers, and any other products must be used in strict compliance with label and instructions. Applications must comply with all state and federal regulations. The specifications are intended to be consistent with current label instructions. In the event the specifications conflict with instructions on the pesticide label, the label instructions shall govern. MSDS (Manufacturer's Safety Data Sheets) signs shall be placed in visible locations prior to spray applications.

**Frequency:** As needed

**D. Water**

Contractor shall be responsible for monitoring the moisture levels in shrub and groundcover beds and reporting any problems, in writing, that may be present during the maintenance visit. Contractor shall be responsible for damage to items that were not reported to the District in writing and will be responsible for replacement of these items.

Contractor shall not be responsible for the hand watering of any plants unless plant material is under additional warranty.

**Frequency:** As needed

**E. Bed Weed Control**

Weeds shall be controlled in bed areas by physical (hand pulling) and chemical methods. Bed areas shall be maintained to control weeds and strive to eliminate weeds. All shrub bed areas shall be maintained each mowing service by removing all weeds, trash and other undesirable material and debris to keep the area neat and tidy.

**Frequency:** As needed

**3. TREE MAINTENANCE**

**A. Tree Pruning**

Tree will be done once per year or as requested by the District. Prune, thin and trim trees as required to keep the trees healthy, to maintain the natural character of the variety, to control their shape and to maintain all appropriate safety indexes. Pruning in general shall consist of the removal of dead, broken, fungus infected, insect infected, and intertwining branches, vines and all other undesirable growth. Care shall be taken when pruning trees in landscape beds to create as little damage as possible to the plant materials below. Contractor shall be responsible for maintaining all trees such that no branches/limbs will overhang on sidewalks and parking areas lower than eight feet from the ground. Lower branching on all trees shall be pruned as needed, to keep them elevated to a uniform height. Trees located in natural areas shall be pruned only when their growth habit affects formal, maintenance areas. Limbs and branches are to be removed from property. All sucker growth from trunk and base of trees shall be removed weekly or as required to maintain a clean appearance. This includes the following areas, fishing piers, bridges and sheds. This is to include maintaining at all times a minimum of six to fifteen (6-15) feet of clearance under all limbs depending on location and species of tree. All clippings and debris from pruning will be carted away at the time pruning takes place.

Regardless of height, the Contractor shall be responsible for overall pruning of all ornamental trees such as Wax Myrtles, Crape Myrtles, American Hollies, Nellie R. Stevens Hollies, Ligustrums, East Palatka Hollies, Dahoon Hollies, Silver Buttonwoods, Treeform Oleanders, Sea Grapes, and other ornamental or flowering trees. Pruning will include the shaping of all heads, removal of conflicting branches and removal of interior sucker growth.

Cuts should be made with sharp and proper tools. When cutting parts of branches, leave a living bud at the end of the stub. Make cuts sufficiently close to parent stem, but leaving a one-half (1/2") inch to a one (1") inch nub, so that healing can readily start under normal conditions. On trees known to be diseased, disinfect tools with alcohol after each cut and between trees.

Dead tree removal is not the responsibility of the Contractor. Removal of dead limbs larger than six (6") inches in diameter is not the responsibility of the Contractor. Contractor is responsible to notify the District of dead trees and limbs that require removal by others.

**Palm Pruning:**

Palm pruning will be done weekly with smaller palms (less than 15' in overall height) and two times per year for larger palms and is limited to dead and /or brown fronds and seed pods. No green fronds will be removed. Palms should not be severely pruned. The practice of leaving the old fronds as skirts on these Palms is not acceptable. Contractor shall never climb Palms with spikes or any other equipment that can damage trunks of trees.

**Frequency:** As needed for smaller palms and 2 times/year for larger palms.

- i. *Ornamental Plants:* Will be pruned as needed to maintain a one (1) foot clearance from all building sides and other structures. A two (2) foot clearance from all roof eaves, and to always maintain a neat uniform appearance.
- ii. Trees will be pruned once a year.
- iii. *Palms:* Palm pruning will be done weekly with smaller palms (less than 15' in OA height) and two times per year for larger palms and is limited to dead and /or brown fronds and seed pods.
- iv. *Hardwood Trees:* All tree branches will be kept pruned from ground up to fifteen (15) feet for proper walking clearance at all times.

**B. Fertilization**

Existing mature trees do not apply. Fertilization applies to planted trees that have a caliper of ten (10") inches or less. Contractor is required to notify the District and make recommendations, in writing, of all other trees that may need supplemental fertilization. Fertilizer used on site should have labels attached.

Palms are to be fertilized three times per year using fertilizers especially formulated for Palms. Palm fertilizer shall be broadcast under foliage canopy at the rate of one (1) pound per inch of palm trunk diameter. Fertilizer shall not be placed against the trunk. Palm fertilizer shall be time release granular fertilizer formulated for palms "Palm Tree Fertilizer or Palm Special". A good balance fertilizer shall have 10% (Nitrogen), 5% (Phosphorous), 5% (Soluble Potash) and the necessary secondary (trace) plant foods such as Magnesium, water-soluble Magnesium, Manganese, Zinc, Boron, Copper and Iron. Palms shall be closely monitored for any sign of nutritional deficiency, especially concerning the following elements: nitrogen, potassium, magnesium, manganese, and iron, and for any sign of rot, smut, or spotting.

**Frequency:**

- i. *Turfgrass Fertilization:* St. Augustine Turfgrass areas will be fertilized (4) times per year. Treatments will include a high-quality fertilizer and/or a micronutrient/iron supplement. Fertilizer rates are adjusted according to turf health, maturity, and desired growth patterns.
- ii. *Bahia Fertilization:* Bahia grass will be fertilized (2) times per year.
- iii. *Shrub Fertilization:* Shrubs will be fertilized (2) times per year. Treatments will include a high-quality fertilizer and/or a micronutrient/iron supplement. Fertilizer rates are adjusted according to shrub health, maturity, and desired growth patterns.

- iv. *Palm Fertilization:* Palms will be fertilized (2) times per year. Treatments will include a high-quality fertilizer and/or a micronutrient/iron supplement. Fertilizer rates are adjusted according to palm health, maturity, and desired growth patterns.
- v. *St. Augustine Turfgrass and Ornamental Pest Control Treatments:* During each treatment the St. Augustine turf and ornamentals will be inspected for damaging insects, active diseases and weeds. Treatments will be applied according to current industry standards, applicable laws and restrictions.

### C. **Insect and Disease Control**

Contractor shall be responsible for weekly inspections of the entire property and treatment of any insect or disease related problems. Insect and disease problems found in existing mature trees is not the responsibility of the Contractor but reporting those problems to the District is required.

Routinely check palms for signs of distress or disease in the trunks, buds, or fronds. Any evidence of disease affecting the palms is to be reported to the District at once. With District authorization, the Contractor shall plan for proper evaluation and treatment of the problem. Inspect all palms, especially the Phoenix varieties during the month of March, for infestation of Palmetto Weevil.

The Contractor shall monitor those palms which are susceptible to Ganoderma butt rot. Should this disease be found on any palm, the Client shall be notified in writing, including a location map of the palm, whereby appropriate action on a case-by-case basis shall be directed by the District. Every precaution will be made to contain the disease and keep it from spreading to other palms. Proper care and procedures with equipment and maintenance around Ganoderma infected palms will be followed in accordance with University of Florida Cooperative Extension Service recommendations.

All pesticides, insecticides, fertilizers, and any other products must be used in strict compliance with label and instructions. Applications must comply with all state and federal regulations. The specifications are intended to be consistent with current label instructions. In the event the specifications conflict with instructions on the pesticide label, the label instructions shall govern. MSDS (Manufacturer's Safety Data Sheets) signs shall be placed in visible locations prior to spray applications.

**Frequency:** As needed

### D. **Water**

Contractor shall be responsible for monitoring the moisture levels in bed areas and reporting any problems in writing that may be present during the maintenance visit. Contractor shall be responsible for damage to trees that were not reported to the District in writing and will be responsible for replacement of these items.

**Frequency:** As needed

### E. **Staking**

Staked trees shall be re-staked and adjusted as often as necessary. Stakes shall be adjusted and/or removed when deemed appropriate by Contractor. However, trees that need to be re-staked utilizing specialized equipment and crews shall be done at a mutually agreed upon price, submitted in writing to the District for review and approval.

**Frequency:** As needed

#### **4. GENERAL SITE MAINTENANCE: TRASH AND DEBRIS DISPOSAL**

##### **A. Cleanup Procedures**

As a part of each weekly maintenance visit, a general cleanup program will occur. The cleanup program shall involve a policing of all maintained areas for the removal of paper, cans, bottles, sticks, cigarette butts, leaves, and other debris. A complete sweeping or blowing, by mechanical means, of the entire roadways, curbs, gutters, drains, and sidewalk areas will also be performed. This will encompass complete removal of weeds at curbs and pavement lines, and other trash that has settled in these areas. Parking lot areas will be kept clean within 15 feet of curbs and planted areas. All debris shall be disposed of off-site.

**Frequency:** Weekly

##### **B. Doggie Stations**

All Doggie Stations shall have the trash removed and trash bags checked and replaced twice a week. On-site staff of vendor will replace the dog waste bags, contractor will be responsible for supplying the trash receptacle bags and disposing off-site. (Mondays/Fridays)

##### **C. Weed Control**

All parking lot areas, curb and gutters, driveways, volleyball courts, kiddies playground, pool deck sidewalks and roadways shall be maintained to control and strive to eliminate weeds. All tree rings and ornamental plant beds will be continuously controlled of weeds and grass encroachment.

**Frequency:** As needed

##### **D. Leaf Collection**

The frequency of leaf removal will vary based on the maturity and species of trees on the property. On a monthly basis, the Contractor will collect leaves from focal areas, pavement, and turf areas to prevent heavy build-up and cause damage to plant material by smothering. Additional frequencies may be required for heavy seasonal leaf drop from deciduous trees. Fallen leaves shall be collected and disposed of off-site; however, if the District agrees to dispersal of the leaves within natural areas within the property leaves may be directed to these designated areas.

**Frequency:** As needed

##### **E. Typical Weather Event Cleanup**

Contractor shall be responsible for debris cleanup deposited by typical weather conditions.

**Frequency:** As needed

**F. Dead Shrub Removal**

Dead plant material, not requiring general arborist practices for removal shall be removed and disposed of immediately by the Contractor. Contractor shall contact and advise the District, in writing, of possible replacements. Plant replacement necessitated by negligence of the Contractor shall be the sole responsibility of the Contractor.

**Frequency:** As needed

**G. Retention/Detention Ponds and Pond Banks**

Access paths/easements to the ponds are to be kept clear of foliage and debris. Pond banks shall be kept clear of all debris along the water's edge and within three feet of the water's edge. Removal of floating debris is not the responsibility of the Contractor. Removal of aquatic weeds is not the responsibility of the Contractor.

**Frequency:** As needed

**H. Site Manager**

A site manager/foreman shall be assigned to the community with whom the District Representative may communicate and perform field visits on a regular basis. The Contractor will be responsible for providing bi-weekly reports that will include a detailed account of the tasks performed, condition of the site and any recommendations.

**5. IRRIGATION SYSTEM**

**A. Irrigation Management**

Contractor agrees to monitor, adjust and manage all automatic irrigation systems **(58 zones and 6 battery operated timers)** as to proper frequency, duration, and operation of supplemental watering. Contractor shall be responsible for performing minor adjustments and services such as: flow control, radius adjustment, nozzle cleaning, sprinkler height, and level adjustment. Contractor will notify the District of malfunction or damage to the system's integrity. Routine irrigation maintenance is to be completed monthly.

**Minor irrigation repairs, 2 inches and under, which shall include the replacement of any irrigation PVC pipe, nozzle, head or rotor that is inoperable due to normal use of the irrigation system will be performed by the Contractor and shall be included in the Bid Price.** Should it be determined that damage is cause of negligence by the District, the District shall pay the cost of such repair. In case of major irrigation system mal-function Contractor shall promptly inform the District of the damage and provide a proposal for repairing the system.



Contractor shall be responsible for performing a complete irrigation evaluation at Commencement of the Agreement or as needed. Contractor shall be required to furnish the District with a report of the overall operational quality of the irrigation system. Contractor shall furnish recommendations for repair and improvements to the systems with an itemized cost for proposed work. Irrigation clocks shall have each zone identified within thirty (30) days of Commencement of the Agreement with a station number, general description of the area to be watered and suggested run time of each zone. The Contractor shall also attach waterproof zone tags to the top of zone valves with zone numbers that correspond to the numbering system at the control clock.

Shrubs, groundcovers, and turf around sprinkler heads shall be trimmed to maintain maximum clearance at all times for greatest coverage.

The on-site Property Manager shall be notified what day and time of the week the irrigation tech will be available servicing the community.

**Frequency:** Monthly

## 6. MULCHING FOR TREE AND SHRUB/GROUNDCOVER BED AREAS

### A. Pine Bark Mulch

Applications of 'Mini-Nuggets' Pine Bark mulch will occur at the District's approval. Mulch is to be spread at a depth of two (2") inches such that none of the old or previously laid mulch is visible. Contractor is responsible for accurate measurement of all bed areas and tree circles as part of the bid process.

Contractor is responsible for spot mulching of any bare soil areas that have resulted due to landscape maintenance performance i.e., mower damage around bed lines, tree wells, etc. Spot mulching of beds shall be completed with matching mulch types that are existing on site.

Can be installed upon request at a cost negotiated at time of request. **The District reserves the right to subcontract out the mulch application. This cost will not be included in the monthly landscape service invoice and be invoiced separately.**

**Frequency:** As requested by the District

### B. Trenching

Bed line edges shall be trenched and beveled at a depth of three inches along bed areas that are bordered by sidewalks, curbs, and seasonal color bed areas. A three-inch deep trench is not required along turf bed lines. All tree wells located in turf areas should have root balls raked smooth, removing all old water rings or excessive soil, etc., making all tree wells as uniform in size and shape as possible. Tree well root ball rings within turf areas are to be made uniform in diameter to be consistent with similar varieties.

**Frequency:** As needed when mulching is approved by the District



## INITIAL 90 DAY PLAN

### Day 30

- Property Audit - Maintenance, Irrigation, Enhancement
- Monthly Review: Client, Acct Mgr, Branch Mgr
- Review first month expectations, progress on key initiatives, and any adjustments
- Confirm Account setup and communication guidelines
- Site Inspection with client
- Confirm site maintenance plan for next 30

### Day 60

- Monthly Review: Client, Acct Mgr, Production Mgr
- Confirm scope alignment & expectations are being exceeded
- Review details of site inspection and carryover items
- Confirm progress on Audit items
- Confirm weekly schedule with Client

### Day 90

- 90 day Review: Client, Acct Mgr, Branch Mgr
- Review Follow-Up partnership transition guide
- Review details and schedule for Enhancements
- Check progress and/or completion of initial site audit initiatives
- Confirm all account setup and communication guidelines

# SAMPLE FERTILIZER REPORT

Phone: (407) 929-7610  
 Email: service@benchmarklandscapingfl.com  
 Address: P.O. Box 471057  
 Celebration, FL 34747



**Benchmark**  
 LANDSCAPING

*Committed To Providing Superior Service*

Client Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Service Date: \_\_\_\_\_  
 Service Tech: \_\_\_\_\_

RE-ENTRY INTERVAL (REI): Please stay off the turf for \_\_\_\_\_ and out of the beds for \_\_\_\_\_.

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**TREATMENT TURF**

	Product Name	Spray or Granular	Quantity of Chemical
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____

**TREATMENT HEDGES & TREES**

	Product Name	Spray or Granular	Quantity of Chemical
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____

**TREATMENT ORNAMENTALS**

	Product Name	Spray or Granular	Quantity of Chemical
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____

Office Use Only:

T \_\_\_\_\_  
 C \_\_\_\_\_

# SAMPLE IRRIGATION INSPECTION REPORT



**Benchmark**  
LANDSCAPING

Property Address: \_\_\_\_\_

Timer: Days: \_\_\_\_\_

Property Name: \_\_\_\_\_

Times: \_\_\_\_\_

Date: \_\_\_\_\_ Arrival Time: \_\_\_\_\_

Technician: \_\_\_\_\_

Zone Number	1	2	3	4	5	6	7	8	9	10	11	12
Nozzle												
Rotary Nozzle												
4" head												
6" head												
12" head												
4" rotor												
6" rotor												
Valve												
Solenoid												
Riser												
1/2" line												
3/4" line												
1" line												
+1" line												

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## ADDITIONAL COMPANY INFORMATION

### **Occupational License**

Orange County #3125-1107442

### **Agricultural Bond**

(Required by state law if dealing in plants, trees, and sod)

Bond #119892-1

### **Registered Irrigation Contractor License**

Lake County # 9673

Volusia County # 02010705

Polk County # 06338-IR

Marion County # 7174

Osceola County # IRR-052

Ocoee # 50-0660

Citrus County # 2751

### **Pest Control License**

# JB202466

# JF257177

### **FNGA's Landscape Certification**

Brian J. Shank, Jacob Mootz, Justin Green

### **Rain Bird Maxicom Hardware 1 & 2**

#### **Certified**

Brian Shank, Jacob Mootz, Miguel Serrano

### **FDOT Maintenance of Traffic Certification**

#741-110

#724-110

### **Trade References**

#### **Siteone Landscaping**

2968 N.Forsyth Rd

Winter Park, FL 32792

(407) 679-9099

Contact: Matt Houston

#### **Bloom-Masters**

325 Canal St.

Oviedo, FL 32765

(407) 323-6188

Contact: Shelby Griffis

#### **Dix Hite + Partners Inc**

150 West Jessup Ave

Longwood, FL

(407) 667-1777

Contact: Jeff Dix

# INSURANCE



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
09/30/2022

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

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

<b>PRODUCER</b> Brown & Brown of Florida, Inc. 2290 Lucien Way, Suite 400 Maitland FL 32751		<b>CONTACT NAME:</b> Tambi Hasanbik <b>PHONE (A/C No. Ext):</b> (407) 660-8282 <b>FAX (A/C, No):</b> (407) 660-2012 <b>E-MAIL ADDRESS:</b> Tambi.Hasanbik@bbrown.com															
<b>INSURED</b> Benchmark Landscaping LLC PO Box 471057 Kissimmee FL 34747		<table border="1"> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A: Southern-Owners Insurance Company</td> <td>10190</td> </tr> <tr> <td>INSURER B: Auto-Owners Insurance Company</td> <td>18988</td> </tr> <tr> <td>INSURER C: Bridgefield Casualty Insurance Company</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Southern-Owners Insurance Company	10190	INSURER B: Auto-Owners Insurance Company	18988	INSURER C: Bridgefield Casualty Insurance Company		INSURER D:		INSURER E:		INSURER F:	
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INSURER D:																	
INSURER E:																	
INSURER F:																	

**COVERAGES**      **CERTIFICATE NUMBER:** CL2293048587      **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL NSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GENL AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			72556623	10/01/2022	10/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPIOP AGG \$ 2,000,000 \$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> AUTOS ONLY			53-556623-00	10/01/2022	10/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$			53-556684-00	10/01/2022	10/01/2023	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
C	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	196-53781	10/01/2022	10/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

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

\*\*FOR INFORMATION PURPOSES ONLY\*\*

<b>CERTIFICATE HOLDER</b>	<b>CANCELLATION</b>
**Benchmark Landscaping, LLC BPRI ES Holding Company, LLC PO Box 471057 Kissimmee FL 34747-9057	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 

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## SAFETY TRAINING

### **Benchmark Weekly Safety Training**

Each week we review with our employees key safety practices which are then implemented on the job site. These weekly 'huddles' will help ensure an accident free work environment.

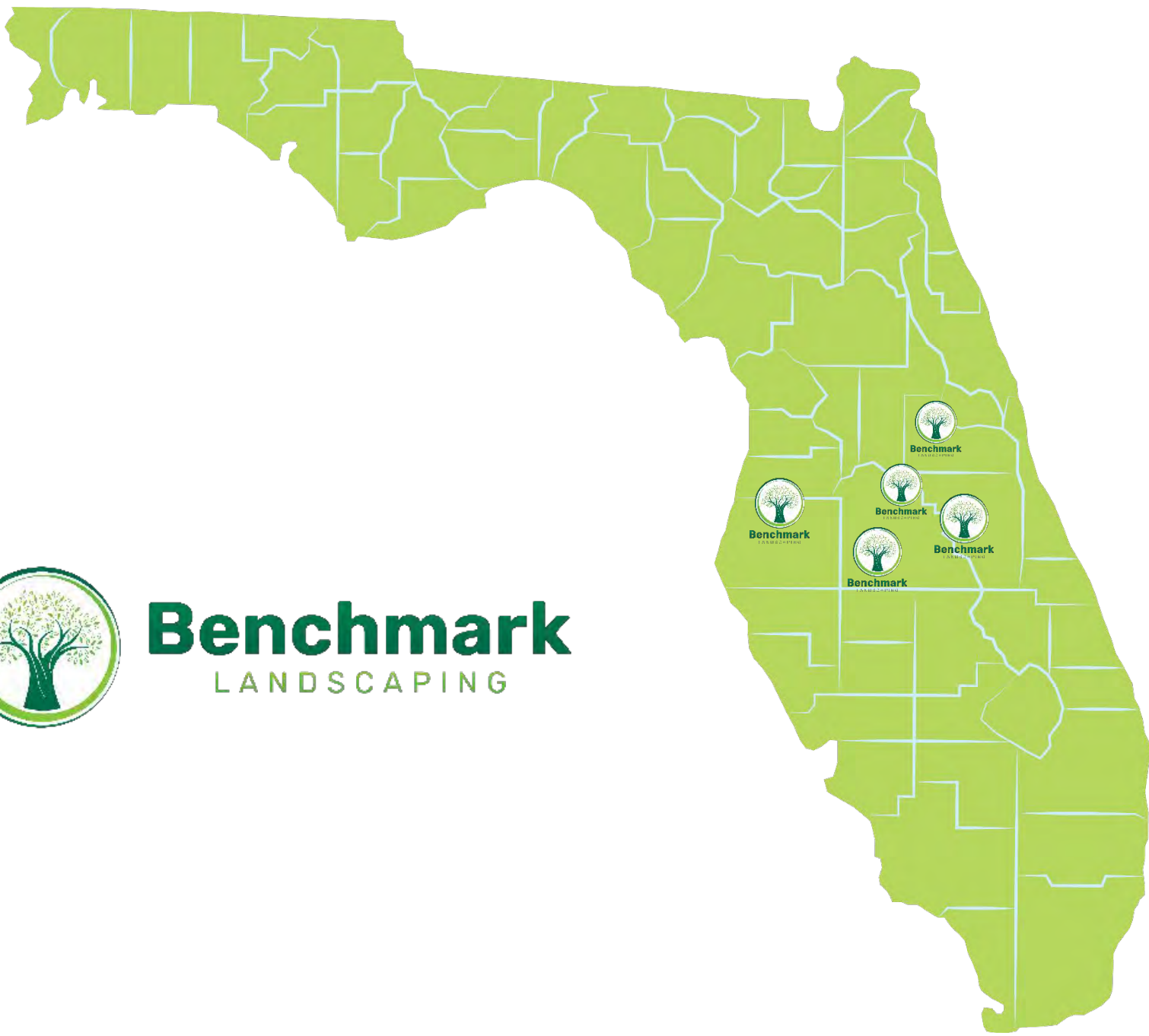
### **Landscape Safety Training Topics:**

- Blower Safety
- Driving Safety
- Fire Safety
- Hand Tool Safety
- Heat Stress
- Irrigation Safety
- Mower Safety
- Proper Backing Procedures
- Proper Loading
- Safety Training for New Employees
- Slope Safety
- Weed Eater Safety
- Working Near Pedestrians
- Chainsaw Safety
- Fall Protection
- Gas Shear Safety
- Hazardous Communication
- Hedge Trimmer Safety
- Person Protection Equipment (PPE)
- Proper Lifting
- Proper Pruning
- Trailer Safety
- Working Near Traffic
- Working in Public Spaces



NATIONAL  
ASSOCIATION OF  
**LANDSCAPE  
PROFESSIONALS**

**Safe Company  
Program**



# Benchmark

LANDSCAPING

[WWW.BENCHMARKLANDSCAPINGFL.COM](http://WWW.BENCHMARKLANDSCAPINGFL.COM)

407-929-7610 [info@benchmarklandscapingfl.com](mailto:info@benchmarklandscapingfl.com)





# Custom Landscaping Services for Harbour Isles CDD



27<sup>th</sup> Street Southeast, Ruskin, FL 33570  
Phone: (813) 641-3672  
Email: [Todd.Walters@BrightView.com](mailto:Todd.Walters@BrightView.com)

Proposal Issued: 7.26.2023

Proposal Valid Until: 10.26.2023



Dear Paul and Board Members,

On behalf of the Sun City BrightView team, I would like to personally thank you for the opportunity to submit our proposal to provide professional landscaping for Harbour Isles Community Development District.

We have carefully reviewed your specifications and have taken the time to ensure we have developed a thorough and comprehensive proposal that will suit your specific needs. There are a few key areas we have dedicated thought towards, including beautifying the property and communication.

We understand that your landscape is an expression of your community that can instill pride throughout the community. From day one, BrightView provides you with a beautiful, safe, and healthy landscape that will maximize your investment, support your needs, and provide a welcoming environment for everyone.

The enclosed proposal;

- Will demonstrate how our experienced and skilled team plan to aid in transitioning the community to a new landscape partner.
- Highlight how our Team will give pro-active advice, communicate effectively, and achieve your landscape goals.
- Provide a complete plan and solution for the various responsibilities identified in the RFP and pre-bid for the Community.

The Harbour Isles Community is an exceptional property, and it is understood that the quality of our landscape maintenance presentation, and the thoroughness of our plan, are integral to ensuring that your residents will be happy with the result. We appreciate the opportunity to get to know you, the site, and present you with our custom service solution.

Sincerely,

A handwritten signature in black ink that reads "Todd Walters".

Todd Walters  
*Business Developer*



# The BrightView Difference

Our people create and maintain the best landscapes on Earth.

We judge our success by the complete satisfaction of our customers. Every member of your landscape team will strive to earn your trust and loyalty through a proactive relationship in which we consistently perform work of the highest quality with unparalleled responsiveness.

Our ability to offer industry leading standards to our customers is attributed to our quality assurance and continuous improvement programs we have developed over our history.



## Our Mission

To create customer value through engaged local teams, providing industry-leading landscape services.

### DESIGN

Forward-thinking, constructible design that considers future operating costs.

- Landscape Architecture & Planning*
- Design Build*
- Program Management*

### DEVELOP

Seamless project delivery that meets your goals, on-time and on-budget.

- Planting*
- Hardscaping*
- Pools & Water Features*
- Tree Growing & Moving*

### ENHANCE

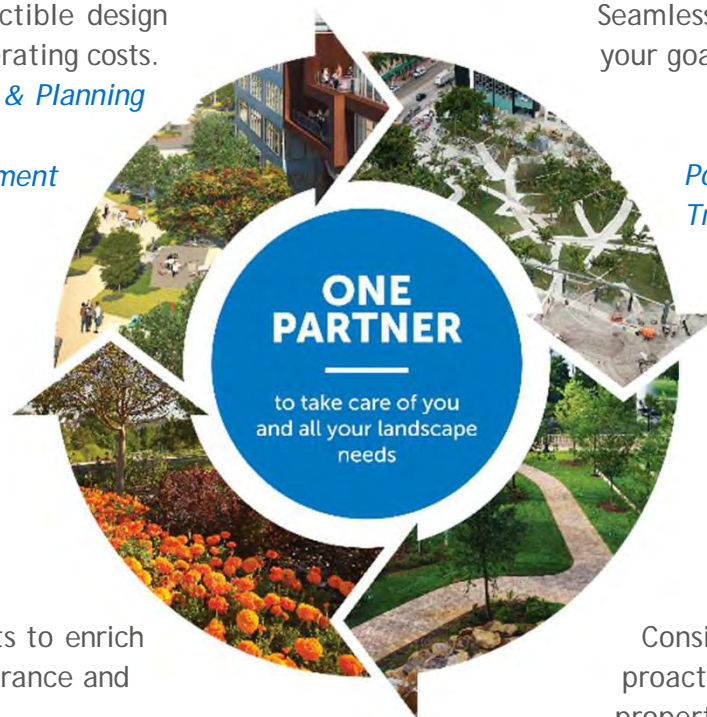
Thoughtful improvements to enrich your landscape's appearance and sustainability.

- Enhancements*
- Sustainability*
- Water Management*

### MAINTAIN

Consistent service delivery and proactive solutions that keep your property at its best, now and in the future.

- Landscape & Tree Care*
- Exterior Maintenance*







# Your BrightView Team

The team selected to maintain your property has the skills and experience necessary to meet your specific needs and expectations. We strive to find the most talented team members who are continuously advancing their skills and talents.

Below is your dedicated BrightView team and details about their background and experience.

*Everything we do to service our clients is handled with our local, dedicated service teams. Our team members live and work in the same communities that they are providing landscaping services to.*

Mark McCormick  
*Vice President & General Manager*

## Meet Your Team!



John Cornelius, Senior Branch Manager  
[John.Cornelius@BrightView.com](mailto:John.Cornelius@BrightView.com) |

John Cornelius has worked with BrightView for 35 years. He has an extensive knowledge regarding landscape maintenance and has spent the last 20+ years working out of the Sun City branch providing a unique understanding of the territory.



Vince Tort, Account Manager  
[Vince.tort@BrightView.com](mailto:Vince.tort@BrightView.com) |

Vince has over 25 years experience in landscape maintenance and agriculture. He is extremely knowledgeable when it comes to diagnosing and creating solutions. Vince is passionate about balancing worker safety and customer satisfaction.



Todd Walters, Business Developer  
[Todd.Walters@BrightView.com](mailto:Todd.Walters@BrightView.com) |

Todd has 20+ years of landscaping experience providing him a unique perspective as a Business Developer. He is not only passionate about developing relationships with the customers and their communities but also being a part of the team that ensures your landscaping needs and wants are met.





# Dependable, Quality Service

When you partner with BrightView, you have our commitment that we will manage your property and complete work on time and within budget. We provide the right equipment and manpower to perform any landscape project. Our team will take the same ownership, pride in the community and having all team members keep the site consistently looking like the residents expect. **Included in our price are services that are a resource to the community and are no additional charge for selecting BrightView as your trusted landscape partner.** Our team members participate in strict quality standards and continuous improvement training to ensure the service you receive is impeccable, efficient, and always excellent.



- ✓ **COMPANY HISTORY | LEGACY**  
 80+ years in the landscape industry: Design | Develop | Maintain | Enhance
- ✓ **ACTION PLAN | HORTICULTURAL ASSESSMENT | LANDSCAPE REPORT**  
 BrightView follows a written step by step process of how the management of your landscape requirements will be executed.
- ✓ **TRAINED SKILLED CLIENT SERVICE TEAMS**  
 800+ Employees in South West Florida Trained; Skilled in all levels of landscape management
- ✓ **TENURE OF MANAGEMENT STAFF**  
 Unmatched 15-year average management tenure in our South West Florida Branches.
- ✓ **IN HOUSE TECHNICAL SERVICE**  
 All of the technical services with regard to managing your landscape will require no third party involvement.
- ✓ **COMMUNICATION REPORTING TOOLS**  
 A Quality Services Assessment report will be done regularly as well as Irrigation Reports, Fertilization and Lawn and Ornamental Pest reports and logs of our Service Activities
- ✓ **DIGITAL ENHANCEMENTS**  
 In-house Local Landscape Designers to provide renderings of landscape improvements (See examples)
- ✓ **EMERGENCY STORM PLANNING**  
 With over 3000 employees in Florida we have proven that we are uniquely qualified to mobilize for hurricane recovery.





# Ensuring Quality



## QSA (Quality Site Assessment)

- Property evaluation by AM provided to customer
- Report with pictures, focus areas, and timelines
- Board and landscape committee invited

### QUALITY SITE ASSESSMENT Artisan Lakes



#### Notes to Owner / Client



- 5** Turf in back of amenity center is in good shape.
- 6** Oleanders in back of amenity center being attacked by caterpillars.
- 7** Playground area is in good shape. Beds and mulch are well maintained.

### QUALITY SITE ASSESSMENT Artisan Lakes



#### Maintenance Items



- 1** Remove palm sprouts emerging from crotons on south side of amenity center parking lot.
- 2** A few oak trees with broken stakes in parking lot for the amenity center. Need to be reset or removed.
- 3** Viburnum along amenity center parking lot are in need of pruning.
- 4** Many of the shrubs at the amenity center had too much mulch against the base of the plant. Minimizes soil oxygen for the roots and negatively affects the overall health of the plant.

### Quality Site Assessment

Prepared for: Artisan Lakes

#### General Information

DATE: Wednesday, Mar 22, 2023  
 NEXT QSA DATE: Monday, Jun 19, 2023  
 CLIENT ATTENDEES:  
 BRIGHTVIEW ATTENDEES: Jose Shears

#### Customer Focus Areas

Turf and Bed Maintenance

Quality you can count on.

7

Seven Standards of Excellence

1

Site Cleanliness

2

Weed Free

3

Green Turf

4

Crisp Edges

5

Spectacular Flowers

6

Uniformly Mulched Beds

7

Neatly Pruned Trees & Shrubs



# Delivering on Our Promise

We consider **communication** to be the key component of success with all our clients. That is why we take it very seriously.


Throughout a partnership with BrightView, you can expect that we will deliver effective and proactive communications with you.

We have developed a systematic approach to ensuring that our clients are kept in the loop with all aspects of their landscaping services. We have several resources that we leverage to make sure we keep lines of communication flowing.



*We make communication a priority and believe it is the key to delivering you the highest quality service, but also building a strong and lasting partnership. Our tools were created to ensure we maintain proactive and transparent lines of communication.*

Vince Tort  
Account Manager

**DEDICATED ACCOUNT MANAGER**

- Your go-to person for everything pertaining to your landscaping
- A knowledgeable and trained professional to help ensure your property shines



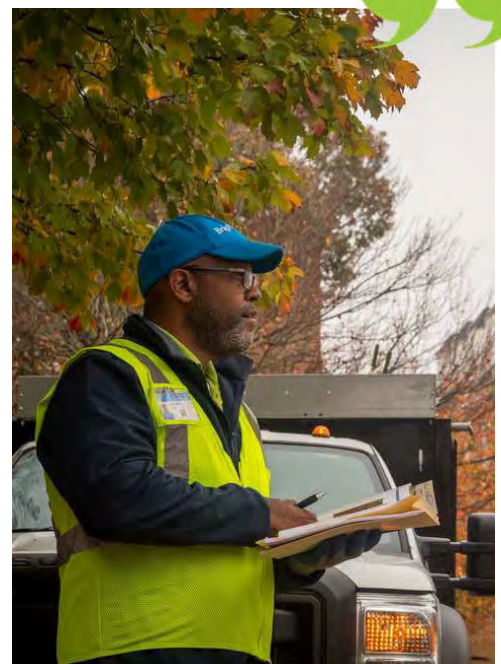
**REGULAR VISIBILITY**

- Review expectations
- Business reviews
- Scheduling and mapping services
- Regular visibility with your key stakeholders



**CUSTOMER SATISFACTION SURVEYS**

- Two times a year to drive engagement
- Understanding how we are performing
- Survey results help us have learn make changes to meet your expectations

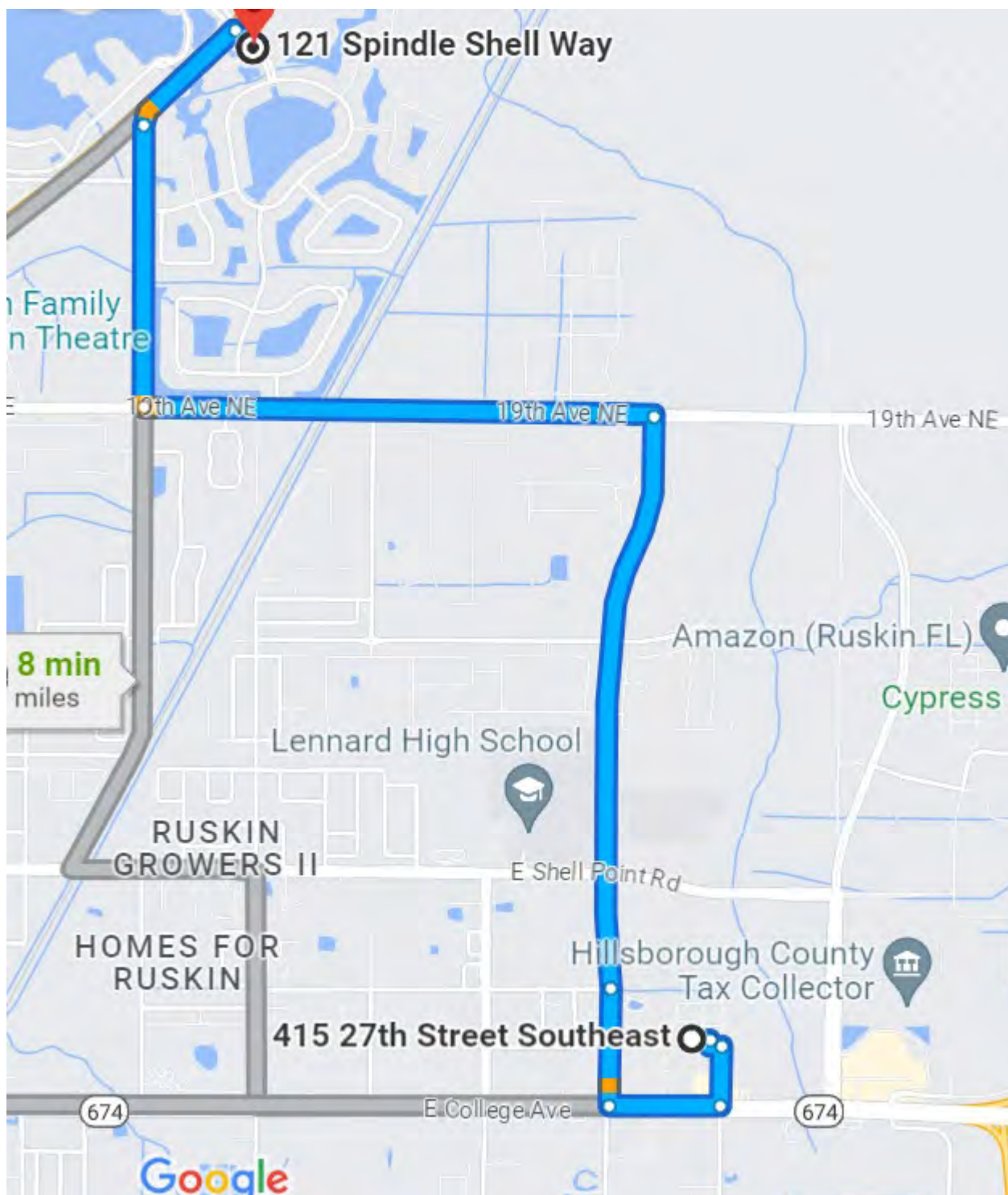






# Directions from BrightView

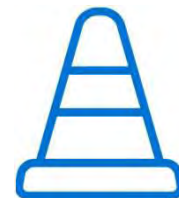
Harbour Isles is under 10 minutes from the BrightView office and only 4 miles away.







# Committed to Safety, Everyday



BrightView is committed to operating our business in a responsible manner. The opportunity to deliver world-class professional services and create inspiring and safe landscapes for our clients and customers is a privilege and responsibility that we work hard to protect and advance every day.

Our employees are regularly trained on their responsibilities and are held accountable to following all safety regulations. It is their responsibility to report unsafe conditions, which makes a safer environment for your employees.



## Extensive Training

BrightView crews receive ongoing formal and hands on field training to ensure we meet the highest safety standards in the business.



*At BrightView, we believe that safety is more than putting on a vest, safety glasses and gloves – it is woven into the fabric of our company.*



Maria Adams  
Branch Safety Leader

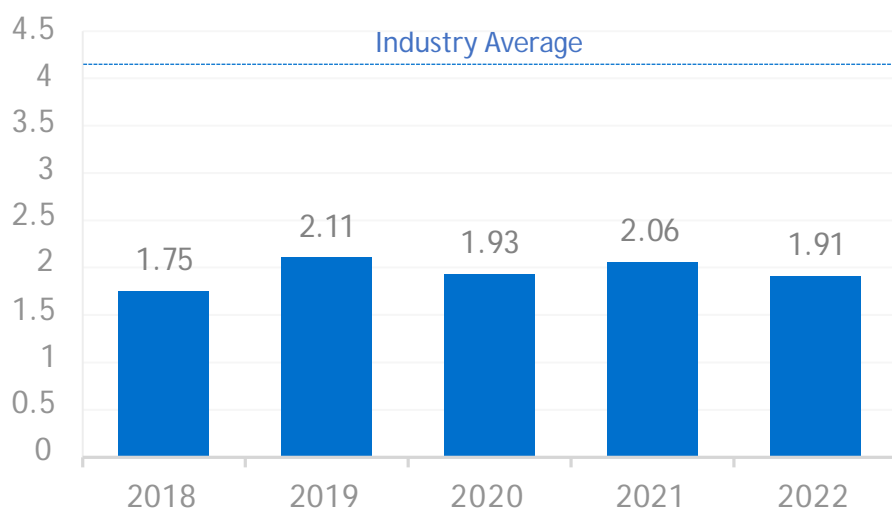


## Employee Verification Process

BrightView is enrolled in E-Verify in all states in which we operate to ensure 100% compliance with all US Labor and Immigration laws.

## OSHA Recordable Performance

Industry Average: 4.20



BrightView regularly performs better in safety than other landscape service providers.



## Personal Protective Equipment

Proper PPE is required of all team members engaged in jobsite production activities.



# Your Transition to BrightView

By selecting BrightView, you will find an experienced partner who will provide experts in many disciplines, each dedicated to your needs. In your first 180 days of service, you can reliably expect the following:

**PRE-SERVICE**

- Branch planning meeting
- Identify and mitigate any safety hazards
- Meet your Client Service Team
- Establish communication, reporting expectations & preferences
- Individual site planning

**30 DAYS**

- Initial site walk-through
- Week 1 Alignment Check
- Week 2 Alignment Check
- 30 Day Alignment Check
- Receive first invoice

**60 DAYS**

- Site walk of facility
- Receive Customer Satisfaction Survey
- Review survey responses with your Client Service Team
- Align and strengthen areas in need of improvement

**90 DAYS**

- Site walk of facility with your Client Service Team
- Review 90 Day Follow-up Partnership Transition Guide
- Check progress and/or completion of key site initiatives

**180 DAYS**

- Business Review: Client, Account Manager, Branch Manager
- Confirmation of team exceeding expectations, developing partnership
- Review/Update Client Partnership Plan for following season



*It is my job to ensure a smooth transition for our Clients and our Team. With the guidance of our transition plan and designated experts in their fields, we are committed to a seamless transition and a strong first step.*

**John Cornelius**  
Branch Manager



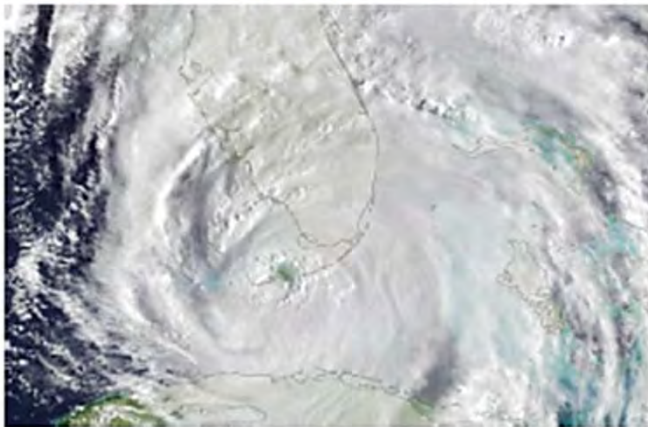




# Our Community is Important to Us...

When a catastrophe occurs such as most recently with Hurricane Ian, we have the capabilities and manpower to respond immediately. With 47 locations throughout the Southeast alone, we leverage our local and national resources to bring in additional teams and equipment from outside the area. This allows us to ensure the site is safe and free from hazards.

Resources from branch offices will be available in the event of an emergency to ensure our customers have access to crews and equipment quickly. We partner with generator-powered area hotels to provide accommodations for our staff. We have no FEMA obligations that would impact our ability to clean up your site in a prompt manner.



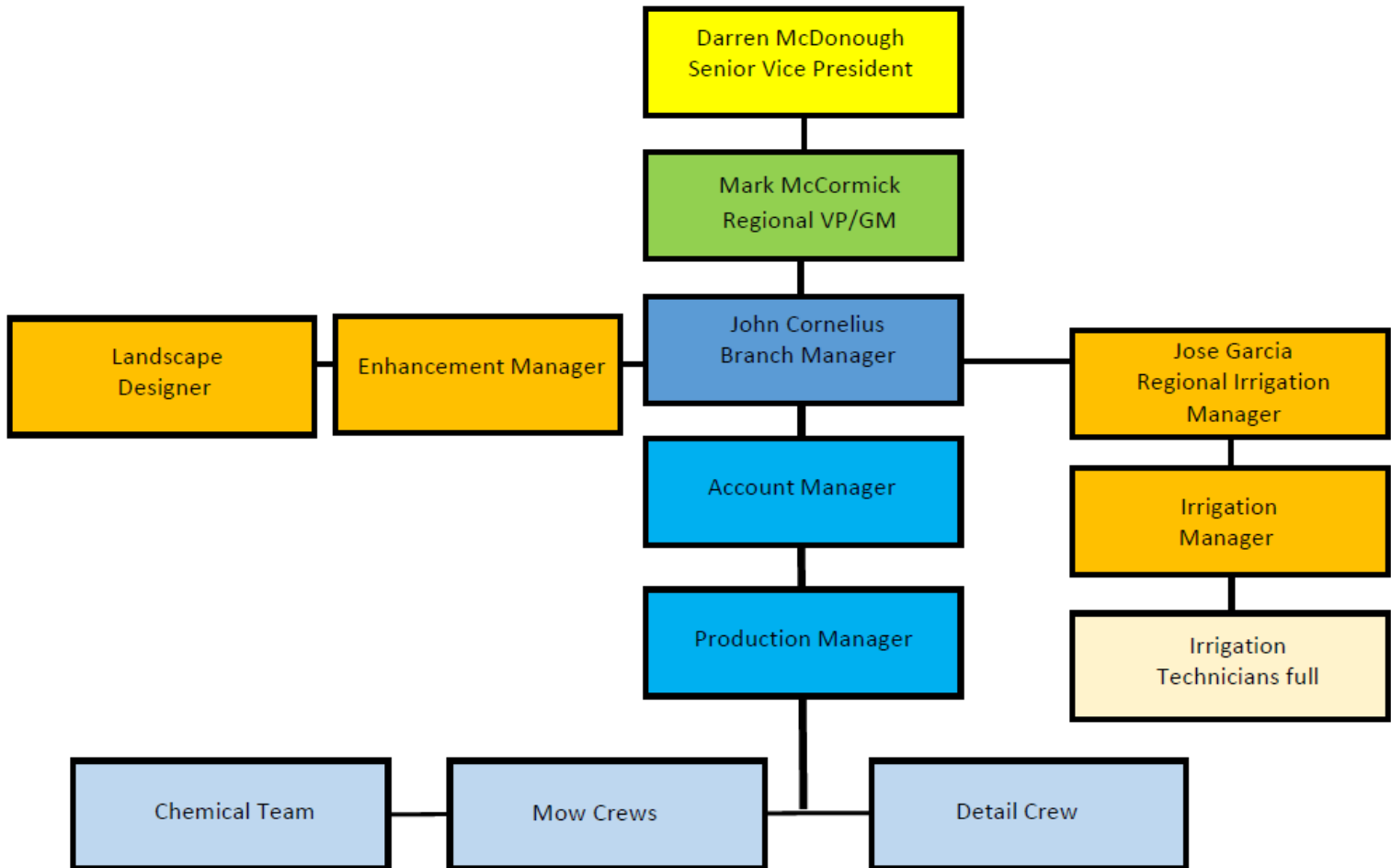
Your Account Manager will personally draw on resources and pull equipment from within the BrightView network to ensure your property is quickly, properly and safely serviced.





# Staffing Structure

## THE BRIGHTVIEW TEAM





# BrightView's Got Florida Covered

BrightView's dedication goes beyond our local communities, with branches spread throughout the entire state, we can assure we have the state of Florida covered!







# We Value Safety



U.S. Citizenship and Immigration Services



- To ensure 100% compliance with all labor and immigration laws, we are voluntarily enrolled in E-Verify in all states in which we operate.
- The organization's participation in E-Verify improves our ability to ensure the individuals we hire and who are working on our clients' sites are authorized to work in the United States.
- E-Verify is only part of our robust employment verification program. The program includes a consistent policy and process enterprise-wide, as well as regular training of our staff and semi-annual auditing to maintain compliance with labor and immigration regulations.
- BrightView also participates in the United States Citizenship and Immigration Services (USCIS) H-2B Visa program during seasonal periods when additional workforce is required.

The image shows a Form I-9, Employee Eligibility Verification, from the U.S. Citizenship and Immigration Services. The form is titled 'Employee Eligibility Verification' and 'Form I-9'. It includes sections for 'EMPLOYEE INFORMATION', 'EMPLOYER INFORMATION', and 'ATTACHMENTS'. There are checkboxes for 'I am an authorized worker in the United States' and 'I am not an authorized worker in the United States'. The form is partially obscured by a large blue watermark that reads 'I-9 FORM'.

# Customers Sold on BrightView

## Brightview Customers near you



### FairView POA

- Sun City, FL. (Bermuda Turf)
- Client Since 2020
- Services Include: Landscape and Irrigation Maintenance, Landscape Enhancements
- Kathy Trimmer 813.333.1047



### Caloosa Point II POA

- Sun City, FL. (Bermuda Turf)
- Client Since 2020
- Services Include: Landscape and Irrigation Maintenance, Landscape Design, Landscape Enhancement.
- Kathy Trimmer 813.333.1047



### Waterleaf CDD

- Riverview, FL.
- Client Since 2015
- Services Include: Landscape and Irrigation Installation and Maintenance, Landscape Design, Landscape Enhancement.
- Michael Sakellarides 813.564.6422





### Caloosa Point I POA

- Sun City, FL. (Bermuda Turf)
- Client Since 2020
- Services Include: Landscape Maintenance, Landscape Design, Landscape Enhancement, Palm Tree Pruning and Irrigation Maintenance
- Kathy Trimmer 813.333.1047



### Kings Point 19 Associations

- Sun City, FL.
- Client Since 1990
- Landscape Maintenance, Landscape Design, Landscape Enhancement and full Agronomic Program
- James Gundry 813.310.4023



### Sereno CDD

- Wimauma, FL
- Client Since 2015
- Landscape Maintenance, Landscape Design, Landscape Enhancement and Palm Tree Pruning
- Michael Sakellarides 813.564.6422





**Affidavit for  
Public Entity Crimes, Scrutinized Companies, E-Verify, and Non-Collusion**

*[Solicitation of Proposals for Landscape and Irrigation Maintenance Services]  
Harbour Isles Community Development District*

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

Name of Proposer: BrightView Landscape Services

I am authorized to make this affidavit on behalf of my firm and its owner, directors and officers. I state that:

**Public Entity Crimes**

1. I understand that a "person" or "affiliate" who has been placed on the "convicted vendor list" following a "conviction" for a "public entity crime" (as those terms are defined in Section 287.133, Florida Statutes) for a period of 36 months following the date of being placed on the convicted vendor list, would render us ineligible to submit a proposal for this project.
2. Neither I, nor any person or affiliates with my firm, nor my firm has been placed on the convicted vendor list following a conviction for a public entity crime that would render us ineligible to submit a proposal for this project.

**Scrutinized Companies**

3. I understand that, pursuant to Section 287.135(2)(a), Florida Statutes, we would be ineligible to submit a proposal for this project if we are company that is on the "Scrutinized Companies that Boycott Israel List" (created pursuant to Section 215.4725, Florida Statutes) or are engaged in a boycott of Israel.
4. Neither I nor my firm are on the "Scrutinized Companies that Boycott Israel List" nor are we engaged in a boycott of Israel.

**E-Verify**

5. I understand that, pursuant to Section 448.095(2), Florida Statutes, we must comply with Florida's E-Verify law in order to enter into an agreement with a public employer.
6. Our firm is registered with and uses the United States Department of Homeland Security's E-Verify system to verify the work authorization status of all employees hired on or after January 1, 2021.
7. No public employer has terminated a contract with our firm under Section 448.095(2)(c), Florida Statutes, within the year immediately preceding the date of our proposal.
8. Our firm is currently in compliance and will remain in compliance, for the duration of the agreement, with all requirements of Section 448.095(2), Florida Statutes.
9. I understand that, if there is a good faith belief that our firm has knowingly violated Section 448.09(1), Florida Statutes, there is an obligation to terminate the agreement pursuant to Section 448.095(2)(c), Florida Statutes.
10. I understand that, if there is a good faith belief that one of our subcontractor(s) has knowingly violated the Section 448.09(1), Florida Statutes, but our firm has otherwise complied with its obligations thereunder, then our firm will be required to immediately terminate its contract with the subcontractor in order to continue providing services to a public employer.

**Non-Collusion**

11. The price(s) and amount(s) of in our proposal have been arrived at independently and without consultation, communication, or agreement with any other proposer, potential proposer, proposal, or



potential proposal.

- 12. Neither the price(s) nor the amount(s) in our proposal, have been disclosed to any other firm or person who is a proposer or potential proposer, and they will not be disclosed before opening of all proposals.
- 13. No attempt has been made or will be made to induce any firm or persons to refrain from submitting a proposal, or to submit a price(s) higher than the prices in our proposal, or to submit any intentionally high or noncompetitive price(s) or other form of complementary proposal.
- 14. Our proposal is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- 15. Our firm, its affiliates, subsidiaries, officers, director, and employees are not currently under investigation, by any governmental agency and have not in the last 3 years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to any public contract, except as disclosed.

I state that I and the named firm understand and acknowledge that the above representations are material and important, and will be relied on by the Harbour Isles Community Development District for which our proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is, and shall be treated as, fraudulent concealment from the District of the true facts relating to the submission of proposals for this work.

*todd walters*

\_\_\_\_\_  
Signature of Authorized Signatory of Proposer

Sworn before me on August 9, 2023

*Linda Kay Ellis*

\_\_\_\_\_  
Notary Public Signature



\_\_\_\_\_  
Notary Stamp





# Insurance Summary and Certificate

<b>ACORD</b>		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY) 09/22/2023				
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.								
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).								
<b>PRODUCER</b> Am Risk Services Central, Inc. Philadelphia PA Office 100 North 18th Street 15th Floor Philadelphia PA 19103 USA		<b>CONTACT NAME:</b> PHONE (A.C. No. Ex.): (866) 284-7122 FAX (A.C. No.): (800) 565-0109 <b>E-MAIL ADDRESS:</b>						
<b>INSURED</b>		<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>				
BrightView Landscapes, LLC 990 Jolly Road Suite 300 Blue Bell PA 19422 USA		INSURER A: ACE American Insurance Company INSURER B: American Guarantee & Liability Ins Co INSURER C: INSURER D: INSURER E: INSURER F:		22687 26247				
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER: 570095477626</b>		<b>REVISION NUMBER:</b>				
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. <span style="float: right;">Limits shown as requested</span>								
TRM LTR	TYPE OF INSURANCE	AUTO INSR	SUBR WVD	POLICY NUMBER	POLICY EFF. DATE (MM/DD/YYYY)	POLICY EXP. DATE (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO. JEOT <input checked="" type="checkbox"/> LOC OTHER:			XSL647318197 SIR applies per policy terms & conditions	10/01/2022	10/01/2023	EACH OCCURRENCE \$2,000,000 DAMAGE TO RENTED PREMISES (Excludes auto) \$2,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADN INJURY \$2,000,000 GENERAL AGGREGATE \$5,000,000 PRODUCTS - COMPROMISE \$5,000,000	
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> OWN			TSA #1071343A	10/01/2022	10/01/2023	COMBINED SINGLE LIMIT (Ex accident) \$5,000,000 BODILY INJURY (For person) BODILY INJURY (For accident) PROPERTY DAMAGE (For accident)	
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION			AUC008196818	10/01/2022	10/01/2023	EACH OCCURRENCE \$4,000,000 AGGREGATE \$5,000,000	
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY OCCUPATION / (Mandatory) (Occupational Disease) (Mandatory) (N/A) (Type, describe under DESCRIPTION OF OPERATIONS below)		Y/N	WLRCS0827302 WC - ADS SCPCS0887405 WC - NT	10/01/2022	10/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH E.L. EACH ACCIDENT \$2,000,000 E.L. DISEASE (EA EMPLOYEE) \$2,000,000 E.L. DISEASE (POLICY LIMIT) \$2,000,000	
DESCRIPTION OF OPERATIONS: (LOCATIONS) (VEHICLES (ACORD 10), Additional Remarks Schedule, may be attached if more space is required)								
Evidence of Insurance:								
<b>CERTIFICATE HOLDER</b>				<b>CANCELLATION</b>				
BrightView Landscapes, LLC 990 Jolly Road Suite 300 Blue Bell PA 19422 USA				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS AUTHORIZED REPRESENTATIVE <i>Am Risk Services Central, Inc.</i>				

Holder Identification

Certificate No : 570095477626





# General Insurance

Insurance Broker for all except Crime: Aon

Insurance contact person: Tamara Fatilua: [tamara.fatilua@aon.com](mailto:tamara.fatilua@aon.com) and 847.442.9796

AON Production Team: [acs.chicago@aon.com](mailto:acs.chicago@aon.com)

# Surety Bond

## BOND INFORMATION

Bonding Company:	Travelers Property Casualty Group
	A.M. Best Rating: A++ XV (U.S. Treasury listed)
	Fidelity and Deposit Company of Maryland
	A.M. Best Rating: A+ XV (U.S. Treasury listed)
	Liberty Mutual Insurance Company
	A.M. Best Rating: A XV (U.S. Treasury listed)
	Aspen American Insurance Company
	A.M. Best Rating: A XV (U.S. Treasury listed)
	Westchester Fire Insurance Company
	A.M. Best Rating: A++ XV (U.S. Treasury listed)

Bonding Agent: Aon Risk Insurance Services West, Inc.

### \*Contacts:

George Gionis Email: [george.gionis@aon.com](mailto:george.gionis@aon.com) Phone: 1.215.255.1727

Meghan Hanes Email: [meghan.hanes@aon.com](mailto:meghan.hanes@aon.com) Phone: 1.213.620.1355

Performance and/or Payment Bond Working Line of Credit (requires underwriter approval):

Aggregate Amount \$750,000,000.00

Single Project \$100,000,000.00

Open Face Value of Current Bonds: \$500,000,000.00





# Harbour Isles Landscape Map







**Harbour Isles Community Development District**

**Official Proposal Form for  
Solicitation of Proposals for Landscape and Irrigation Maintenance Services**

Name of Proposer: BrightView Landscape Services, Inc.

In accordance with the solicitation of proposals issued by the Harbour Isles Community Development District the undersigned proposes to provide all work necessary to perform the scope of services as described in the Project Manual.

Proposer submits that it can perform the work described above summarized as follows and as more specifically described in Proposer's proposal:

1. Turf Maintenance	<u>\$ 79,121.56</u>
2. Shrub and Groundcover Maintenance	<u>\$ 44,867.24</u>
3. Tree Maintenance	<u>\$ 10,850.00</u>
4. General Site Maintenance: Trash and Debris Disposal	<u>\$ 6,656.00</u>
5. Irrigation System	<u>\$ 7,920.00</u>

---

<b>Total Yearly Cost for the first year of the above items</b>	<b><u>\$ 149,414.80</u></b>
<b>Year 2</b>	<b><u>\$ 156,885.54</u></b>
<b>Year 3</b>	<b><u>\$ 164,729.81</u></b>
<b>3- Year Grand Total</b>	<b><u>\$ 471,030.15</u></b>

---

6. Mulching for Tree and Shrub/Groundcover Bed Areas	<u>\$ 20,900.00</u>
--	---------------------

*Estimate of total cubic yards proposed to service the property:* 380

*Cost of Mulch Per Cubic Yard* \$ 55

*Irrigation Hourly Rate for items not included in the Scope of Services:* \$ 55



Thank you for the opportunity to present our landscape solution.

Should you have any questions, please don't hesitate to reach out.



Todd Walters, Business Developer

[todd.walters@BrightView.com](mailto:todd.walters@BrightView.com)

941-224-0031



***Juniper***

**DESIGN | BUILD | MAINTAIN**

**Landscape Maintenance Proposal:**

**Harbour Isles CDD**

**Apollo Beach, Florida**

# TABLE OF CONTENTS

## INTRODUCTION

- Company Service Overview
- Sample Reports/Schedules

## PROPOSAL

- Proposal

## OUR SERVICES

- More Than Just Maintenance

## QAULIFICATIONS

- Certifications & Licenses

## PORTFOLIO

- Juniper Communities

Submitted by:

Bonnie C. Marshall

Client Relations Manager

Phone: 352-316-0264



August 14, 2023

Dear Angel Montagna & Board Members:

Thank you for the opportunity to be a part of your landscape maintenance contract bidding process for HARBOUR ISLES CDD. At Juniper, we understand that each project is unique because no two clients are the same. We bring a straightforward, focused analysis to each property's individual needs. Our commitment to quality, dependability, and industry best practices drives us forward. This commitment empowers us to meet our clients' requirements and to serve their expanding needs as our relationship continues to grow.

Juniper has been servicing communities throughout Florida for over 20 years and our skilled teams are dedicated to your landscape initiatives.

We look forward to having the opportunity to work with you and to discuss the enclosed information. If you have any questions, please contact me at 352-316-0264.

Thank you,

*Bonnie Marshall*

Bonnie C. Marshall  
Client Relations Manager

352-316-0264

[Bonnie.Marshall@JuniperLandscaping.com](mailto:Bonnie.Marshall@JuniperLandscaping.com)

[Junipercares.com](http://Junipercares.com)



# ROOTED IN FLORIDA

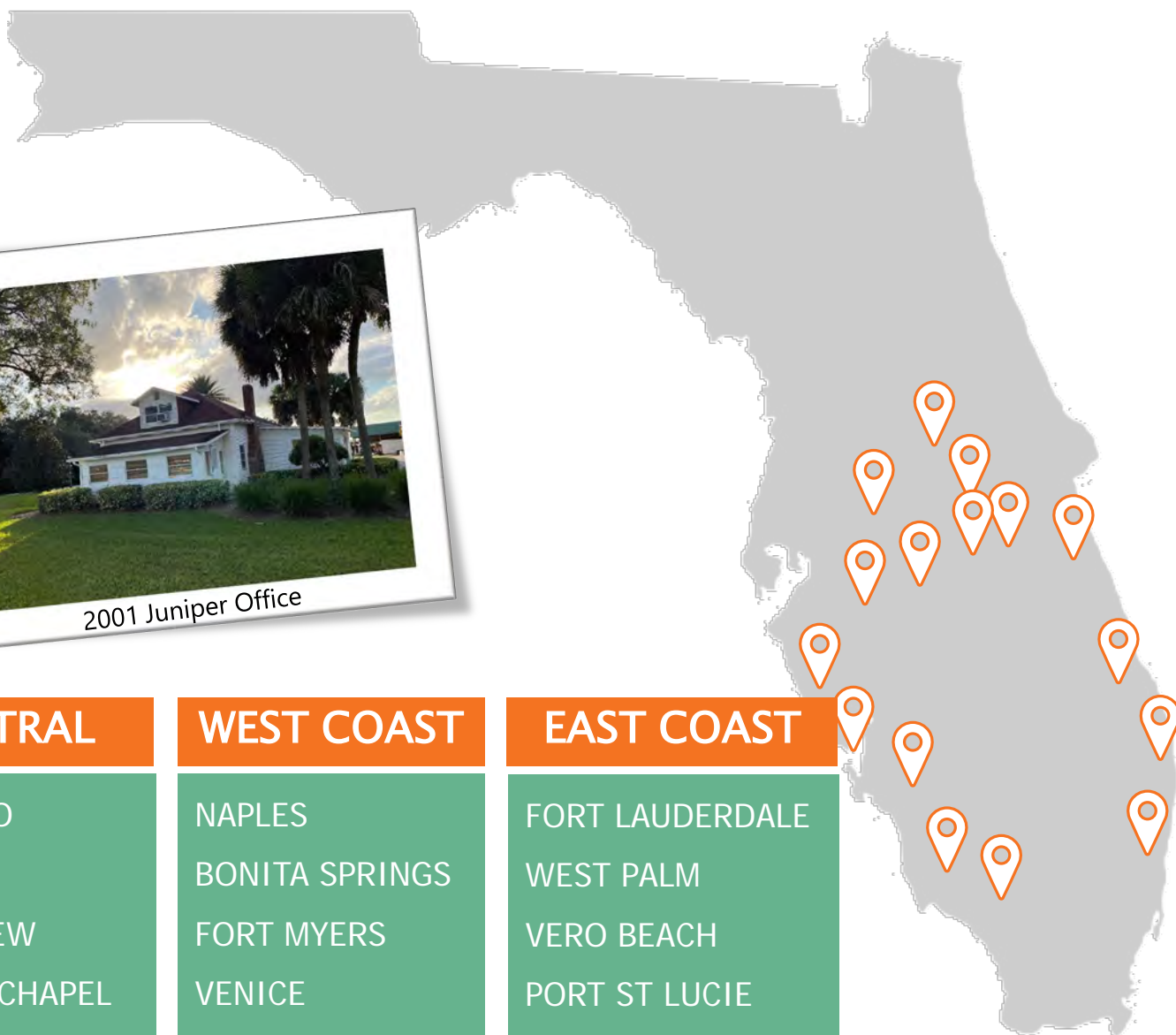
## HOW IT ALL STARTED

Juniper was founded in 2001 on a small farmhouse in Fort Myers, Florida. This location now serves as our corporate headquarters, though we have had to add a few more buildings. Over 20 years ago we started with the commitment to provide the best value and an on-time project. This commitment has helped Juniper grow from a small custom landscape operation with just a few employees to multiple locations throughout Florida. A lot has changed over the last 20 years, and we pride ourselves on the technology, service, and quality we continue to provide.

**Juniper was founded in Florida and all our leadership team lives in-state.**



2001 Juniper Office



### CENTRAL

- ORLANDO
- OCALA
- BELLEVIEW
- WESLEY CHAPEL
- LAKELAND
- LITHIA

### WEST COAST

- NAPLES
- BONITA SPRINGS
- FORT MYERS
- VENICE
- SARASOTA
- BRADENTON
- TAMPA

### EAST COAST

- FORT LAUDERDALE
- WEST PALM
- VERO BEACH
- PORT ST LUCIE
- MELBORNE
- VIERA

# COMPANY OVERVIEW

## SERVICES & QUALIFICATIONS

### DESIGN



### BUILD



### MAINTAIN



## Resources & Qualifications

- 1,800+ Team Members
- Licensed Landscape Architects
- Certified Landscape Designers
- Certified Irrigation Designers
- Certified Pest Control Operators
- FNGLA Certified Horticultural Professionals
- FNGLA Certified Landscape Contractors
- ISA Certified Arborists
- In-house Agronomist
- State of Florida Irrigation License
- Certified Hunter IMMS Installer
- Certified Rain Bird IQ Installer



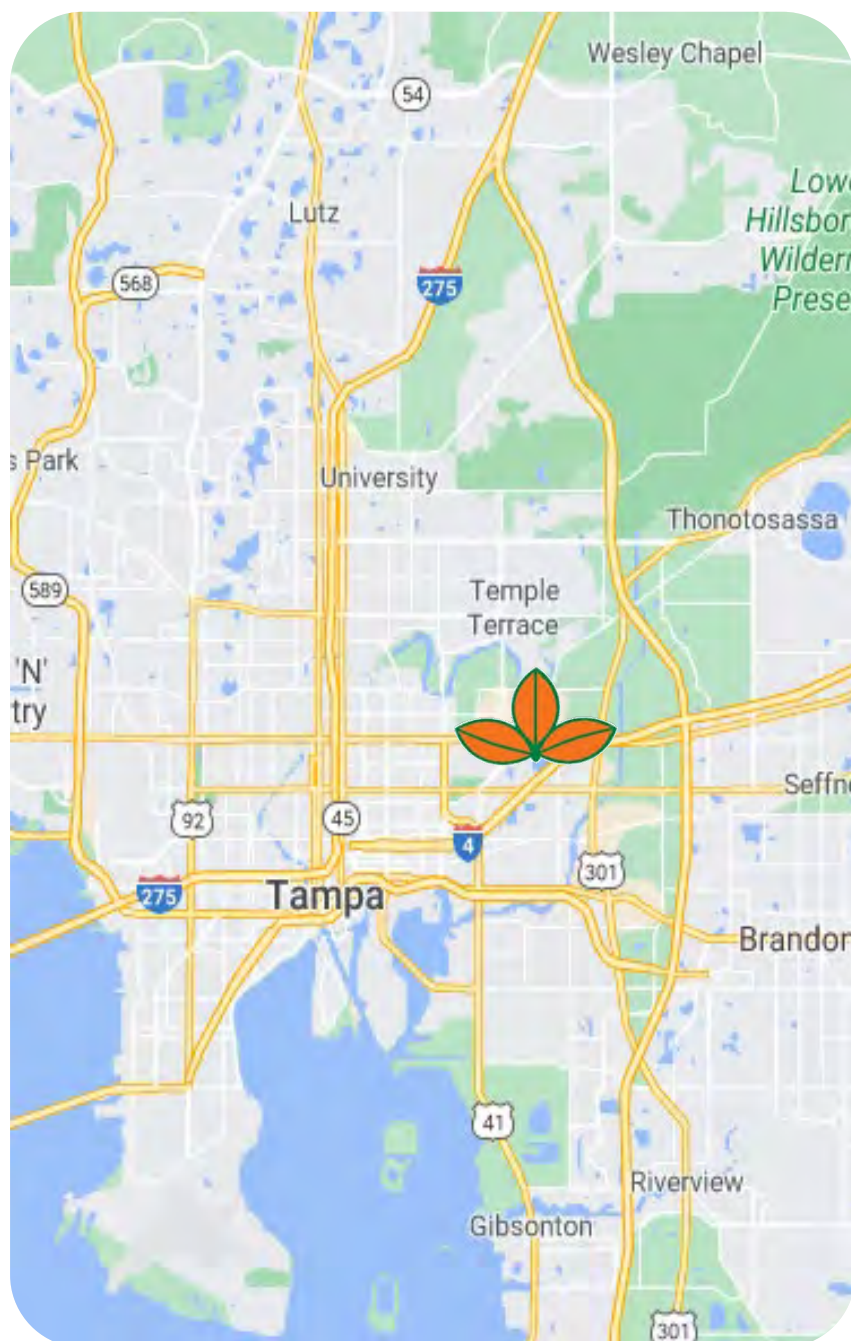
# LOCAL BRANCHES

## YOUR LOCAL LANDSCAPE EXPERTS

### TAMPA

7104 E 9th Ave  
Tampa, FL 33619

Our Juniper team members live in your area and are familiar with the local landscape palette.



We provide you with complete landscape services:

- Maintenance
- Irrigation
- Fertilization
- Pest Control
- Arbor Care
- Seasonal Color
- Storm Prep/Recovery
- Landscape Design
- Installation





# CLIENT TEAM

## RESOURCES



### OUR CORE VALUES

#### DESIGN - SUPPORT TEAM

- IA Certified Irrigation Designers
- Landscape Designers
- Landscape Architects

#### BUILD - SUPPORT TEAM

- State Licensed Irrigation Designers
- Licensed Hunter & Rain Bird Installer
- Certified Landscape Contractors

#### MAINTAIN - SUPPORT TEAM

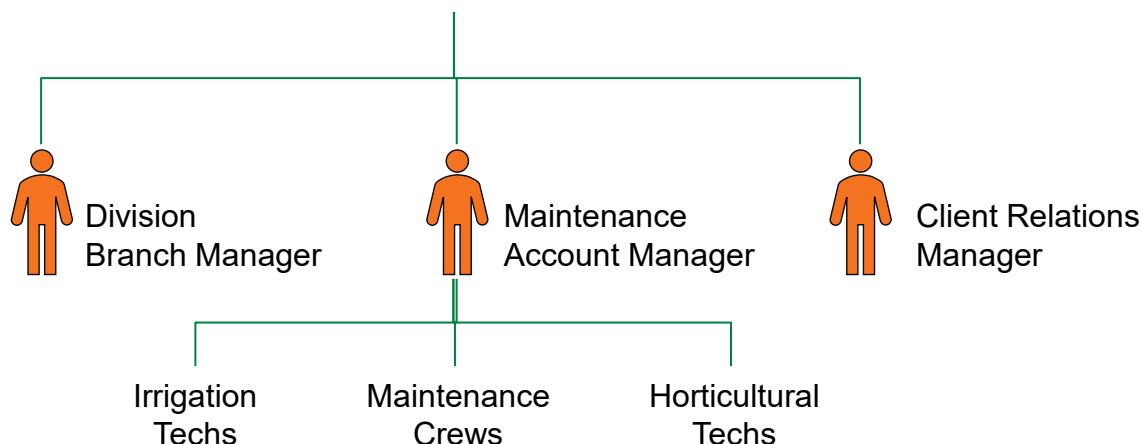
- Certified Horticultural Professional
- State Licensed Certified Pest Control Operator
- State Licensed Irrigation Contractor
- ISA Certified Arborists
- In-House Agronomist

- A Sense of Urgency
- A Constant Communicator
- Mission Over Ego
- We Do What We Say
- Relentless
- Grow and Adapt





# JUNIPER CLIENT TEAM



## BRANCH MANAGER

Oversees the overall quality of the project, ensures contract items are completed timely and communication reports are being completed. Works with account manager on managing all tree pruning and enhancements.

## ACCOUNT MANAGER

Works with association manager on updating of schedules and the quality control and verification of completion of work orders. Manages all service requests related to maintenance services and manages crews to meet scheduled services.

## IRRIGATION TECHNICIAN

Performs inspections of irrigation systems to ensure optimum operation and coverage for plant material and turf areas. Concerns are promptly documented on a service form and turned into the property manager for authorization.

## FERTILIZATION & PEST CONTROL TECHNICIAN

Performs regular inspections for shrub and lawn damaging insects such as mealybugs, aphids, spider mites, chinch bugs, sod webworms, and grubs.

## TURF MANAGEMENT

Our account managers perform regular inspections for lawn damaging insects such as chinch bugs, sod webworms, and grubs. This, combined with our comprehensive irrigation and fertilization program, will keep turf areas thick and healthy.

## SHRUB MANAGEMENT

Detailing includes trimming and pruning of all shrubbery, ornamental trees, and groundcover, removal of tree suckers, as well as the defining of bed lines and tree saucers. Our “weed first” approach ensures the spraying of pre and post emergent herbicides and pulling existing weeds is the project foreman’s priority.

## FERTILIZATION & PEST CONTROL

Our training program equips technicians and foreman to apply fertilizer as well as identify and correct plant material problems. Our management team and technicians have specialized training and GI-BMP Certifications from the University of Florida Extension Office, enabling us to be more proactive.

## WATER MANAGEMENT


Juniper’s water management team will effectively work to conserve your water supply. Water management is the key to a healthy landscape. By properly monitoring water quality and output, Juniper is able to establish a resilient root system while minimizing disease and pests. This multi-step process requires continuous review from environmental, operational and management teams.

# SERVICE REPORTS & MAPS

## SAMPLES

### Fertilization & Pest Reports

Horticulture Maintenance Check  
 Client Name: \_\_\_\_\_  
 Client Address: \_\_\_\_\_  
 Job #: \_\_\_\_\_  
 Technician: \_\_\_\_\_ Date: \_\_\_\_\_

  
 Design - Build - Maintain

LAWN CHECKLIST		SHRUB CHECKLIST		Products Used	Qty	Date	Reason	Temp
Granular Fertilizer	Micro Nutrients	Granular Fertilizer						
Liquid Fertilizer	Iron							

WEED CONTROL	INSECT CONTROL	INSECT CONTROL
Broadleaf	Chinch Bug	Scale
Sedge	Mole Crickets	Spider Mites
Grassy	Old world weevils	Lace Ings
Other	Army worms	Aphids
	Fire ants	Caterpillars
	Other	White Bee
		Thrips
		Other

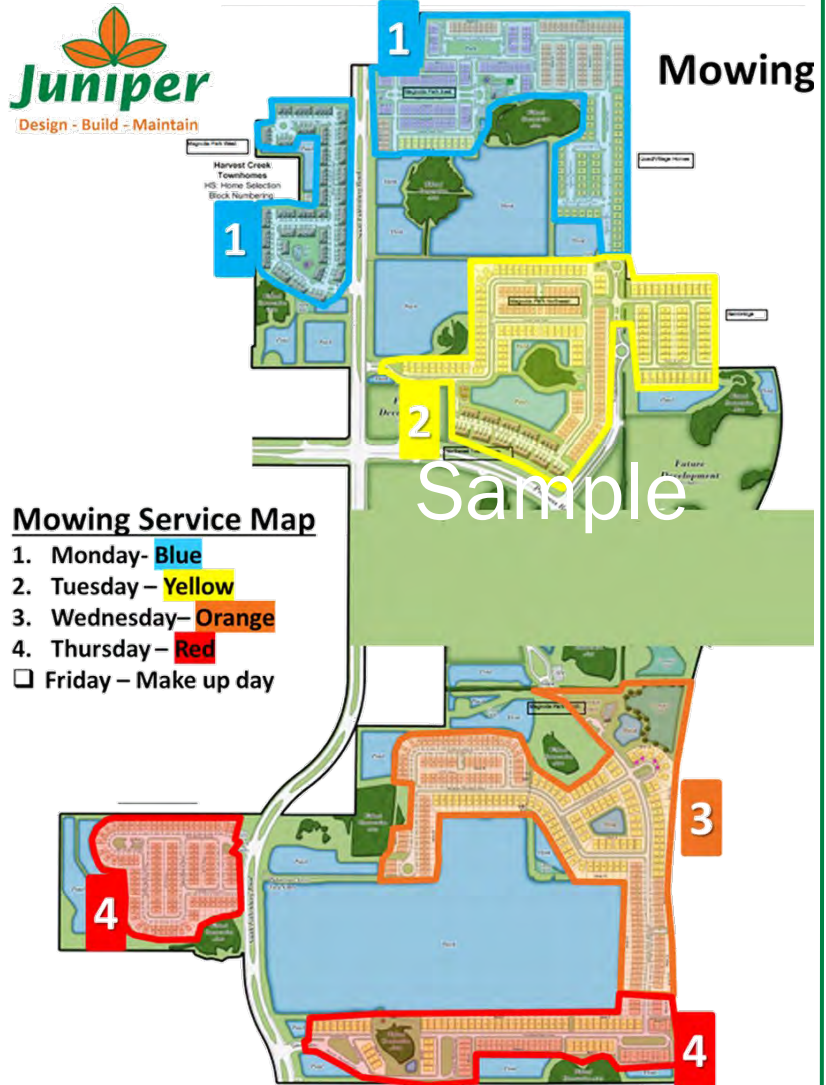
DISEASE CONTROL	DISEASE CONTROL
Brown patch	Leaf spot
Leaf spot	Sooty mold
Dollar spot	Powdery mildew
Other	Root rot
	Other

NOTES: \_\_\_\_\_

TECHNICIAN'S SIGNATURE: \_\_\_\_\_

Regular service schedule maps are created for each community.

### Service Rotation Map



### Irrigation Reports

  
 Design - Build - Maintain

Job Name: \_\_\_\_\_  
 Controller Name: \_\_\_\_\_  
 Date: \_\_\_\_\_ Page # \_\_\_\_\_ of \_\_\_\_\_

Start Times	Seasonal Adjust	Run Days
Program A	%	M T W T F S S
Program B	%	M T W T F S S
Program C	%	M T W T F S S
Program D	%	M T W T F S S

Checked Weather Sensor:  YES  NO  
 Weather Sensor:  Working  Not working

Controller Make & Model	WORKING		NOT WORKING	
	Potable Water	Reclaim Water	Well Water	Lake Water
PDC info:	PRESURICIZED	PUMP START	CENTRIFUGAL	SUBMERGIBLE

Pump Status & Type: \_\_\_\_\_

Information:

Zone Number	Spray, Rotor, MP, Drip, or Bubbler	Run Time [Program]	Run Time [Program]	Battery Pack/Double/Add-a-Zone	Zone Faults or Alarms

Contract/Maintenance [No Charge]:

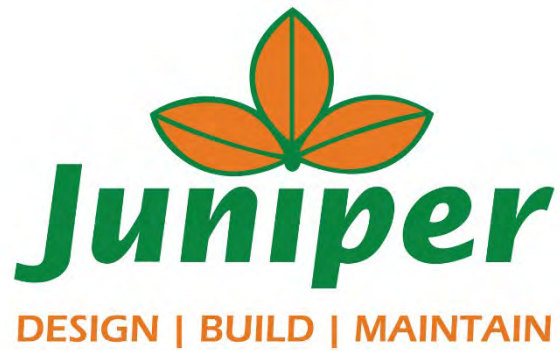
Maintenance Repairs
Clogged Nozzles
Head straightened/adjusted
Billable Repairs or Upgrades:
Head Broken - 6" spray
Head Broken - 12" spray
Head Broken - 6" rotor
Head Broken - 12" rotor
Broken Riser
Upgrade 4" to 6" Pop Up
Upgrade 6" to 12" Pop Up
Nozzle - MPR
Nozzle - MP rotator
Severe Line Clog
Lateral Line Break
Relocation
Head Raised or Lowered-Turf
Head Raised or Lowered-Shrub
Damaged Valve Box
Valve - Inoperative/Sticking
Additional Labor/Troubleshoot
Other-See Comments

Additional Comments: \_\_\_\_\_

Technician Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Did you contact the Account Manager? YES / NO      What time? \_\_\_\_\_      Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO





At Juniper, we understand that each project is unique because no two clients are the same. We bring a straightforward, focused analysis to each property's individual needs.

Our commitment to quality, dependability, and industry-best practices drives us forward. This commitment empowers us to meet our clients' requirements and to serve their expanding needs as our relationship continues to grow.



# START UP: COMMUNICATION



At Juniper, we know an effective communication plan is essential for a smooth start up and the key to delivering superior customer service.

## COMMUNICATION PLAN

Juniper schedules and hosts recurring 30-minute TEAMS meetings (prior to actual startup and ongoing afterward).

### SCHEDULE

- 15-30 days prior to start date – Every other week TEAMS (20-30 Minutes)
- First 45 days after start date – Every Other Week TEAMS (20-30 minutes)

### ATTENDEES

Who is typically included in these meetings?

Juniper

- Account Manager
- Branch Manager
- Other Juniper staff depending on current issues

Your Association (You Choose)

- Property Management
- Interested Key Landscape Committee Members
- Interested Board Members

### PURPOSE

- The intent of the TEAMS meeting is to create and maintain a convenient way for Juniper to provide quick updates, get quality feedback, identify issues, generate ideas, create strong communication and set us all up for success.
- These meetings are in addition to any regularly scheduled walk-thrus or onsite meetings between Manager/BOD and Juniper.

### AGENDA

- Juniper Account Manager & Branch Manager - Operations update
- Manager/BOD – Feedback, requests, suggestions, immediate issues/concerns
- Identify clear next steps

# START UP: FIRST 60 DAYS



## LANDSCAPE MAINTENANCE

### ■ SERVICE REQUEST MEETING

Meet with association management to review and prioritize all open service requests and any outstanding work orders.

### ■ DETAILED PROPERTY REPORT

A detailed report with photos will be submitted to the BOD/Manager to provide insight into the areas that can be improved quickly, as well as those that may take additional work. This thorough report will give a point of reference of where the property was at take over and act as a benchmark for future performance.

### ■ SCHEDULE OF SERVICES MAP

Production team is working on the schedules that will be provided to the HOA.

- Irrigation Wet Check Schedule
- Mowing Schedule
- Shrub Pruning Schedule

### ■ PROPERTY MOWING TECHNIQUES

Uniformed crews begin proper and corrective mowing techniques using daily sharpened and clean blades, mowing at a proper height for the St. Augustine turf areas.

### ■ PROPER PRUNING TECHNIQUES

Uniformed crews begin proper and corrective pruning techniques, using clean, sharp shears and loppers.

### ■ WEED CONTROL

Uniformed crews begin weeding and cleaning of beds, applying herbicides, and correcting bed lines.

### ■ IRRIGATION

Set meeting with management and landscape/irrigation committee to discuss open items along with any concerns, and to set the starting point for the irrigation maintenance check.

# START UP: FIRST 60 DAYS



## FERTILIZATION AND PEST CONTROL

### ■ ADDRESS IMMEDIATE ISSUES

Areas with active pest issues will be addressed *immediately*.

### ■ L&O EVALUATION REPORT

A detailed report which evaluates the property based on the health and vigor of the lawn and landscape will be submitted to the BOD/Manager.

### ■ SOIL TESTING

Collect soil samples from various locations of the property to send to A&L Labs or to the University of Florida for analysis. This data is the basis of how we will tailor the fertilization program going forward.

### ■ CORRECTIVE PLAN

Areas with pest, fungus, or weeds will be documented with pictures and a corrective plan will be put in place. Weed varieties or pest issues that cannot be eliminated due to environmental conditions and/or restrictions will also be documented and brought to the BOD/Property Manager's attention.

- Begin treatment of turf/shrub damaging insects
- Begin treatment of turf/shrub disease
- Begin fertilization of turf areas.
- Begin fertilization of shrub bed areas, trees and palms

## ANNUAL FLOWER DISPLAY

### ■ PLAN TO IMPROVE ANNUAL FLOWER DISPLAYS

- Review soil conditions (soil amendments may be needed).
- Provide options based on season.
- Work with landscape committee to develop plan for the entire year so we can look at contract growing flowers.



# START UP: FIRST 60 DAYS



## INITIAL IRRIGATION INSPECTION

Evaluation of all key elements of the irrigation system with an Initial Irrigation Evaluation Report to be submitted to the BOD/Manager.

Our irrigation team along will inspect all irrigation controllers & review functionality.. We will be looking for faulted communication errors & abnormal milliamp usage which could also cause intermittent communication issues between controllers & valves. Controllers will also be inspected for proper grounding & grounding rods.

## FIELD INSPECTIONS

- Inspect for faulty zones.
- Inspect all wire connections.
- Once functioning, inspect zone for functionality & coverage.
- Check if components are still under manufacture warranty.
- All sprinkler heads will have been cleaned or nozzles replaced and adjusted per contract.
- Any immediate changes made during the evaluation per our contract will be noted and reported.
- Increase runtimes for zones that have been showing signs of drought stress.
- Any major repairs that may be needed will be submitted in the form of a proposal.

## PROGRAMMING & OPTIMIZATION

- Review all run time programming.
- Review system pressure and typical zone GPM.
- Make suggestions for optimization to improve communication & efficiencies.
- Optimize program run times.
- Begin to identify/label the irrigation zones.

**Project Manual for  
Solicitation of Proposals for  
Landscape and Irrigation Maintenance Services**

**Harbour Isles  
Community Development District**

**July 31, 2023**

## **Table of Contents**

1. Instructions to Proposers
2. Official Bid Proposal Form
3. Combined Affidavit for Scrutinized Companies, Public Entity Crimes, E-Verify, and Non-Collusion
4. Exhibit A: Scope of Services
5. Exhibit B: Maintenance Map

## Instructions to Proposers.

1. **General Information.** The Board of Supervisors ("**Board**") of the Harbour Isles Community Development District ("**District**") is soliciting proposals for the provision of Landscape and Irrigation Maintenance Services on a continuing basis ("**Proposals**"). The District is located in Hillsborough County, Florida. The cost of such services is anticipated to be well below any competitive procurement thresholds and requirements. All proposers should be experienced in providing landscaping and irrigation services in the State of Florida and hold any applicable licenses or certifications. Any proposer that is a corporation or other business entity must be registered with the Florida Department of State, Division of Corporations, authorized to do business in the State of Florida, and currently in good standing.
2. **Project Manual.** This Project Manual will be available for purchase **ONLY on Friday, August 4, 2023 from 9am to 4:30pm at 121 Spindle Shell Way, Apollo Beach, FL 33572. An electronic version of the Project Manual will be emailed to each point of contact by 5:30 PM on August 4, 2023 for those whose checks have been received. The Cost of the Project Manual is \$100.00. Checks must be made out to Inframark. NO CASH OR CC ACCEPTED. Failure to purchase the Project Manual as specified herein will preclude the District's consideration of a proposal submitted by the proposer.**
3. **Review of Project Manual:** It is the responsibility of prospective proposers to review the Project Manual and any addenda, made available in connection with the work and to prepare a proposal based solely on the Project Manual.
4. **Scope of Services.** The Landscape and Irrigation Maintenance Services are generally described in the "Scope of Services" attached hereto as **Exhibit A** for the locations highlighted in yellow in the **Maintenance Map** attached hereto as **Exhibit B**, as well as any addenda issued to proposers prior to the submission of Proposals.
5. **Mandatory Pre-Bid Meeting.** There is a mandatory pre-bid meeting on **Monday, August 7, 2023 at 9:00 a.m.** at the Harbour Isles Clubhouse, 121 Spindle Shell Way, Apollo Beach, FL 33572.
  - a. Proposers must thoroughly familiarize themselves with the property and all conditions pertinent to performing the work.
  - b. No additional compensation nor relief from any obligation of the proposed agreement will be granted because of lack of knowledge of the site or conditions under which the work will be performed, i.e., general working conditions, labor requirements, weather conditions, accessibility, condition of the premises, condition of the irrigation system, any obstructions, drainage conditions and the actual grades.
6. **Interpretation and Addenda of Scope of Services.** No verbal interpretations will be made to any proposer as to the meaning of the Scope of Services. Interpretations, if made, will be written in the form of an addendum and sent by District Manager to all invited proposers. **The deadline for submitting questions relative to this project is 2:00 p.m. on Wednesday, August 9, 2023.**
7. **Questions should be Directed to District Manager.** Any questions relating to this solicitation should be directed to the District Manager via email at [angel.montagna@inframark.com](mailto:angel.montagna@inframark.com) . **Answers to questions will be returned on August 11, 2023 by 2:00 p.m. to all proposers who attended the mandatory pre-bid meeting.**



- 8. Submittal Requirements.** Each Proposal shall include the following information:
- a. Official Proposal Form.** This solicitation includes an Official Proposal Form. Such form is to be filled out and executed completely.
  - b. Required Affidavit.** An executed copy of the Combined Affidavit for Scrutinized Companies, Public Entity Crimes, E-Verify, and Non-Collusion included in this solicitation.
  - c. Company Information**
    - i.** Name of company (including any "Doing Business As" names)
    - ii.** Headquarters/parent company locations
    - iii.** Office locations and total number of employees at each
    - iv.** Local address and telephone number
    - v.** History of the company
    - vi.** Organization chart of company
    - vii.** Proof of applicable insurance
  - d. Qualifications and Staffing**
    - i.** Number of CDDs represented by the proposer
    - ii.** Why the proposer is the best qualified to perform the Scope of Services
      - 1.** if there will be a subcontractor performing certain services, describe which services will be subcontracted out and include subcontractor's qualifications
    - iii.** Team the proposer will assign to the District, including the name, title, number of years' service, and relevant educational and work experiences.
  - e. Cost of Additional Services.** A fee proposal and detailed explanation for additional services that may be performed in addition to the items described in the Scope of Services.
  - f. References.** All proposers must submit a list of at least 3 references, including the name of the client entity, the client's website or general location, and the name, email, and number of a contact person.
  - g. Additional Information.** Any other additional information or documents that will assist the Board in evaluating the Proposer pursuant to the Evaluation Criteria.
- 9. Submittal of Proposals.**
- a.** Interested firms should submit an electronic copy of their Proposal (**no hard copies are required**) containing the information and materials described herein to the District Manager at the above email address no later than **4 p.m. on Monday, August 14, 2023.**
  - b.** Proposals will be securely kept and not reviewed until after the submission deadline.
  - c.** The Board reserves the right to review and accept any Proposals submitted late.
- 10. Mandatory Attendance at Board Meeting.** Proposers are required to attend the Board meeting scheduled for **Tuesday, August 22, 2023, at 11:00 a.m.** at the Harbour Isles Clubhouse to answer any Board questions. Proposers should be prepared to make a brief presentation. The Board reserves the right to reschedule the date of the meeting to another date, and if so, will provide appropriate notice.
- 11. Proposal Duration.** The Proposal must be in effect for a minimum of 90 calendar days starting with the day following the submission deadline. During this time, all provisions of the Proposal must be in effect, including prices. **The anticipated start date for this project is October 1, 2023.**
- 12. Proposal Evaluation Criteria.** Each Proposal will be evaluated using the following criteria:
- a.** Responsiveness to each element contained in the Scope of Services and this solicitation
  - b.** Experience of the proposer, their key personnel, including the project manager and field supervisor;

- c. Proposed number of site visits and staffing levels
- d. Character, integrity, reputation of proposer
- e. Availability of equipment necessary for the work
- f. Geographic location of the proposer's headquarters or local office in relation to the District
- g. Past performance of the proposer in other CDDs
- h. Recent, current, and anticipated workloads
- i. Volume of work previously awarded to the proposer
- j. Reasonableness of cost for the total effort
- k. The District reserves the right to consider other factors and the criteria included herein shall constitute the minimum criteria to be considered

**13. Right to Waive Mistakes and Variations.**

- a. Proposals may not be modified after the submission deadline.
- b. Mistakes in arithmetic extension of pricing may be corrected by the Board.
- c. The District reserves the right to waive any minor or non-material discrepancies or technicalities.
- d. The District further reserves the right to request supplementation of any or all Proposals.

**14. Method of Selection, Award, and Right to Reject.**

- a. The Board will evaluate each Proposal pursuant to the evaluation criteria in order to determine which Proposal is in the District's best interest (low price shall not entitle any proposer to be awarded the services).
- b. There is no guarantee that an agreement will be awarded.
- c. The District expressly reserves the right to reject any or all Proposals at any time or until such time as an agreement is fully executed.
- d. If the Board intends on awarding the services to a proposer, it will announce the proposer they desire to engage with at a public meeting. No written notice of the award will be provided unless requested by a proposer.
- e. The selected proposer shall promptly enter into negotiations with the District to finalize any terms or details.
  - i. If the negotiations are unsuccessful, the District may negotiate with the next proposer(s) whose Proposal(s) was determined to be in the District's best interest until such the negotiation(s) is successful.
- f. The District Counsel will finalize the form of the Landscape and Irrigation Maintenance Services Agreement upon the successful negotiation.

**15. No Reimbursement of Preparation Costs.** Proposers will not be reimbursed for any cost associated with responding to this solicitation.

**16. Public Records.** All Proposals are considered public records pursuant to Chapter 119, Florida Statutes.

**17. No Protest of Board Decisions:** By submitting a proposal, proposers acknowledge this is an informal solicitation of proposals for services below bidding thresholds and there is no right to protest any decision by the Board with respect to this solicitation.

**18. Term and Renewal.** The initial term of the agreement will be 1 year. The agreement will automatically renew for subsequent 1-year periods until terminated pursuant to the termination provisions in the agreement. The scope of services and compensation for renewal periods may be adjusted by mutual written agreement evidenced by a written addendum.

## **19. Required Disclosure:**

- a. **License and Permit Requirements:** For the purpose of complying with Florida Statue 218.80 titled "Public Proposal Disclosure Act", except as may be described in the Agreement, the successful proposer shall obtain and pay for all permits and licenses necessary for the work. Proposers shall be responsible for complying with Hillsborough County licensing requirements prior to submitting a Proposal and shall submit proof of compliance. Those Proposers who are not duly licensed and/or do not furnish proof thereof with their Proposal may be deemed non-responsive and may be disqualified.
- b. **Public Entity Crimes:** Proposers should be aware of, and in compliance with, all requirements under Section 287.133, Florida Statutes, on Public Entity Crimes. A representation of compliance will be included in the Agreement.
- c. **Scrutinized Companies:** Proposers should be aware of, and in compliance with, all requirements under Section 287.135, Florida Statutes, on Scrutinized Companies. A representation of compliance will be included in the Agreement.
- d. **E-Verify.** Proposers should be aware of, and in compliance with, all requirements under Section 448.095(2)(c), Florida Statutes, on E-Verification requirements. A representation of compliance will be included in the Agreement.
- e. **Public Records:**
  - i. All Proposals are considered public records pursuant to Chapter 119, Florida Statutes.
  - ii. As further described in the Agreement, in accordance with section 119.0701, Florida Statutes, if awarded the work, the Proposer shall: (a) keep and maintain public records that ordinarily and necessarily would be required by the District in order to perform the service, (b) provide the public with access to public records on the same terms and conditions that the District would provide the records and at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law, (c) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law, and (d) meet all requirements for retaining public records and transfer, at no cost, to the District all public records in possession of the contractor upon termination of the agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the District in a format that is compatible with the information technology systems of the District.
- f. The District, in its sole discretion, may reject any Proposer the District finds to lack, or whose present or former executive employees, officers, directors, stockholders, partners or owners are found by the Board to lack honesty, integrity, or moral responsibility. The discretion of the Board may be exercised based on the disclosure required herein, the Districts own investigation, public records, or any other reliable source of information. The Board may also reject any Proposer failing to make the disclosure required herein. By submitting a Proposal, Proposer recognizes and accepts that the District may reject the Proposal based upon the exercise of its sole discretion and Proposer waives any claim it might have for damages or other relief resulting directly or indirectly from the rejection of their Proposal based on these grounds, including the disclosure of any pertinent information relating to the reasons for rejection of the Proposal.

Thank you for your interest in the District.

**Harbour Isles Community Development District**

**Official Proposal Form for  
Solicitation of Proposals for Landscape and Irrigation Maintenance Services**

Name of Proposer: Juniper Landscaping of Florida, LLC.

In accordance with the solicitation of proposals issued by the Harbour Isles Community Development District the undersigned proposes to provide all work necessary to perform the scope of services as described in the Project Manual.

Proposer submits that it can perform the work described above summarized as follows and as more specifically described in Proposer’s proposal:

1. Turf Maintenance	\$ <u>123,000</u>
2. Shrub and Groundcover Maintenance	\$ <u>27,220</u>
3. Tree Maintenance	\$ <u>13,880</u>
4. General Site Maintenance: Trash and Debris Disposal	\$ <u>3,000</u>
5. Irrigation System	\$ <u>6,000</u>

<b>Total Yearly Cost for the first year of the above items</b>	\$ <u>173,100</u>
<b>Year 2</b>	\$ <u>178,453</u>
<b>Year 3</b>	\$ <u>178,8453</u>
<b>3- Year Grand Total</b>	\$ <u>530,006</u>

6. Mulching for Tree and Shrub/Groundcover Bed Areas \$ 18,480

*Estimate of total cubic yards proposed to service the property:* 350

*Cost of Mulch Per Cubic Yard* \$ 56

*Irrigation Hourly Rate for items not included in the Scope of Services:* \$ 75

Proposer, thoroughly reviewed all components of the Project Manual and has a thorough understanding of the work required, the site and conditions where the work is to be performed, local labor conditions and all laws, regulations and other factors affecting performance of the work, having knowledge of the expense and difficulties attending performance of the work, and having fully inspected the site in all particulars, hereby proposes and agrees, if Proposer’s proposal is accepted, to enter into the Proposed Agreement with the District.

Name of Authorized Signatory of Proposer: Juan Nova

Title of Authorized Signatory of Proposer: Branch Manager

Signature of Authorized Signatory of Proposer: *Juan Nova*



**Affidavit for  
Public Entity Crimes, Scrutinized Companies, E-Verify, and Non-Collusion**

*[Solicitation of Proposals for Landscape and Irrigation Maintenance Services]  
Harbour Isles Community Development District*

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

Name of Proposer: Juniper Landscaping of Florida, LLC.

I am authorized to make this affidavit on behalf of my firm and its owner, directors and officers. I state that:

**Public Entity Crimes**

1. I understand that a “person” or “affiliate” who has been placed on the “convicted vendor list” following a “conviction” for a “public entity crime” (as those terms are defined in Section 287.133, Florida Statutes) for a period of 36 months following the date of being placed on the convicted vendor list, would render us ineligible to submit a proposal for this project.
2. Neither I, nor any person or affiliates with my firm, nor my firm has been placed on the convicted vendor list following a conviction for a public entity crime that would render us ineligible to submit a proposal for this project.

**Scrutinized Companies**

3. I understand that, pursuant to Section 287.135(2)(a), Florida Statutes, we would be ineligible to submit a proposal for this project if we are company that is on the “Scrutinized Companies that Boycott Israel List” (created pursuant to Section 215.4725, Florida Statutes) or are engaged in a boycott of Israel.
4. Neither I nor my firm are on the “Scrutinized Companies that Boycott Israel List” nor are we engaged in a boycott of Israel.

**E-Verify**

5. I understand that, pursuant to Section 448.095(2), Florida Statutes, we must comply with Florida’s E-Verify law in order to enter into an agreement with a public employer.
6. Our firm is registered with and uses the United States Department of Homeland Security’s E-Verify system to verify the work authorization status of all employees hired on or after January 1, 2021.
7. No public employer has terminated a contract with our firm under Section 448.095(2)(c), Florida Statutes, within the year immediately preceding the date of our proposal.
8. Our firm is currently in compliance and will remain in compliance, for the duration of the agreement, with all requirements of Section 448.095(2), Florida Statutes.
9. I understand that, if there is a good faith belief that our firm has knowingly violated Section 448.09(1), Florida Statutes, there is an obligation to terminate the agreement pursuant to Section 448.095(2)(c), Florida Statutes.
10. I understand that, if there is a good faith belief that one of our subcontractor(s) has knowingly violated the Section 448.09(1), Florida Statutes, but our firm has otherwise complied with its obligations thereunder, then our firm will be required to immediately terminate its contract with the subcontractor in order to continue providing services to a public employer.

**Non-Collusion**

11. The price(s) and amount(s) of in our proposal have been arrived at independently and without consultation, communication, or agreement with any other proposer, potential proposer, proposal, or

potential proposal.

- 12. Neither the price(s) nor the amount(s) in our proposal, have been disclosed to any other firm or person who is a proposer or potential proposer, and they will not be disclosed before opening of all proposals.
- 13. No attempt has been made or will be made to induce any firm or persons to refrain from submitting a proposal, or to submit a price(s) higher than the prices in our proposal, or to submit any intentionally high or noncompetitive price(s) or other form of complementary proposal.
- 14. Our proposal is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- 15. Our firm, its affiliates, subsidiaries, officers, director, and employees are not currently under investigation, by any governmental agency and have not in the last 3 years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to any public contract, except as disclosed.

I state that I and the named firm understand and acknowledge that the above representations are material and important, and will be relied on by the Harbour Isles Community Development District for which our proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is, and shall be treated as, fraudulent concealment from the District of the true facts relating to the submission of proposals for this work.

Bonnie C Marshall  
Signature of Authorized Signatory of Proposer

Sworn before me on August 11, 2023

[Handwritten Signature]

Notary Public Signature



Notary Stamp

# **Exhibit A: Landscape Scope of Services**

## 1. TURF MAINTENANCE

### A. Mowing

All turf areas shall be mowed as needed so that no more than one-third (1/3) of the leaf blades are removed per mowing. Mowing shall be with a reel, rotary, or mulching mower, whichever is appropriate for turf species. Mowing speed will be set at manufacturer recommended pace, not at full throttle speed. Mower blades will be sharp at all times to provide a quality cut. Mowing height will be according to grass type and variety. Recommended turf heights after mowing is three-quarter (3/4) inches to one and one-half (1-1/2") inches for Bermuda turf, and three (3") to four (4") inches for St. Augustine Floratam or 'Bitter Blue'. Bahia turf shall be three (3") to three and one-half (3 1/2") inches after mowing. Clippings will be left on the lawn as long as no readily visible clumps remain on the grass surface thirty-six (36) hours after mowing. Otherwise, large clumps of clippings will be collected and removed by the Contractor. In the case of fungal disease outbreaks, clippings will be collected until the disease is controlled. **On CDD turf maintenance areas that abut conservation/wetlands, the contractor is responsible for maintaining a 15 ft. vertical cutback to keep mowing lines accessible as needed. The contractor shall not allow conservation/wetland vegetation to encroach onto mowable areas.**

After each mowing operation, the Contractor shall use a weed-eater or similar machine to trim grass that cannot be mowed with large machinery.

**Frequency:** St. Augustine grass will be mowed 42 times a year. Bahia turf grass will be mowed 36 times a year.

- i. St. Augustine grass will be mowed 42 times a year, weekly April through the end of October and every other week November through the end of March.
- ii. Bahia turf grass will be mowed 36 times a year, weekly May through September and every other week October through April.
- iii. All walkways, porches, parking areas, and curbs will be blown clean of any debris created from service following each mowing.
- iv. Mowing speed will be set at manufacturer recommended pace, not at full throttle speed.

### B. Edging

Contractor shall be responsible for edging all curbs, walkways and turf bed lines with a metal blade edger. All completed edges will have a perpendicular appearance between turf and hard surfaces, and turf and bed lines. An angled or beveled appearance of hard surfaces or bed lines is unacceptable. Weed eaters are not to be used in edging. Tree rings and plant beds and all buildings, sidewalks, fences, walls, driveways, parking courts, and other surfaced areas bordered by turf will be edged at every mowing. Turf around irrigation heads will be trimmed so as to not interfere with or intercept water output. Isolated trees and shrubs growing in lawn areas will require mulched areas around them (three feet minimum diameter) to avoid bark injury from movers and to reduce root competition from



grass. Contractor will clean all clippings from sidewalks, curbs, and roadways immediately after mowing and/or edging. Clippings will not be swept, blown or otherwise disposed of in storm sewer drains. Blowers will be used to clean sidewalks, curbs, and streets of organic material caused by mowing and edging.

**Frequency:** Weekly during growing season and as needed to keep within growing heights during off-season.

- i. All curbs, parking areas and sidewalks will be edged in conjunction with mowing schedule. Planting areas will be edged on a bi-weekly basis in growing season and at least once per month November through March.
- ii. Walls, posts, signs, valve boxes, transformers, utility boxes and other above-ground appurtenances shall be line trimmed in conjunction with mowing schedule even with mowed grass. Line trimming and edging will be accomplished without damaging any trees, shrubs or sprinklers.

### C. **Fertilization/pH Adjustment**

Contractor shall have full responsibilities of determining the proper formulations and rates of all fertilizers to maintain healthy vigorous turf. The Contractor shall take soil samples in at least three turf areas and one landscaped bed throughout the property to determine the pH level and any nutritional deficiency within thirty (30) days of the commencement of the landscape maintenance contract, and then at least once per year in January prior to springtime fertilization. Larger properties or properties with variable soil types may require additional soil samples. Soil samples shall be analyzed by a soil fertility laboratory to evaluate soil conditions for "soil fertility", including but not limited to pH, lime requirement, phosphorus (P), potassium (K), calcium (Ca), magnesium (Mg) and micro-nutrients. The testing laboratory shall be instructed to provide comments for improving soil fertility/pH for the turf crop. The procedure and cost of all soil or other testing analyses shall be the responsibility of the Contractor. Soil testing analysis results and comments shall be submitted to the District within a report comparing the results to prior year's results for comparison purposes.

The pH level should be between 6.5 and 7.0 for optimum growing conditions in turf. Add necessary soil amendments of sulfur to lower the pH or lime to raise the pH according to the soil testing laboratory recommendations.

Contractor shall be expected to apply any minor nutrients necessary to maintain a healthy turf. Turf shall be fertilized **four (4) times** per year in February, May, August, and November. Fertilizers shall be granular in composition and contain 30% to 50% of the nitrogen in slow or controlled release form. Fertilizer shall also contain magnesium and micro-nutrients (i.e. manganese, iron, zinc, copper, etc.). The amount of each nutrient to be applied to the turf at each frequency is to be determined by the recommendations of the soil testing laboratory.

Fertilizer will be swept off of walks and drives onto lawns and landscape beds. After fertilization, a minimum of one-fourth (1/4) inch of water will be applied by the Contractor.

**Frequency:** minimum of four times a year with additional applications as required based on field conditions or recommendation from soil fertility laboratory.

**D. Fire Ant Control**

During each maintenance visit, the Contractor shall monitor and treat ant mounds and nesting yellow jackets or other stinging insects throughout the property as required using a granular or drench method. Fire Ant mounds are to be removed and soil mounds leveled to previous grade after Fire Ants have been killed. The Contractor shall remove and dispose of wasps, bees and other subterranean insects in plant materials, on the ground or on site structures/furnishings.

**Frequency:** As needed

**E. Insect and Disease Control**

Contractor shall be responsible for inspections of the entire property and treatment of any insect or disease related problems during each maintenance visit. Turf areas destroyed by insects and/or fungus shall be repaired with sod at Contractor's expense. The Contractor will inspect lawn areas at each visit for indication of pest problems. Upon confirmation of a specific problem requiring treatment, pesticides will be applied as needed on a spot treatment basis using the least toxic, effective pesticide. All spraying of pesticides will be performed when temperatures are below those recommended by the manufacturer and wind drift is negligible. Records shall be kept on locations where pests were identified and treatment(s) rendered for control.

All pesticides, insecticides, fertilizers, and any other products must be used in strict compliance with label and instructions. Applications must comply with all state and federal regulations. The specifications are intended to be consistent with current label instructions. In the event the specifications conflict with instructions on the pesticide label, the label instructions shall govern. MSDS (Manufacturer's Safety Data Sheets) signs shall be placed in visible locations prior to spray applications.

**Frequency:** As needed

**F. Turf Weed Control**

All turf is to be maintained to control and strive to eliminate weeds. The program will include pre-emergent, post emergent, and physical (hand pulling) weed control methods. Contractor shall provide to the District a report on the existing turf condition within thirty (30) days of beginning the maintenance contract. The report will assess the amount of weeds in the turf and provide a management plan to remove the weed species found. The management plan shall include a level of acceptable weed growth and a schedule of herbicide treatment required to reach the level of acceptable weed growth.

**Frequency:** As needed

**G. Water**

Contractor shall be responsible for monitoring the moisture levels in turf areas and reporting any problems, in writing, that may be present during the maintenance visit. Contractor shall be responsible for damage to items that were not reported to the District in writing and will be responsible for replacement of these items.

Contractor shall not be responsible for the hand watering of any turf area unless plant material is under additional warranty.

**Frequency:** As needed

## **H. Retention/Detention Ponds and Pond Banks**

Bahia turf areas are to be mowed at a height of three to three- and one-half inches. Contractor shall notify the District of erosion along pond banks and provide written proposals for the repair of erosion.

**Frequency:** Bahia turf grass will be mowed 36 times a year, weekly May through September and every other week October through April.

## **2. SHRUB AND GROUND COVER MAINTENANCE**

### **A. Pruning**

All shrubs shall be hand pruned to remove dead and/or damaged wood to allow for natural development of plant material, and to create the effect intended by the District. Shrubs designated by the District to be shaped as a hedge will be pruned with mechanical or hand shears as needed to provide an informal shape, fullness, and bloom. Trim shrubs and hedges as necessary to maintain all appropriate safety indexes and to keep them looking neat and level as directed by the District. Pruning shall not create vertical sides to plants. Lower branches of shrubs shall be allowed contact with enough sun light for healthy growth. All branches, dead wood, cuttings shall be removed from the job site as the time of pruning and disposed at an approved brush site. All shrub areas damaged by pruning equipment shall be restored. Ground cover plants may need some cutting back to encourage lateral growth. The work area shall be left neat and clean after all trimming and pruning operations. All clippings and debris from pruning will be carted away at the time pruning takes place.

#### **Pruning shall include the following items:**

- i. Dead dying or unsightly parts of trees/shrub/ground cover
- ii. Sprouts growing at or near the base of a tree trunk
- iii. Branches that grow toward the center of the tree trunk
- iv. Crossed branches that may rub together
- v. Nuisance growth that interfere with view, traffic and signage. Nuisance growth includes the removal of all dangerous thorns spikes or appendages which may have potential conflict with people
- vi. Removal of browned foliage on ornamental grasses in early Spring

Deep hand pruning and/or structure pruning should be performed once a year during the dormant months. Structure pruning shall be defined as using hand pruners, hand saws, and/or loppers to prune

old wood and prune behind multiple breaks to maintain proper proportions, promote interior growth, and an aesthetically pleasing appearance. Removal of up to 20% of the height and foliage of plants shall take place during these pruning tasks, which will occur no more than once per year and only as required.

**Frequency:** Monthly

**B. Fertilization/ pH Adjustment**

Contractor shall have full responsibilities of determining the proper formulations and rates of all fertilizers to maintain healthy vigorous shrubs. Soil fertility shall be checked once per year as described in Section 1-C above. Contractor shall be expected to apply any minor nutrients necessary to maintain healthy shrubs. Nutrient deficiencies shall be treated with supplemental application of the specific lacking nutrient according to soil testing laboratory recommendations.

**Frequency:** Once yearly for testing – applications as required by soil testing laboratory recommendations

**C. Insect and Disease Control**

Contractor shall be responsible for weekly inspections of the entire property and treatment of any insect or disease related problems. The Contractor shall practice Integrated Pest Management (I.P.M.) to control insects, diseases, and weeds on and around perennials, ground covers, shrubs, vines and trees. This will include monitoring at each scheduled maintenance visit and spot treatment as necessary using the least toxic methods. All spraying will be performed when temperatures are within the recommended range of the product to be applied and when wind drift is negligible. First choice will be insecticidal soaps, horticultural oils and biological controls such as *Bacillus thuringiensis* (Bt) formulations. To eradicate more serious infestations by chewing or sucking insects, leaf miners and other pests, spray affected plants with special sprays and combinations of insecticide sprays suitable for the particular insect when the infection becomes evident and as often thereafter as necessary. Contractor shall be fully licensed to spray insecticides.

All pesticides, insecticides, fertilizers, and any other products must be used in strict compliance with label and instructions. Applications must comply with all state and federal regulations. The specifications are intended to be consistent with current label instructions. In the event the specifications conflict with instructions on the pesticide label, the label instructions shall govern. MSDS (Manufacturer's Safety Data Sheets) signs shall be placed in visible locations prior to spray applications.

**Frequency:** As needed

**D. Water**

Contractor shall be responsible for monitoring the moisture levels in shrub and groundcover beds and reporting any problems, in writing, that may be present during the maintenance visit. Contractor shall be responsible for damage to items that were not reported to the District in writing and will be responsible for replacement of these items.



Contractor shall not be responsible for the hand watering of any plants unless plant material is under additional warranty.

**Frequency:** As needed

**E. Bed Weed Control**

Weeds shall be controlled in bed areas by physical (hand pulling) and chemical methods. Bed areas shall be maintained to control weeds and strive to eliminate weeds. All shrub bed areas shall be maintained each mowing service by removing all weeds, trash and other undesirable material and debris to keep the area neat and tidy.

**Frequency:** As needed

**3. TREE MAINTENANCE**

**A. Tree Pruning**

Tree will be done once per year or as requested by the District. Prune, thin and trim trees as required to keep the trees healthy, to maintain the natural character of the variety, to control their shape and to maintain all appropriate safety indexes. Pruning in general shall consist of the removal of dead, broken, fungus infected, insect infected, and intertwining branches, vines and all other undesirable growth. Care shall be taken when pruning trees in landscape beds to create as little damage as possible to the plant materials below. Contractor shall be responsible for maintaining all trees such that no branches/limbs will overhang on sidewalks and parking areas lower than eight feet from the ground. Lower branching on all trees shall be pruned as needed, to keep them elevated to a uniform height. Trees located in natural areas shall be pruned only when their growth habit affects formal, maintenance areas. Limbs and branches are to be removed from property. All sucker growth from trunk and base of trees shall be removed weekly or as required to maintain a clean appearance. This includes the following areas, fishing piers, bridges and sheds. This is to include maintaining at all times a minimum of six to fifteen (6-15) feet of clearance under all limbs depending on location and species of tree. All clippings and debris from pruning will be carted away at the time pruning takes place.

Regardless of height, the Contractor shall be responsible for overall pruning of all ornamental trees such as Wax Myrtles, Crape Myrtles, American Hollies, Nellie R. Stevens Hollies, Ligustrums, East Palatka Hollies, Dahoon Hollies, Silver Buttonwoods, Treeform Oleanders, Sea Grapes, and other ornamental or flowering trees. Pruning will include the shaping of all heads, removal of conflicting branches and removal of interior sucker growth.

Cuts should be made with sharp and proper tools. When cutting parts of branches, leave a living bud at the end of the stub. Make cuts sufficiently close to parent stem, but leaving a one-half (1/2") inch to a one (1") inch nub, so that healing can readily start under normal conditions. On trees known to be diseased, disinfect tools with alcohol after each cut and between trees.

Dead tree removal is not the responsibility of the Contractor. Removal of dead limbs larger than six (6") inches in diameter is not the responsibility of the Contractor. Contractor is responsible to notify the District of dead trees and limbs that require removal by others.

### **Palm Pruning:**

Palm pruning will be done weekly with smaller palms (less than 15' in overall height) and two times per year for larger palms and is limited to dead and /or brown fronds and seed pods. No green fronds will be removed. Palms should not be severely pruned. The practice of leaving the old fronds as skirts on these Palms is not acceptable. Contractor shall never climb Palms with spikes or any other equipment that can damage trunks of trees.

**Frequency:** As needed for smaller palms and 2 times/year for larger palms.

- i. *Ornamental Plants:* Will be pruned as needed to maintain a one (1) foot clearance from all building sides and other structures. A two (2) foot clearance from all roof eaves, and to always maintain a neat uniform appearance.
- ii. Trees will be pruned once a year.
- iii. *Palms:* Palm pruning will be done weekly with smaller palms (less than 15' in OA height) and two times per year for larger palms and is limited to dead and /or brown fronds and seed pods.
- iv. *Hardwood Trees:* All tree branches will be kept pruned from ground up to fifteen (15) feet for proper walking clearance at all times.

### **B. Fertilization**

Existing mature trees do not apply. Fertilization applies to planted trees that have a caliper of ten (10") inches or less. Contractor is required to notify the District and make recommendations, in writing, of all other trees that may need supplemental fertilization. Fertilizer used on site should have labels attached.

Palms are to be fertilized three times per year using fertilizers especially formulated for Palms. Palm fertilizer shall be broadcast under foliage canopy at the rate of one (1) pound per inch of palm trunk diameter. Fertilizer shall not be placed against the trunk. Palm fertilizer shall be time release granular fertilizer formulated for palms "Palm Tree Fertilizer or Palm Special". A good balance fertilizer shall have 10% (Nitrogen), 5% (Phosphorous), 5% (Soluble Potash) and the necessary secondary (trace) plant foods such as Magnesium, water-soluble Magnesium, Manganese, Zinc, Boron, Copper and Iron. Palms shall be closely monitored for any sign of nutritional deficiency, especially concerning the following elements: nitrogen, potassium, magnesium, manganese, and iron, and for any sign of rot, smut, or spotting.

### **Frequency:**

- i. *Turfgrass Fertilization:* St. Augustine Turfgrass areas will be fertilized (4) times per year. Treatments will include a high-quality fertilizer and/or a micronutrient/iron supplement. Fertilizer rates are adjusted according to turf health, maturity, and desired growth patterns.
- ii. *Bahia Fertilization:* Bahia grass will be fertilized (2) times per year.
- iii. *Shrub Fertilization:* Shrubs will be fertilized (2) times per year. Treatments will include a high-quality fertilizer and/or a micronutrient/iron supplement. Fertilizer rates are adjusted according to shrub health, maturity, and desired growth patterns.

- iv. *Palm Fertilization:* Palms will be fertilized (2) times per year. Treatments will include a high-quality fertilizer and/or a micronutrient/iron supplement. Fertilizer rates are adjusted according to palm health, maturity, and desired growth patterns.
- v. *St. Augustine Turfgrass and Ornamental Pest Control Treatments:* During each treatment the St. Augustine turf and ornamentals will be inspected for damaging insects, active diseases and weeds. Treatments will be applied according to current industry standards, applicable laws and restrictions.

### C. **Insect and Disease Control**

Contractor shall be responsible for weekly inspections of the entire property and treatment of any insect or disease related problems. Insect and disease problems found in existing mature trees is not the responsibility of the Contractor but reporting those problems to the District is required.

Routinely check palms for signs of distress or disease in the trunks, buds, or fronds. Any evidence of disease affecting the palms is to be reported to the District at once. With District authorization, the Contractor shall plan for proper evaluation and treatment of the problem. Inspect all palms, especially the Phoenix varieties during the month of March, for infestation of Palmetto Weevil.

The Contractor shall monitor those palms which are susceptible to Ganoderma butt rot. Should this disease be found on any palm, the Client shall be notified in writing, including a location map of the palm, whereby appropriate action on a case-by-case basis shall be directed by the District. Every precaution will be made to contain the disease and keep it from spreading to other palms. Proper care and procedures with equipment and maintenance around Ganoderma infected palms will be followed in accordance with University of Florida Cooperative Extension Service recommendations.

All pesticides, insecticides, fertilizers, and any other products must be used in strict compliance with label and instructions. Applications must comply with all state and federal regulations. The specifications are intended to be consistent with current label instructions. In the event the specifications conflict with instructions on the pesticide label, the label instructions shall govern. MSDS (Manufacturer's Safety Data Sheets) signs shall be placed in visible locations prior to spray applications.

**Frequency:** As needed

### D. **Water**

Contractor shall be responsible for monitoring the moisture levels in bed areas and reporting any problems in writing that may be present during the maintenance visit. Contractor shall be responsible for damage to trees that were not reported to the District in writing and will be responsible for replacement of these items.

**Frequency:** As needed

### E. **Staking**

Staked trees shall be re-staked and adjusted as often as necessary. Stakes shall be adjusted and/or removed when deemed appropriate by Contractor. However, trees that need to be re-staked utilizing specialized equipment and crews shall be done at a mutually agreed upon price, submitted in writing to the District for review and approval.

**Frequency:** As needed

#### **4. GENERAL SITE MAINTENANCE: TRASH AND DEBRIS DISPOSAL**

##### **A. Cleanup Procedures**

As a part of each weekly maintenance visit, a general cleanup program will occur. The cleanup program shall involve a policing of all maintained areas for the removal of paper, cans, bottles, sticks, cigarette butts, leaves, and other debris. A complete sweeping or blowing, by mechanical means, of the entire roadways, curbs, gutters, drains, and sidewalk areas will also be performed. This will encompass complete removal of weeds at curbs and pavement lines, and other trash that has settled in these areas. Parking lot areas will be kept clean within 15 feet of curbs and planted areas. All debris shall be disposed of off-site.

**Frequency:** Weekly

##### **B. Doggie Stations**

All Doggie Stations shall have the trash removed and trash bags checked and replaced twice a week. On-site staff of vendor will replace the dog waste bags, contractor will be responsible for supplying the trash receptacle bags and disposing off-site. (Mondays/Fridays)

##### **C. Weed Control**

All parking lot areas, curb and gutters, driveways, volleyball courts, kiddies playground, pool deck sidewalks and roadways shall be maintained to control and strive to eliminate weeds. All tree rings and ornamental plant beds will be continuously controlled of weeds and grass encroachment.

**Frequency:** As needed

##### **D. Leaf Collection**

The frequency of leaf removal will vary based on the maturity and species of trees on the property. On a monthly basis, the Contractor will collect leaves from focal areas, pavement, and turf areas to prevent heavy build-up and cause damage to plant material by smothering. Additional frequencies may be required for heavy seasonal leaf drop from deciduous trees. Fallen leaves shall be collected and disposed of off-site; however, if the District agrees to dispersal of the leaves within natural areas within the property leaves may be directed to these designated areas.

**Frequency:** As needed

##### **E. Typical Weather Event Cleanup**



Contractor shall be responsible for debris cleanup deposited by typical weather conditions.

**Frequency:** As needed

**F. Dead Shrub Removal**

Dead plant material, not requiring general arborist practices for removal shall be removed and disposed of immediately by the Contractor. Contractor shall contact and advise the District, in writing, of possible replacements. Plant replacement necessitated by negligence of the Contractor shall be the sole responsibility of the Contractor.

**Frequency:** As needed

**G. Retention/Detention Ponds and Pond Banks**

Access paths/easements to the ponds are to be kept clear of foliage and debris. Pond banks shall be kept clear of all debris along the water's edge and within three feet of the water's edge. Removal of floating debris is not the responsibility of the Contractor. Removal of aquatic weeds is not the responsibility of the Contractor.

**Frequency:** As needed

**H. Site Manager**

A site manager/foreman shall be assigned to the community with whom the District Representative may communicate and perform field visits on a regular basis. The Contractor will be responsible for providing bi-weekly reports that will include a detailed account of the tasks performed, condition of the site and any recommendations.

**5. IRRIGATION SYSTEM**

**A. Irrigation Management**

Contractor agrees to monitor, adjust and manage all automatic irrigation systems **(58 zones and 6 battery operated timers)** as to proper frequency, duration, and operation of supplemental watering. Contractor shall be responsible for performing minor adjustments and services such as: flow control, radius adjustment, nozzle cleaning, sprinkler height, and level adjustment. Contractor will notify the District of malfunction or damage to the system's integrity. Routine irrigation maintenance is to be completed monthly.

**Minor irrigation repairs, 2 inches and under, which shall include the replacement of any irrigation PVC pipe, nozzle, head or rotor that is inoperable due to normal use of the irrigation system will be performed by the Contractor and shall be included in the Bid Price.** Should it be determined that damage is cause of negligence by the District, the District shall pay the cost of such repair. In case of major irrigation system mal-function Contractor shall promptly inform the District of the damage and provide a proposal for repairing the system.

Contractor shall be responsible for performing a complete irrigation evaluation at Commencement of the Agreement or as needed. Contractor shall be required to furnish the District with a report of the overall operational quality of the irrigation system. Contractor shall furnish recommendations for repair and improvements to the systems with an itemized cost for proposed work. Irrigation clocks shall have each zone identified within thirty (30) days of Commencement of the Agreement with a station number, general description of the area to be watered and suggested run time of each zone. The Contractor shall also attach waterproof zone tags to the top of zone valves with zone numbers that correspond to the numbering system at the control clock.

Shrubs, groundcovers, and turf around sprinkler heads shall be trimmed to maintain maximum clearance at all times for greatest coverage.

The on-site Property Manager shall be notified what day and time of the week the irrigation tech will be available servicing the community.

**Frequency:** Monthly

## 6. MULCHING FOR TREE AND SHRUB/GROUNDCOVER BED AREAS

### A. Pine Bark Mulch

Applications of 'Mini-Nuggets' Pine Bark mulch will occur at the District's approval. Mulch is to be spread at a depth of two (2") inches such that none of the old or previously laid mulch is visible. Contractor is responsible for accurate measurement of all bed areas and tree circles as part of the bid process.

Contractor is responsible for spot mulching of any bare soil areas that have resulted due to landscape maintenance performance i.e., mower damage around bed lines, tree wells, etc. Spot mulching of beds shall be completed with matching mulch types that are existing on site.

Can be installed upon request at a cost negotiated at time of request. **The District reserves the right to subcontract out the mulch application. This cost will not be included in the monthly landscape service invoice and be invoiced separately.**

**Frequency:** As requested by the District

### B. Trenching

Bed line edges shall be trenched and beveled at a depth of three inches along bed areas that are bordered by sidewalks, curbs, and seasonal color bed areas. A three-inch deep trench is not required along turf bed lines. All tree wells located in turf areas should have root balls raked smooth, removing all old water rings or excessive soil, etc., making all tree wells as uniform in size and shape as possible. Tree well root ball rings within turf areas are to be made uniform in diameter to be consistent with similar varieties.

**Frequency:** As needed when mulching is approved by the District

# **Exhibit B: Maintenance Map**









August 11, 2023

Harbour Isle CDD

RE: Harbour Isle CDD

Dear Board of Directors,

Juniper Landscaping of Florida, LLC is pleased to submit our proposal for the landscape maintenance and irrigation maintenance services of Harbour Isle CDD.

Juniper Landscaping currently maintains multiple CDD's just like Harbour Isle CDD and is very familiar with the property procedures and protocols. Since managing these properties, I am confident you will find that we have made improvements and built relationships with those CDD's. We feel confident we can make the same improvements at Harbour Isle CDD if given the opportunity.

Jarrett Myers, Juan Nova, and Delfino Agustin, have all worked for National and/or Regional landscape firms and in their role, personally managed large CDD's similar to Harbour Isle CDD. Our collective experience spans over 50 years of professional landscape maintenance and construction management. More importantly, we have the passion and determination to grow our firm on a foundation of quality workmanship our client's demand.

Our approach to managing Harbour Isle CDD is based on the demands as the project manual describes. We feel the most effective approach is to have a team led by both a Branch Manager and Account Manager who will collaborate and coordinate the workflow of a team of 11 staff members. The Account Manager and staff will report to the community weekly. If the weather causes a delay in performing our duties, we will complete our task the following business day if necessary. In addition to the overseeing Branch Manager, the team will include the following:

- (1) Account Manager who will:
  - Assist the Branch Manager in managing the crews, ensuring they are meeting schedule.
  - Provide daily porter services to all amenity areas, community entrances, and nature trail.
  - Care for any special maintenance request.
  - Provide follow-up treatments to turf and ornamental weed, insect, and disease pressures.
  - Provide Weekly Reports



- (10) Landscape Maintenance Professionals who will:
  - Be divided into (2) teams. The crew breakdown consists of one (4) man detail team and one (6) man mow team.
  - Each team will be led by a Team Supervisor who will manage experienced Crew Members.
  - The detail team will come to the property once each week to detail a determined section that the community will obtain a map of. This map will show the community exactly which areas our team will be working on weekly.
  - The mow Team of (6) will complete the entire mowing in one day.
- Fertilization and Pest Control of turf, trees, and shrubs will be performed by our trained professional staff of (3) pest control operators under the Supervision of Certified Pest Control Operators license-holders, Kristeen Dobson.
- Irrigation inspections and repairs will be performed by (1) trained professional irrigation technician. An additional (1) part-time Irrigation Specialist will be available as needed for diagnosing and troubleshooting. Diagnosing and troubleshooting will be performed. The irrigation team will create zone maps for reporting and efficiency.

Availability of Equipment – Juniper Landscaping supports its team members by purchasing all equipment necessary for the job. Harbour Isle CDD will require large mowers for pond, medium size mowers for common areas and smaller mowers for tight spots and on small berms around club house to prevent ruts. Juniper also has many supporting branches in the area to work together to create raving clients.

- Juniper has available support branches close to Harbour Isle CDD such as:
  - Lithia
  - Lakeland
  - Bradenton

Thank you again for allowing Juniper Landscaping the opportunity to submit our proposal for the landscape maintenance and irrigation maintenance services at Harbour Isle CDD. We urge you to call on our references to hear the difference our service has made. We look forward to working with you and are confident in our approach and the services we provide. If given the opportunity, we will make you proud that you chose the team of Juniper Landscaping to manage your communities' landscape.

Sincerely,

*Juan Nova*

Juan Nova



---

Branch Manager  
Juniper Landscaping of Florida, LLC

# STAFFING & EXPERIENCE

## Management and Supervisory Personnel

Name	Years Exp.	Position/Certifications	Duties and Responsibilities
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____

## Proposed Staffing Levels

Landscape Maintenance staff will include \_\_\_\_\_ laborers, \_\_\_\_\_ supervisors, and \_\_\_\_\_ technical personnel. In addition, list any personnel with technical expertise that will be utilized on this project. (Such as pesticide, herbicide application, arborists or horticulturist, etc.)

Name	Years Exp.	Position/Certifications	Duties and Responsibilities
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____



Juniper Landscaping of Florida, LLC **CORPORATE OFFICERS**

Company Name \_\_\_\_\_ Date \_\_\_\_\_

NAME FOR PROPOSER	POSITION OR TITLE	CORPORATE RESPONSIBILITIES	INDIVIDUAL'S RESIDENCE CITY, STATE

# TAMPA BRANCH CONTACTS

**Jarrett Myers**

**Regional Director**     [jarrett.myers@juniperlandscaping.com](mailto:jarrett.myers@juniperlandscaping.com)

**813-469-8716**

**Juan Nova**

**Branch Manager**     [juan.nova@juniperlandscaping.com](mailto:juan.nova@juniperlandscaping.com)

**813-450-5922**

**Bonnie Marshall**

**Maintenance CRM**     [bonnie.marshall@juniperlandscaping.com](mailto:bonnie.marshall@juniperlandscaping.com)

**352-316-0264**

**Delfino Agustin**

**Account Manager**     [delfino.agustin@juniperlandscaping.com](mailto:delfino.agustin@juniperlandscaping.com)

**407-773-2010**

**Kristeen Dobson**

**Agronomy Manager**     [kristeen.dobson@juniperlandscaping.com](mailto:kristeen.dobson@juniperlandscaping.com)

**863-220-4419**

**Todd Ruggles**

**Irrigation Manager**     [todd.ruggles@juniperlandscaping.com](mailto:todd.ruggles@juniperlandscaping.com)

**239-980-7857**

**Imara Iglesias**

**Branch Administrator**     [imara.inglesias@juniperlandscaping.com](mailto:imara.inglesias@juniperlandscaping.com)

**239-980-0602**

**Karen Hipolit**

**AR**     [Karen@juniperlandscaping.com](mailto:Karen@juniperlandscaping.com)

**239-561-5980**

# REFERENCES

1. Project Name/Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Project Type/Description: \_\_\_\_\_  
Dollar Amount of Contract: \_\_\_\_\_  
Your Company's Detailed Scope of Services for Project: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Duration of Contract: START DATE: \_\_\_\_\_ END DATE \_\_\_\_\_

2. Project Name/Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Project Type/Description: \_\_\_\_\_  
Dollar Amount of Contract: \_\_\_\_\_  
Your Company's Detailed Scope of Services for Project: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Duration of Contract: START DATE: \_\_\_\_\_ END DATE \_\_\_\_\_

3. Project Name/Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Project Type/Description: \_\_\_\_\_  
Dollar Amount of Contract: \_\_\_\_\_  
Your Company's Detailed Scope of Services for Project: \_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_  
Duration of Contract: START DATE: \_\_\_\_\_ END DATE \_\_\_\_\_

4. Project Name/Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Project Type/Description: \_\_\_\_\_  
Dollar Amount of Contract: \_\_\_\_\_  
Your Company's Detailed Scope of Services for Project: \_\_\_\_\_  
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\_\_\_\_\_  
Duration of Contract: START DATE: \_\_\_\_\_ END DATE \_\_\_\_\_

5. Project Name/Location: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Project Type/Description: \_\_\_\_\_  
Dollar Amount of Contract: \_\_\_\_\_  
Your Company's Detailed Scope of Services for Project: \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Duration of Contract: START DATE: \_\_\_\_\_ END DATE \_\_\_\_\_





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

6/29/2023

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

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

<b>PRODUCER</b> Brown & Brown of FL, Inc. - Fort Myers 6611 Orion Drive Suite 201 Fort Myers FL 33912	<b>CONTACT NAME:</b> Lorie Frost <b>PHONE (A/C. No. Ext):</b> 12392780278 <b>E-MAIL ADDRESS:</b> lorie.frost@bbrown.com		<b>FAX (A/C. No):</b> 239-278-5306	
	<b>INSURER(S) AFFORDING COVERAGE</b>			
<b>INSURED</b> Juniper Landscaping of Florida, LLC Including all Subsidiaries 4415 Metro Parkway Suite 300 Fort Myers FL 33916	JUNIP-1	INSURER A :	Pennsylvania Manufacturers' Association Insurance	12262
		INSURER B :	Great American Insurance Company	16691
		INSURER C :	Accredited Specialty Insurance Company	16835
		INSURER D :	Gemini Insurance Company	10833
		INSURER E :	Capitol Specialty Insurance Corporation	10328
		INSURER F :	Transverse Specialty Insurance Company	

**COVERAGES**

CERTIFICATE NUMBER: 1707165703

REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
F	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			TSAHGL000031-00	7/1/2023	7/1/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000 MED EXP (Any one person) \$ Excluded PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY <input checked="" type="checkbox"/> Personal Inj			1522751093921	7/1/2023	7/1/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Personal Injury Prot \$ 10,000
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			TUE316176404	7/1/2023	7/1/2024	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	2022751093921	7/1/2023	7/1/2024	<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D C E	Professional Cyber Pollution			VPPL016981 2CIAFL17S011250200 EV2018460705	1/1/2023 7/3/2023 1/1/2023	1/1/2024 7/3/2024 1/1/2024	Professional \$ 1,000,000 Cyber \$ 5,000,000 Pollution \$ 100000/\$3000000

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

Additional Named insureds;  
 Juniper Group Acquisition LLC, Juniper Landscaping Holdings, LLC, Juniper Landscaping of Florida, LLC, Juniper of Bradenton, LLC, Coast to Coast Landscaping, LLC, Prestige Property Maintenance Inc., Juniper Landscape Services, LLC, Yohes Lawncare and Landscaping, Battista Farms  
 Pesticide/Herbicide liability is included in the Pollution Liability

**CERTIFICATE HOLDER****CANCELLATION**

Sample Certificate for Bid Purposes Only  
 Final Certificate must be issued by  
 Brown & Brown

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

# CUSTOMER CARE

## ON-SITE MANAGEMENT

People make the difference. We understand that for many residents, speaking in person with a manager is preferable. For this reason, a manager always accompanies Juniper crews & is available on-site for communication & problem-solving.

## 24/7 EMERGENCY SERVICES

When the unforeseen happens, we will be there when you need us. Call our dedicated number for 24/7 support.

## IN-HOUSE CUSTOMER CARE TEAM

We believe that providing great customer service is key providing the best in landscape services. To that end we create department dedicated to supporting residents, account managers & field teams.

To assist owners with maintenance and irrigation concerns, Juniper offers homeowners multiple options:

### Option 1:

Visit [www.junipercares.com](http://www.junipercares.com) and click on "Community Service Request." Create a ticket by following the simple prompts.

### Option 2:

Email [customerservice@juniperlandscaping.com](mailto:customerservice@juniperlandscaping.com), noting the concern.

### Option 3:

Call Customer Service at (239) 561-5980 to speak with a representative.



## JUNIPER SYNC WORK ORDER SYSTEM

Utilize our online work order system to create & track work orders for your property. Managers & residents can easily create an account to use immediately.

### Highlights

- Live Dashboard/ Ticket Summary
- Ticket Aging
- Custom Filters
- Detailed Reporting
- Community Maps
- Knowledge Base
- Give a Gold Star

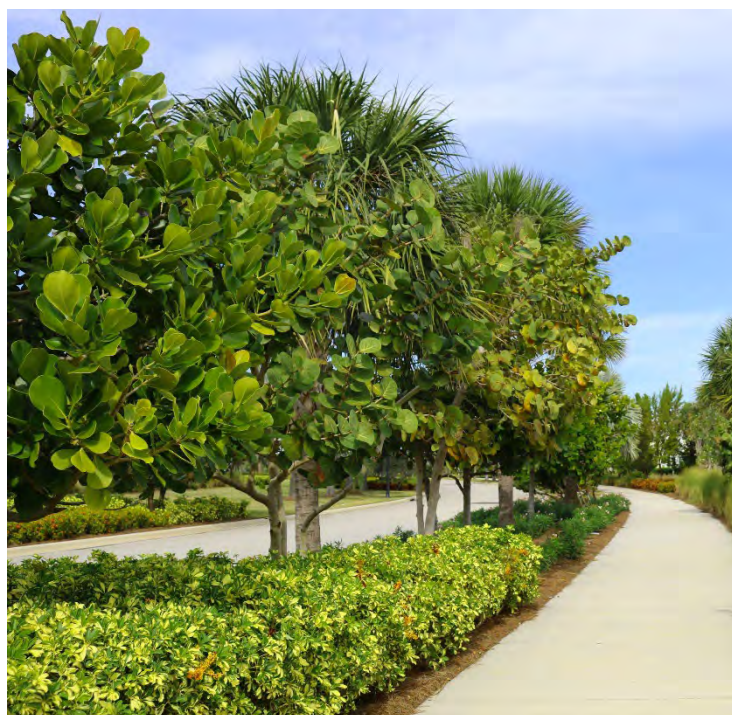




# LANDSCAPE MAINTENANCE

JUNIPER HAS BEEN EXCEEDING INDUSTRY STANDARDS IN THE AREA OF QUALITY AND DEPENDABILITY IN FLORIDA SINCE 2001

Our landscape maintenance teams work closely with the irrigation and horticultural teams. This, combined with regular inspections from our dedicated account managers, helps ensure the job quality our clients have come to expect.





# LANDSCAPE INSTALLATION

## OUR DESIGN & INSTALLATION TEAMS MAKE AN AWARD-WINNING COMBINATION!

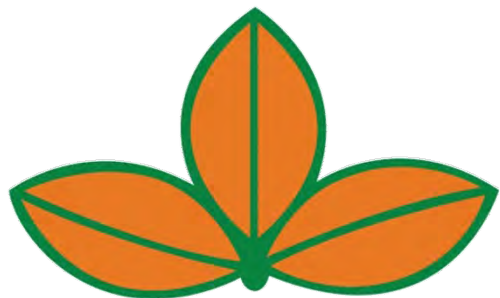
Our teams work hard to deliver a quality project on time and on budget.

- Landscape Design Firm of the Year
- Merit Award Design Residential
- Best Landscape Design Custom Home
- Award Best Landscape Design





# LANDSCAPE IRRIGATION



## STATE LICENSED IRRIGATION CONTRACTOR

### What is a certified irrigation specialty contractor's license?

An irrigation specialty contractor's license is a certified (state-wide) specialty license developed by the Construction Industry Licensing Board to permit contractors to install, maintain, repair, alter, extend, manage, monitor, audit, or, if not prohibited by law, design irrigation systems.

## WATER MANAGEMENT

Our industry experts can help guide you on the most effective way to use your water resources.

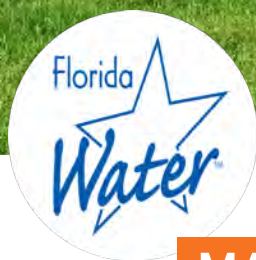
- Central control management
- Converting beds to drip irrigation
- E/T weather-based controllers
- Soil moisture sensors
- Pressure regulated components
- High efficiency sprinklers





# LANDSCAPE IRRIGATION

Juniper's certified technicians perform monthly inspections of irrigation systems to ensure optimum operation and coverage for plant material and turf areas. Concerns are promptly documented on a service form and turned in to the property manager for authorization.



## MAINTENANCE

- Water Management
- Repairs
- Water Monitoring
- Reporting
- Wet Checks



## INSTALLATION

- Infrastructure
- Pump Stations
- Central Control
- Residential
- Commercial





# LANDSCAPE HORTICULTURE



Our training program equips technicians and foreman to apply fertilizer as well as identify and correct plant material problems. Our management team and technicians have specialized training and GI-BMP Certifications from the University of Florida Extension Office, enabling us to be more proactive.

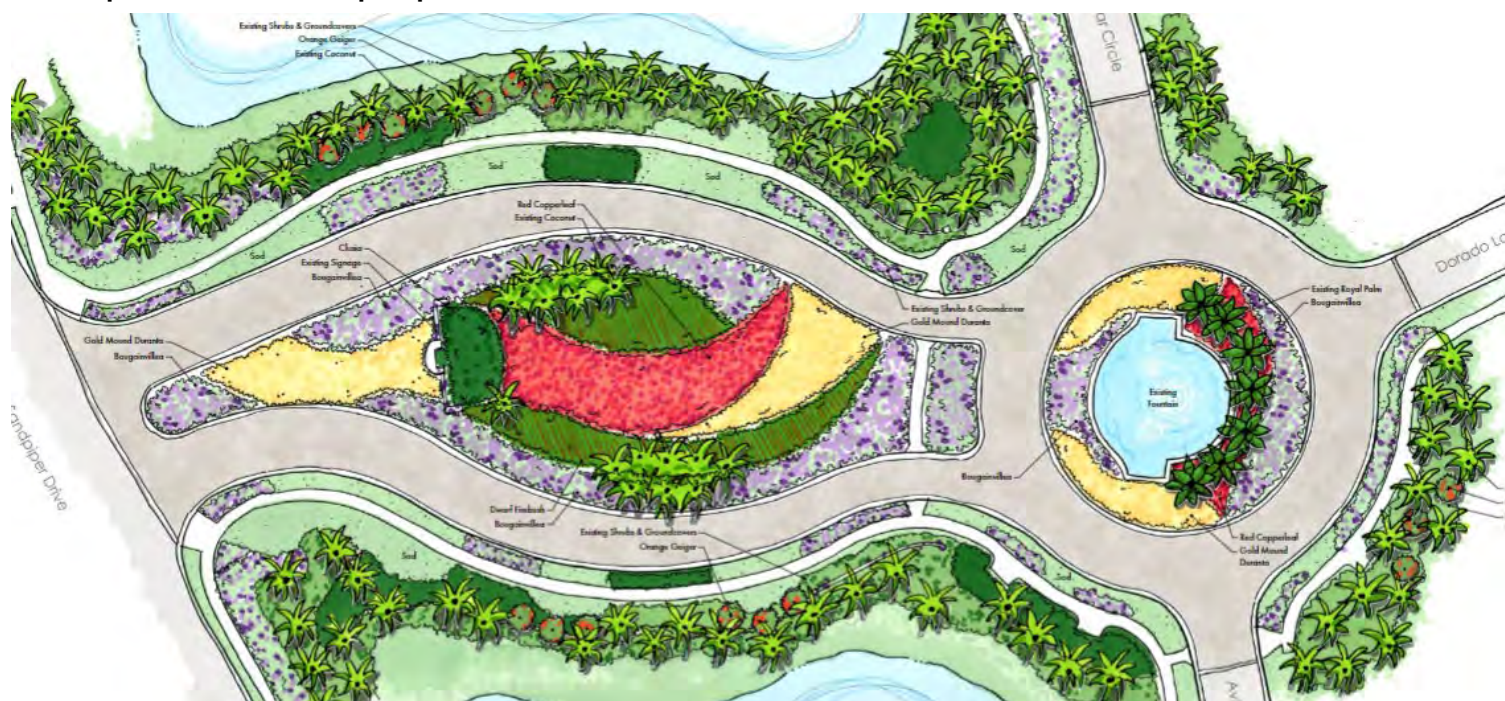




# LANDSCAPE ARCHITECTURE

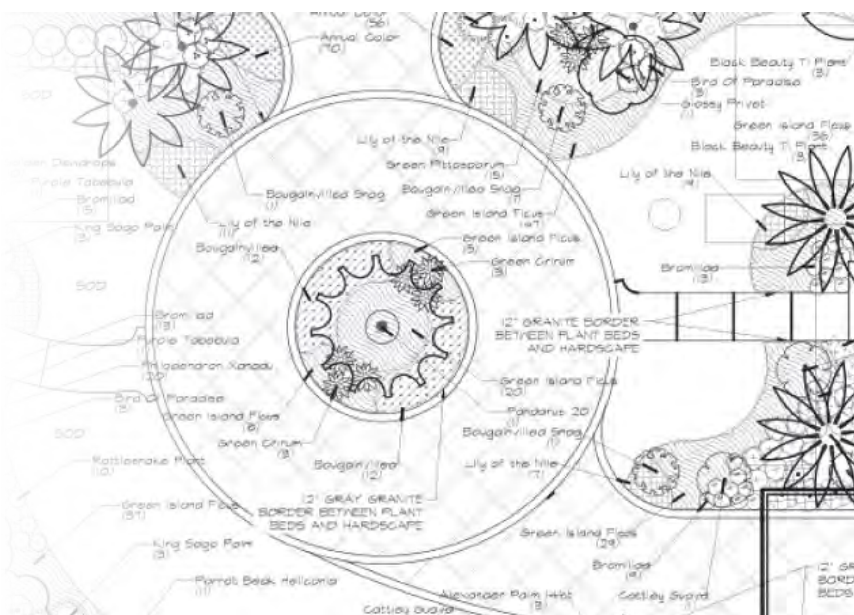
## COMPLETE LANDSCAPE ARCHITECTURE & DESIGN SERVICES

Our design team can help boards with master plans for communities. Providing design hardscape features, 3D renderings of landscape plans, and complete landscape plans.



### JUNIPER DESIGN TEAM

- Licensed Landscape Architects
- Certified Landscape Designers
- Certified Irrigation Designers
- ISA Certified Arborists
- In-house Agronomist
- State of Florida Irrigation License
- Certified Hunter IMMS Installer
- Certified Rain Bird IQ Installer





# NURSERY & TREE FARM

**We know it because  
we grow it!**



With our over 200 acres of nursery & tree farms we can deliver custom, quality plant material to fit the individual needs of our clients. Additionally, our dedicated plant buyer travels throughout the state in search of the best plant material.

By keeping our finger on the pulse of the plant market, we can maximize value for each client.





# SEASONAL COLOR

We create custom schedules for our communities on the annual color program. Our annual flower beds are designed and installed to emphasize color, profusion, and display in high profile areas.

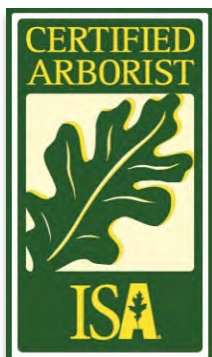
## SEASONAL FLOWER PROGRAM

- Contract grown flowers
- Custom designed displays
- Scheduled installation
- Fresh look all year
- Best in quality annuals
- Enhanced landscape areas
- Additional fertilization keeps flowers looking great





# ARBORICULTURE



JUNIPER has multiple ISA certified Arborists that are available for everything you may need for your tree health care. Preventive maintenance helps keep trees in good health while reducing any insect, disease, or site problems.

## WHY HIRE AN ARBORIST?

Arborists specialize in the care of individual trees. They are knowledgeable about the needs of trees and are trained and equipped to provide proper care. Hiring an arborist is a decision that should not be taken lightly. Proper tree care is an investment that can lead to substantial returns. Well cared-for trees are attractive and can add considerable value to your property.





# STORM RESPONSE

## RESOURCES WHEN YOU NEED THEM MOST!

In preparation for and after a storm, Juniper has additional team members that are critical resources during storm events. They provide not only added manpower but bring with them the trucks and heavy equipment needed to handle storm clean up.



## COMPANY RESOURCES

- 1,800+ team members statewide
- 17 locations throughout Florida
- 10,000+ gallons of onsite fuel
- 300+ trucks in our fleet
- ISA Certified Arborists
- Landscape Designers & Architects
- Teams throughout Florida
- Extensive supply of heavy equipment





# SPORTS TURF

## COMPLETE SPORTS TURF MAINTENANCE

Gone are the days of playing ball in a dirt lot. Today, residents in communities expect playing fields and parks to be safe for their families. You want to work with a company who has industry experience & advanced knowledge in sports turf.

### SERVICES

- Agronomic Services
- Agronomic Consulting
- Topdressing
- Fertilization Programs
- Pest & Disease Management
- Weed Management
- Cultivation Services
- Aerification
- Slicing
- Fraze Mowing
- Deep-Tine Soil Reliever
- Verticutting & Vacuum





# EDUCATIONAL CLASSES

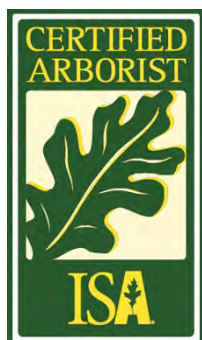
## PRESENTATIONS & CEUS AVAILABLE FOR CLASSROOM OR ONLINE LEARNING

At Juniper Landscaping we offer CEU courses that cover a variety of subjects that include irrigation, palm tree care, turf care, and tree selection.

### CURRENT COURSES

- IRRIGATION 101
- HORTICULTURE 101
- TREE SELECTION
- PEST ID LAWN & ORNAMENTAL
- PLANTING PRINCIPLES & PLANT ID
- DIAGNOSING LANDSCAPE ISSUES

Our Green Industry experts' courses are designed to assist managers to make the best decisions to maximize their property's beauty and ease of maintenance.





# AWARD WINNING LANDSCAPES

## EXCEEDING INDUSTRY STANDARDS!



### PINNACLE AWARDS

- Best Landscape Design Custom Home
- Award Best Landscape Design
- Merit Award Design Residential
- Landscape Design Firm of the Year

### AURORA AWARDS

- Landscape Design/Pool Design
- Best Custom home for “La Castille”

### SAND DOLLAR AWARDS

- Best Community Feature of the Year
- Best Landscape Design 30-50k
- Best Landscape Design under 30k
- Best Landscape Design over 50k

### SUMMIT AWARDS

- Best Contracting Landscape 5-8 million+
- Merit Award for Infrastructure & Landscape



# SAFETY & TRAINING



We hold the safety of our clients & our team members in the highest regard. We have implemented a company wide safety program that is administered through our safety coordinator & local branch managers.

## Initial Hire Program

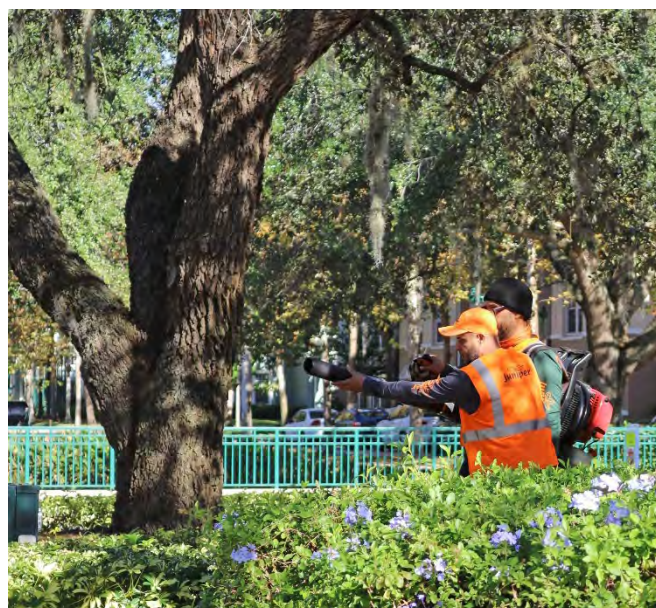
- Safety rules
- New hire safety orientation
- Required & use of PPE

## Safety Training Program

- Equipment certifications
- Weekly safety meetings
- Daily jobsite reviews
- Traffic control systems
- Best practices training
- Safety rewards/swag based on safety performance
- Online training tools



SCAN QR CODE TO WATCH VIDEO HIGHLIGHTS OF OUR IN-HOUSE TRAINING PROGRAM





# CERTIFICATIONS & LICENSES

## OUR QUALIFIED TEAM

At Juniper, many of our team members hold valuable certifications and licenses. Their years of experience, along with additional training, enables them to provide our customers with answers they can trust.

### CERTIFICATIONS & LICENSES

- Licensed Landscape Architects
- Certified Landscape Designers
- Certified Irrigation Designers
- Certified Pest Control Operators
- FNGLA Certified Horticultural Professional
- FNGLA Certified Landscape Contractor
- ISA Certified Arborist
- State of Florida Irrigation License
- Certified Hunter IMMS Installer
- Certified Rain Bird IQ Installer
- Best Management Practices (BMPs)





# CERTIFICATIONS & LICENSES

**The International Society of Arboriculture**  
 Hereby Announces That  
*Wesley L. Maks*  
 Has Earned the Credential  
**ISA Certified Arborist®**

By successfully meeting ISA Certified Arborist certification requirements through demonstrated attainment of relevant competencies as supported by the ISA Credentialing Council

*Catlyn Tulligan*  
 Catlyn Tulligan  
 CEO & Executive Director

6 April 2019	30 June 2023	MI-0524-A
Issue Date	Expiration Date	Credential Number





The Florida Nursery, Growers & Landscape Association  
*Confers on*

**Nicholas Salerno H69 09432**

*The Title of*  
**FNGLA Certified Horticulture Professional (FCHP)**

Expiration Date: 6/30/2019  
 Certified Since: 6/20/2013

*Robert Shotton*, FNGLA President  
*Merry Mott*, FNGLA Certification Director

State of  Florida

Department of Agriculture and Consumer Services  
 Bureau of Licensing and Enforcement

**CERTIFIED PEST CONTROL OPERATOR**  
 Number: JF319874  
**CHRISTOPHER CARL RICHARDS**

*This is to Certify that the individual named above is a Certified Pest Control Operator and is privileged to practice Lawn and Ornamental*

*in conformity with an Act of the Legislature of the State of Florida regulating the practice of Pest Control and imposing penalties for violations.*

*In Testimony Whereof, Witness this signature at Tallahassee, Florida on December 15, 2021*

*Nicole Fried*  
 NICOLE "NIKKI" FRIED  
 Commissioner of Agriculture

*Paul Eitz*  
 Chief Bureau of Licensing and Enforcement

11/24/2021 10:18:04 AM



**North Carolina State University**  
**Agricultural Institute**

On the recommendation of the Faculty and by virtue of the authority vested in them, the Trustees of the University have conferred upon

**Kyle James Leverette**  
 the degree of  
**Associate of Applied Science**  
**in Turfgrass Management**

In testimony whereof, the seal of the University and the signatures of its officers are herewith affixed this the fifteenth day of May, two thousand four.

*Mary Anne Foy*, Registrar  
*Kenneth L. Edsall*, Associate Dean and Director of Academic Programs  
*Johnny C. Wilson*, Business Dean of the College of Agriculture and Life Sciences  
*John C. Arnold*, Assistant Director of Academic Programs and Director of the Agricultural Institute





The Florida Nursery, Growers & Landscape Association  
*Confers on*

**Kyle Leverette H62 12112**

*The Title of*  
**FNGLA Certified Horticulture Professional (FCHP)**

Expiration Date: 6/30/2022  
 Certified Since: 5/24/2019

*Ed Basso*, FNGLA President  
*Merry Mott*, FNGLA Certification Director

Ron DeSantis, Governor  
 Halsey Beshears, Secretary

STATE OF FLORIDA  
 DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION


CONSTRUCTION INDUSTRY LICENSING BOARD

THE IRRIGATION SPECIALTY CONTRACTOR HEREIN IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

**STANLEY, DARRELL EUGENE**  
 JUNIPER LANDSCAPING OF FLORIDA, LLC  
 5880 STALEY RD  
 FORT MYERS FL 33905

LICENSE NUMBER: SCC131152351  
 EXPIRATION DATE: AUGUST 31, 2022  
 Always verify licenses online at MyFloridaLicense.com

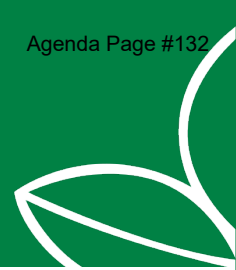
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# MEET THE TEAM

## MATT DEAN



### ENHANCEMENT MANAGER

Matt Dean has been in the green industry for over 17 years, getting his start on the grounds crew of a golf course while still in high school. In order to further his career, he attended the outstanding agricultural program at Florida Southern College where he received a Bachelor's Degree in Turfgrass Management. After graduating, he continued maintaining the beautiful greens of golf courses from Lakeland to Sun City Center.

Matt transitioned into landscape maintenance for HOAs as an Account Manager and eventually developed an interest in the landscape installation side of the business. He has managed enhancement and renovation projects from \$1,000 to over \$1 million. He finds great satisfaction bringing drawings on paper to life and seeing the finished product of a stunning landscaping.

### HIGHLIGHTS

- Florida Southern College
  - Bachelor's Degree in Turfgrass Management
  - Minor in Business Administration
- Florida Waterwise Certified
- 9 Years Golf Course Management
- 9 Years Landscape Management

### LAKELAND

3545 Waterfield Rd  
Lakeland, FL 33803

### QUALIFICATIONS



# MEET THE TEAM

## KRISTEEN DOBSON



### AGRONOMY MANAGER

Kristeen Dobson has over 7 years' experience in the green industry and got her start managing a small nursery. There she started as a Pest Control Technician and worked her way up to Agronomy Manager.

By conducting her own studies and research at the nursery, Kristeen gained a wealth of knowledge about plant materials and the issues they contract. She provides clients with customized plans on how to treat lawns and ornamentals correctly. Her goal is to never stop leaning so she can continue to look after turf and plants the best way possible.

Kristeen currently manages a team of over 10 dedicated Pest Control Technicians at Juniper and is passionate about passing on her knowledge to them. She strives to treat her team well, so they work hard, love their jobs, and achieve their best potential.

### HIGHLIGHTS

- FNGLA Certified Horticultural Professional
- Best Management Practices Certified
- LTD Commercial Fertilizer Applicator

### LAKELAND

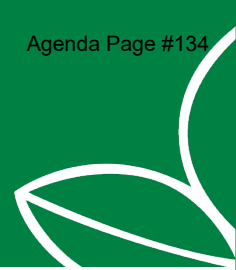
3545 Waterfield Rd  
Lakeland, FL 33803

### QUALIFICATIONS



# MEET THE TEAM

## BONNIE MARSHALL



### CLIENT RELATIONS MANAGER

Bonnie Marshall has been involved in many aspects of the green industry over the past 15 years, including operations, sales, finance, HR, insurance, and more. As a St Petersburg, native, she has spent her entire life living in Florida and feels a strong connection to the area.

Bonnie graduated with honors from the University of South Florida and had the privilege of being part of Wedgworth, an agricultural leadership program. This 2-year program starts out locally, then expands to national & international locations, during which Bonnie traveled to Hong Kong, Vietnam, and China.

Bonnie is skilled at managing relationships and offering insights and advice to ensure success at every company she has worked with. During her time with a national tree company, she negotiated the largest commercial landscape sale in company history.

Bonnie is involved with many organizations and has served on their various boards and committees throughout her career. These include, but are not limited to, International Society of Arboriculture (ISA), Florida Nursery, Growers and Landscape Association (FNGLA), Central Florida Hotel and Lodging Association (CFHLA), Community Associations Institute (CAI), Building Owners and Managers Association (BOMA), and Roots Plus Growers Association (RPG).

### HIGHLIGHTS

- University of South Florida
  - Bachelor of Science in Finance, Cum Laude
- University of Florida
  - Leadership Program Graduate
- The George Washington University
  - Master's Certificate in Project Management

### TAMPA

7104 E 9th Ave  
Tampa, FL 33619

### QUALIFICATIONS



# MEET THE TEAM

## JARRETT MYERS



### REGIONAL MANAGER

Jarrett Myers has been in the green industry for 25 years. For 14 years he owned his own full-service landscaping company where he gained valuable insights on problem solving in difficult situations. He has a degree in Computer Aided Drafting and is a Certified Pest Control Operator in the state of Florida.

Managing large-scale communities, such as Fish Hawk Ranch and Celebration, is what Jarrett loves to do. He coordinates a plan for each client to ensure they have what they need for a successful transition and maintenance solution. He takes pride in challenging his team to always look for ways to improve and preparing them for a wonderful career in the landscape industry. Jarrett finds great satisfaction in helping team members to become leaders themselves.

### HIGHLIGHTS

- Associates Degree in Computer Aided Drafting
- Certified Pest Control Operator
- Best Management Practices Certified
- 25 Years Green Industry Experience

### LAKELAND

3545 Waterfield Rd  
Lakeland, FL 33803



# MEET THE TEAM

## MARK MICHALEK



### DIRECTOR OF MAINTENANCE ESTIMATING

Mark Michalek moved to Florida with his family at a young age from Pittsburg, PA and has never looked back. He attended the University of Central Florida on an academic scholarship and obtained a Bachelor of Business Administration degree. He had nearly 10 years of experience in community association management, before transitioning to the green industry, and is a licensed CAM. Additionally, he sat on the Trade Show Committee for the Community Associations Institute of Central Florida for 7 years.

In his capacity as a CAM, Mark worked closely with many HOA boards. He specifically provided his expertise on their landscape maintenance contracts and negotiations. This background gave Mark an extensive knowledge of a community's needs and he utilizes this information to give invaluable insight to the sales and maintenance teams at Juniper.

Mark spends his free time in sports related activities such as bowling, football and racing.

### HIGHLIGHTS

- University of Central Florida
  - Bachelor of Business Administration
- Licensed Community Association Manager
- Community Associations Institute of Central Florida (CAICF) Chair for 7 Years

### WEST ORLANDO

4000 Avalon Rd  
Winter Garden, FL 34787

### QUALIFICATIONS

# LEADERSHIP TEAM



**Brandon Duke**  
Chief Operating Officer

Brandon grew up in the landscape industry and joined Juniper in 2008 after graduating with a Bachelor's of Business Management from Liberty University.

Creating an innovative environment has always been his passion and his creative nature has transformed the way Juniper does business. Brandon added design services to the Juniper repertoire because of his drive to provide Juniper clients the most diverse product offering. He oversees day-to-day operations and is heavily involved in sales and under his leadership, Juniper has experienced year-over-year growth. He has ushered in a new generation of Juniper talent and changed the way we do business today.

Brandon's designs have been recognized by nationwide landscape magazines and he has received numerous awards in the construction industry.



**Dan deMont**  
Chief Revenue Officer

Dan joined the Juniper team in 2011 after a five-year relationship with Juniper as one of their primary vendors. As a Regional Sales Manager for one of the biggest landscape industry suppliers in the United States, Dan managed 14 branches, sold over \$20 million a year, and learned the business from a different perspective.

Dan introduced the idea that Juniper could grow their business with team structure, team goals, and the "one stop shop" mentality while maintaining the small family business feel it was built on. Dan is an experienced landscape and irrigation professional with numerous certifications and has earned multiple awards for landscape design and construction.

He attended both Edison College and UMass Boston and has a degree in business management. Dan is a past vice president of the Florida Irrigation Society SW FL Chapter and is very active in the community, participating in various charities.



**Robert Oulahan**  
Chief Financial Officer

Robert spent the majority of his over 25-year career serving middle market companies in financial leadership positions. His experience includes time with "Big 4" accounting firms, Nasdaq listed companies and strong growth focused entities. He has helped guide these businesses by implementing various financial and tax solutions that were in line with the company's strategies and core values. He has specialized in service industry and construction companies during his career in the public and private sector.

Robert graduated Rutgers University as a Magna Cum Laude. After college he successfully obtained his CPA certification.



# CLIENT REFERENCES



**Jonathan Pentecost**  
Division President  
SW FL

“Since 2005, Juniper Landscaping has provided quality material and workmanship for thousands of homes built for DR Horton and our brands in Southwest Florida. I have found not only their prices to be competitive, but they are highly skilled operators with excellent execution in their business from first negotiation to last install and warranty.”

**Rhonda Brewer**  
V.P. Community  
Development

“Juniper is a full service landscape, irrigation, and maintenance company with exceptional customer service and quality. They have the expertise and attention to detail which make working with them a pleasure and our projects a success. I would highly recommend Juniper for any landscape or irrigation project.”

**Mike Lewis**  
V.P. Purchasing,  
Design &  
Architecture

“Juniper Landscaping is truly a full service operation. From incredible landscape designs by the team at Botanics Design Group to top quality material and installation services to best in class maintenance operations keeping the landscaping looking beautiful long after the initial install, Juniper does it all with some of the best people in the business.”

**John R. Peshkin**  
Managing Principle

“Juniper is a first-class organization focused on customer satisfaction. The turn-key services they provide us from preliminary design and budgeting to construction and long-term maintenance have helped streamline our land development efforts. Juniper provides excellent quality work and is a trusted and valued trade partner.”

**Bob Koenig**  
Vice President

“Juniper has successfully completed a diverse range of projects for our company such as an addition to a high end resort hotel, a custom home whose owners wanted their landscaping to make a statement, institutional work, a streetscape project on 47th Terrace in Cape Coral and code minimum projects for warehouses and manufacturing. Throughout each of these projects Juniper Landscaping has been able work effectively with our team on site to meet the demands of the budget and the schedule required for each project while providing a quality project. I highly recommend Juniper.”

# JUNIPER CARES



Making our communities better places to live and work is important, not only for our clients and employees, but for all our neighbors in the area. With that in mind, we support many local charitable organizations across the state and use environmentally sound practices.



# Juniper

CARES 





# JUNIPER CARES



The Industry COLLECTIVE is a movement of landscapers, lawn care companies, and suppliers who are unified in their efforts to impact their local communities.



Imagine an entire industry coming together, to serve and to give, for the sole purpose of creating a positive impact locally and around the world. This is Industry Collective.

Industry Collective has designed practical, on-site community service events to minimize headache and maximize IMPACT. This makes it easier than ever to build team morale while serving the needs of communities everywhere.





# PORTFOLIO: TAMPA



## MAGNOLIA PARK





# PORTFOLIO: TAMPA



## FISH HAWK TRAILS





# PORTFOLIO: LAKELAND



## FISHHAWK RANCH





# PORTFOLIO: LAKELAND



BEXLEY



ADDITIONAL INFO



# PORTFOLIO: ST. CLOUD



## TWIN LAKES





# PORTFOLIO: CELEBRATION



## CELEBRATION CDD





# PORTFOLIO: WINTER GARDEN



## LAKEVIEW POINTE





# PORTFOLIO: OCALA



## WORLD EQUESTRIAN CENTER





# PORTFOLIO: CUSTOM DESIGN



## CONNORS RESIDENCE





# PORTFOLIO: CUSTOM DESIGN



## THE BOATHOUSE





# PORTFOLIO: CUSTOM DESIGN



## KOOP RESIDENCE



ADDITIONAL INFO



# DESIGN SAMPLES



BEFORE

## COMPUTER RENDERINGS



AFTER

ADDITIONAL INFO







**LANDSCAPE MAINTENANCE SERVICES**

**FOR**



**121 Spindle Shell Way  
Apollo Beach, FL 33572**

**PREPARED BY:**



**5532 AULD LANE  
HOLIDAY, FL 34690  
1.888.RED.TREE**

**SUBMITTED BY:  
DAVID LUCADANO, PRESIDENT / OWNER**

**August 14 , 2023**





# 1.888.RED.TREE

[www.redtreelandscape.com](http://www.redtreelandscape.com)

[service@redtreelandscape.com](mailto:service@redtreelandscape.com)

***The New Standard in  
Landscape Maintenance***



Our state-of-the-art equipment fleet arrives at your property ready to perform any and all grounds maintenance tasks.



Experienced irrigation technicians perform diagnostics, repairs, and outdoor lighting service calls whenever you need them!



A team of Certified Arborists and expert tree climbers are available to prepare your trees for hurricane season or to help you clean up fallen trees after the storm.

We also offer Pest Control & Fertilization services to keep your property green, blooming, and free of weeds. Our team of Certified Pest Control Operators know the right products to keep your lawn & ornamentals free of pests.



## ***Contact Us!***

David Lucadano 727-919-3913

Peter Lucadano 727-919-3915

***Owners with over 30 years of experience in the Florida Green Industry!***

[@redtreelandscape.com](https://www.facebook.com/redtreelandscape.com)





[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

## Detail by Entity Name

Florida Limited Liability Company  
 REDTREE LANDSCAPE SYSTEMS LLC

### Filing Information

**Document Number** L17000248407  
**FEI/EIN Number** 82-3591450  
**Date Filed** 12/05/2017  
**State** FL  
**Status** ACTIVE

### Principal Address

5532 AULD LANE  
 HOLIDAY, FL 34690

Changed: 02/04/2019

### Mailing Address

5532 AULD LANE  
 HOLIDAY, FL 34690

Changed: 02/04/2019

### Registered Agent Name & Address

LUCADANO, PETER  
 5532 AULD LANE  
 HOLIDAY, FL 34690

Address Changed: 02/07/2019

### Authorized Person(s) Detail

#### **Name & Address**

Title CEO

LUCADANO, PETER  
 5532 AULD LANE  
 HOLIDAY, FL 34690

### Annual Reports

Report Year	Filed Date
2021	02/22/2021
2022	01/26/2022
2023	02/15/2023

**Document Images**

<a href="#">02/15/2023 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">01/26/2022 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">02/22/2021 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">01/15/2020 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">02/07/2019 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">01/08/2018 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">12/05/2017 -- Florida Limited Liability</a>	View image in PDF format





## ***Harbour Isles Community Development District***

### **COMPANY HISTORY**

David and Peter Lucadano (owners of RedTree Landscape Systems) have served Florida's Green Industry for over forty years respectively. Formerly known as "The Luke Brothers," David and Peter built one of the largest landscape contracting firms in the United States (*Luke Brothers Landscape Services* was rated one of the America's Top 100 Largest Landscape Firms by *Lawn & Landscape Magazine*). After building their *Luke Brothers Landscape Services*, the brothers received a lucrative offer to sell their company to a national firm.

Due to their credentials and experience in the industry, David and Peter have operated as industry consultants for the past several years after selling their landscape company. However, their deep love of the Green Industry and their ability to lead led them to resume their partnership and create *RedTree Landscape Systems* several years ago. *RedTree Landscape Systems* continues the long legacy of serving the Tampa Bay Area Green Industry by providing the "best of the best" employees who worked for the brothers for many years. By implementing the systems that were proven to be successful and effective on large-scale community association properties, the *RedTree Landscape Systems* team has successfully built a strong clientele and a stellar local reputation for performance.



*The New Standard in Landscape Maintenance*

**HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT  
QUALIFICATION OF BIDDER**

**ADDRESS: 5532 AULD LANE  
HOLIDAY FL 34690**

**TELEPHONE NUMBER: (727) 919-3913**

**EMAIL: [peteluke@redtreelandscape.systems](mailto:peteluke@redtreelandscape.systems)**

**NUMBER OF EMPLOYEES: 150**

**FEIN: 82-3591450**

**PASCO COUNTY OCCUPATIONAL LICENSE NUMBER AND DATE OF EXPIRATION: 105879  
Expires September 30, 2023**

**RESTRICTED PESTICIDE LICENSE STATUS:**

- **PETER LUCADANO – LTD COMMERCIAL FERTILIZER APPLICATOR – LF 203707 EXPIRES APRIL 22, 2025**
- **DAVID LUCDANO – CPCO – JF118508 EXPIRES JUNE 1, 2024**

**BANKING REFERENCE: WELLS FARGO  
6013 STATE ROAD 54  
NEW PORT RICHEY FL 34653  
(727) 843-4300**

**CREDIT REFERENCES:**

- **FORD MOTOR CREDIT: 1 (800) 727-7000**
- **JOHN DEER FINANCING: (844) 724-7376**
- **AMPLEX NURSERIES: 1 (800) 565-2928**



**Affidavit for  
Public Entity Crimes, Scrutinized Companies, E-Verify, and Non-Collusion**

*[Solicitation of Proposals for Landscape and Irrigation Maintenance Services]  
Harbour Isles Community Development District*

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

Name of Proposer: RedTree Landscape Systems, LLC

I am authorized to make this affidavit on behalf of my firm and its owner, directors and officers. I state that:

**Public Entity Crimes**

1. I understand that a “person” or “affiliate” who has been placed on the “convicted vendor list” following a “conviction” for a “public entity crime” (as those terms are defined in Section 287.133, Florida Statutes) for a period of 36 months following the date of being placed on the convicted vendor list, would render us ineligible to submit a proposal for this project.
2. Neither I, nor any person or affiliates with my firm, nor my firm has been placed on the convicted vendor list following a conviction for a public entity crime that would render us ineligible to submit a proposal for this project.

**Scrutinized Companies**

3. I understand that, pursuant to Section 287.135(2)(a), Florida Statutes, we would be ineligible to submit a proposal for this project if we are company that is on the “Scrutinized Companies that Boycott Israel List” (created pursuant to Section 215.4725, Florida Statutes) or are engaged in a boycott of Israel.
4. Neither I nor my firm are on the “Scrutinized Companies that Boycott Israel List” nor are we engaged in a boycott of Israel.

**E-Verify**

5. I understand that, pursuant to Section 448.095(2), Florida Statutes, we must comply with Florida’s E-Verify law in order to enter into an agreement with a public employer.
6. Our firm is registered with and uses the United States Department of Homeland Security’s E-Verify system to verify the work authorization status of all employees hired on or after January 1, 2021.
7. No public employer has terminated a contract with our firm under Section 448.095(2)(c), Florida Statutes, within the year immediately preceding the date of our proposal.
8. Our firm is currently in compliance and will remain in compliance, for the duration of the agreement, with all requirements of Section 448.095(2), Florida Statutes.
9. I understand that, if there is a good faith belief that our firm has knowingly violated Section 448.09(1), Florida Statutes, there is an obligation to terminate the agreement pursuant to Section 448.095(2)(c), Florida Statutes.
10. I understand that, if there is a good faith belief that one of our subcontractor(s) has knowingly violated the Section 448.09(1), Florida Statutes, but our firm has otherwise complied with its obligations thereunder, then our firm will be required to immediately terminate its contract with the subcontractor in order to continue providing services to a public employer.

**Non-Collusion**

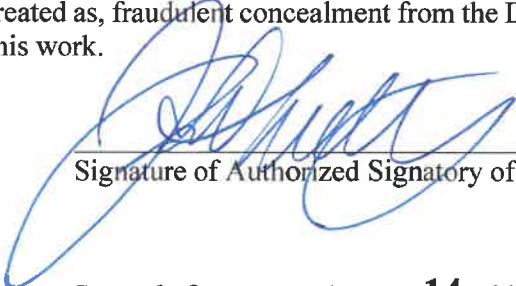
11. The price(s) and amount(s) of in our proposal have been arrived at independently and without consultation, communication, or agreement with any other proposer, potential proposer, proposal, or

{00096524.DOCX/2}

potential proposal.

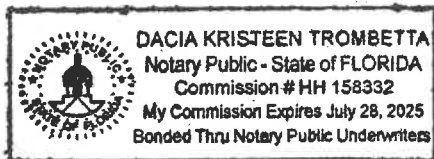
- 12. Neither the price(s) nor the amount(s) in our proposal, have been disclosed to any other firm or person who is a proposer or potential proposer, and they will not be disclosed before opening of all proposals.
- 13. No attempt has been made or will be made to induce any firm or persons to refrain from submitting a proposal, or to submit a price(s) higher than the prices in our proposal, or to submit any intentionally high or noncompetitive price(s) or other form of complementary proposal.
- 14. Our proposal is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- 15. Our firm, its affiliates, subsidiaries, officers, director, and employees are not currently under investigation, by any governmental agency and have not in the last 3 years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to any public contract, except as disclosed.

I state that I and the named firm understand and acknowledge that the above representations are material and important, and will be relied on by the Harbour Isles Community Development District for which our proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is, and shall be treated as, fraudulent concealment from the District of the true facts relating to the submission of proposals for this work.

 , CEO  
 \_\_\_\_\_  
 Signature of Authorized Signatory of Proposer

Sworn before me on August 14, 2023

  
 \_\_\_\_\_  
 Notary Public Signature



\_\_\_\_\_  
Notary Stamp



Harbour Isles Community Development District

**Official Proposal Form for  
Solicitation of Proposals for Landscape and Irrigation Maintenance Services**

Name of Proposer: RedTree Landscape Systems, LLC

In accordance with the solicitation of proposals issued by the Harbour Isles Community Development District the undersigned proposes to provide all work necessary to perform the scope of services as described in the Project Manual.

Proposer submits that it can perform the work described above summarized as follows and as more specifically described in Proposer's proposal:

1. Turf Maintenance	\$ <u>68,400.00</u>
2. Shrub and Groundcover Maintenance	\$ <u>41,800.00</u>
3. Tree Maintenance	\$ <u>19,200.00</u>
4. General Site Maintenance: Trash and Debris Disposal	\$ <u>15,600.00</u>
5. Irrigation System	\$ <u>12,000.00</u>
<hr/>	
<b>Total Yearly Cost for the first year of the above items</b>	\$ <u>157,000.00</u>
<b>Year 2</b>	\$ <u>157,000.00</u>
<b>Year 3</b>	\$ <u>161,710.00</u>
<b>3- Year Grand Total</b>	\$ <u>475,710.00</u>

6. Mulching for Tree and Shrub/Groundcover Bed Areas	\$ <u>19,250.00</u>
<i>Estimate of total cubic yards proposed to service the property:</i>	<u>350</u>
<i>Cost of Mulch Per Cubic Yard</i>	\$ <u>55.00</u>
<i>Irrigation Hourly Rate for items not included in the Scope of Services:</i>	\$ <u>65.00</u>

Proposer, thoroughly reviewed all components of the Project Manual and has a thorough understanding of the work required, the site and conditions where the work is to be performed, local labor conditions and all laws, regulations and other factors affecting performance of the work, having knowledge of the expense and difficulties attending performance of the work, and having fully inspected the site in all particulars, hereby proposes and agrees, if Proposer's proposal is accepted, to enter into the Proposed Agreement with the District.

Name of Authorized Signatory of Proposer: Peter Lucadano  
 Title of Authorized Signatory of Proposer: CEO / Owner  
 Signature of Authorized Signatory of Proposer: Peter Lucadano



**The New Standard in Landscape Maintenance**

**1.888.RED.TREE**

www.redtreelandscapesystems.com

5532 Auld Lane, Holiday FL 34690

## **CLIENT REFERENCES**

### **1. PRESERVE AT WILDERNESS LAKE CDD – Land O'Lakes**

- *Contact is Tom Picciano, Landscape Consultant, PSA*
- *Phone: (727) 505-1532*
- *E-Mail: [Tdobson@dpfgmc.com](mailto:Tdobson@dpfgmc.com)*

### **2. ASTURIA CDD - Odessa**

- *Contact is Tish Dobson, District Manager*
- *Phone: (813) 758-4841*
- *E-Mail: [tdobson@dpfgmc.com](mailto:tdobson@dpfgmc.com)*

### **3. TALAVERA CDD – Spring Hill**

- *Contact is Sean Craft, District Manager*
- *Phone: (813) 995-2437*
- *E-Mail: [scraft@rizzetta.com](mailto:scraft@rizzetta.com)*

**More references available upon request**





## ***Harbour Isles Community Development District***

### **PERSONNEL**

RedTree Landscape Systems enjoys the benefit of being a well-respected employer for landscape technicians in the Tampa Bay Area for the past three decades. As a result of treating employees fairly, offering the best wages in the business, provide a career path for staff and implementing state-of-the-art training processes for team associates, RedTree Landscape Systems maintains employee relationships that last for 5, 10, 15 and 20 years with many key staff. Additionally, RedTree maintains a “farm system” training program (similar to the Major League Baseball model) that allows for a consistent pipeline of ready, willing, and able potential staff to accommodate growth.

RedTree Landscape Systems performs extensive background checks, motor vehicle report history checks, employee identification (legal right to work in the United States) verification and full drug testing for each employee. RedTree Landscape Systems is proud to be a drug-free workplace.

RedTree Landscape Systems is proud to be an Equal Opportunity Employer. The RedTree Team is proud to be represented by many women and men representing many different races and origins.



### **PROFESSIONAL EXPERIENCE OF OWNERS, SUPERVISORS AND KEY EMPLOYEES**

- International Society of Arboriculture
- Florida Nursery, Growers and Landscape Association
- National Association for Landscape Professionals
- University of Florida Cooperative Extension
- Community Associations Institute
- Bay Area Apartment Association

Experience of company leadership includes:

#### **PETER LUCADANO (CEO & Owner)**

- 40 Years of experience in the Green Industry
- Bachelor's Degree from Liberty University
- Master's degree in business administration from the University of Phoenix
- International Certified Arborist
- Florida Certified Irrigation Contractor (Irrigation License Holder)
- Florida Certified Pest Control Contractor (Lawn & Ornamental)
- Nationally Certified Landscape Manager (*highest certification available in the Green Industry*)
- Florida Certified Best Management Practices Professional
- Florida Certified Horticulture Professional

#### **DAVID J. LUCADANO (President & Owner)**

- 40 Years of experience in the Green Industry.
- International Certified Arborist
- Florida Certified Pest Control Contractor (Lawn & Ornamental)
- Florida Certified Landscape Contractor
- Florida Certified Best Management Practices Professional

#### **BENJAMIN GARLAND (Account Manager)**

- 20 years of experience in the Green Industry
- Has been employed by David & Peter Lucadano for a combined 15 years
- Strong leadership and communication skills
- Extensive landscape maintenance experience on large-scale and CDD properties
- Florida Certified Best Management Practices Professional
- Florida Certified Pest Control Applicator

#### **JOHN BURKETT (Field Supervisor)**

- 50 years of experience in the Green Industry
- Has been employed by David & Peter Lucadano for a combined 15 years
- Excellent leadership skills
- Extensive landscape maintenance experience on large-scale and CDD properties
- Florida Certified Best Management Practices Professional
- Florida Certified Pest Control Applicator



**JUAN FLORES (Landscape Installation Supervisor)**

- 20 years of experience in the Green Industry
- Has been employed by David & Peter Lucadano for a combined 18 years
- Landscape construction experience ranging throughout the southeast in hardscape and landscape installation

**MARTIN FLORES (Lead Arbor Care Supervisor)**

- 21 years of experience in the Green Industry
- Has been employed by David & Peter Lucadano for a combined 19 years
- Extensive arbor care experience in all facets of work; worked through and after several major hurricanes on both coasts of Florida

**JOHN MOYLAN (Lead Irrigation Technician)**

- 25 years of experience in the Green Industry
- Has been employed by the David & Peter Lucadano for a combined 10 years
- Extensive knowledge in 2-wires systems and various pumping systems

**KEVIN SMITH (Horticulturist & Landscape Designer)**

- 30 years of experience in the Green Industry
- Has been employed by David & Peter Lucadano for a combined 5 years
- Extensive landscape maintenance and design experience on large-scale and CDD properties – including Universal Studios
- Responsible for managing lawn and shrub care program and treatments
- Florida Certified Best Management Practices Professional
- Florida Certified Pest Control Applicator
- Certified Drainage Professional

# PASCO COUNTY BUSINESS TAX RECEIPT

Issued pursuant and subject to Florida Statutes and Pasco County Ordinances. Issuance does not certify compliance with zoning or other laws. This receipt must be posted conspicuously in place of business.

**2024**

**Expires September 30th**



ACCOUNT #:: 105879

SIC CODE: 0781.01

**MIKE FASANO**  
**TAX COLLECTOR**  
**PASCO COUNTY FLORIDA**

TYPE OF BUSINESS  
 LANDSCAPING SERVICE

STATE LICENSE # /or COUNTY COMP CARD #

REDTREE LANDSCAPE SYSTEMS LLC

5532 AULD LANE  
 HOLIDAY, FL 34690

OWNER/QUALIFYING AGENT  
 LUCADANO PETER

LOCATION ADDRESS:  
 5532 AULD LANE  
 HOLIDAY, FL 34690

DATE	RECEIPT	AMOUNT
07/14/2023	23-0-129138	70.00



STATE OF FLORIDA  
Department of Agriculture and Consumer Services  
BUREAU OF LICENSING AND ENFORCEMENT

Date  
July 3, 2023

File No.  
JB273633

Expires  
May 31, 2024

THE PEST CONTROL COMPANY FIRM NAMED BELOW HAS REGISTERED UNDER THE PROVISIONS OF CHAPTER 482 FOR THE PERIOD EXPIRING: **May 31, 2024** AT

5532 AULD LANE  
HOLIDAY, FL 34690

REDTREE LANDSCAPE SYSTEMS  
5532 AULD LANE  
HOLIDAY, FL 34690

Lawn and Ornamental



WILTON SIMPSON, COMMISSIONER



Cut here

STATE OF FLORIDA  
Department of Agriculture and Consumer Services  
BUREAU OF LICENSING AND ENFORCEMENT

REDTREE LANDSCAPE SYSTEMS  
5532 AULD LANE  
PEST CONTROL COMPANY FIRM

JB273633

HAS PAID THE FEE REQUIRED BY CHAPTER 482 FOR THE PERIOD EXPIRING May 31, 2024



COMMISSIONER

Signature

Wallet Card  
Wallet Card - Fold Here

BUREAU OF LICENSING & ENFORCEMENT  
3125 CONNER BLVD, BLDG. 8  
TALLAHASSEE, FLORIDA 32399-1650

STATE OF FLORIDA  
Department of Agriculture and Consumer Services  
BUREAU OF LICENSING AND ENFORCEMENT

Date August 1, 2023 File No. JF118508 Expires June 1, 2024

THE CERTIFIED PEST CONTROL OPERATOR NAMED BELOW HAS REGISTERED UNDER THE PROVISIONS OF CHAPTER 482 FOR THE PERIOD EXPIRING: June 1, 2024

DAVID JOHN LUCADANO  
5532 AULD LANE  
HOLIDAY, FL 34690

Lawn and Ornamental



WILTON SIMPSON, COMMISSIONER

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STATE OF FLORIDA  
Department of Agriculture and Consumer Services  
BUREAU OF LICENSING AND ENFORCEMENT

DAVID JOHN LUCADANO  
CERTIFIED PEST CONTROL OPERATOR

JF118508

HAS PAID THE FEE REQUIRED BY CHAPTER 482 FOR THE PERIOD EXPIRING June 1, 2024



WILTON SIMPSON  
COMMISSIONER

Signature

Wallet Card  
Wallet Card - Fold Here

BUREAU OF LICENSING & ENFORCEMENT  
3125 CONNER BLVD, BLDG. 8  
TALLAHASSEE, FLORIDA 32399-1650

STATE OF FLORIDA  
Department of Agriculture and Consumer Services  
BUREAU OF LICENSING AND ENFORCEMENT

Date: April 20, 2021      File No.: LF203707      Expires: April 22, 2025

THE LTD COMMERCIAL FERTILIZER APPLICATOR HOLDER NAMED BELOW HAS REGISTERED UNDER THE PROVISIONS OF CHAPTER 482 FOR THE PERIOD EXPIRING: April 22, 2025

PETER LUCADANO  
5532 AULD LANE  
HOLIDAY, FL 34690

*Nicole Fried*

NICOLE "NIKKI" FRIED, COMMISSIONER

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STATE OF FLORIDA  
Department of Agriculture and Consumer Services  
BUREAU OF LICENSING AND ENFORCEMENT

PETER LUCADANO  
LTD COMMERCIAL FERTILIZER APPLICATOR HOLDER

LF203707

HAS PAID THE FEE REQUIRED BY CHAPTER 482 FOR THE PERIOD EXPIRING April 22, 2025

*Nicole Fried* Signature  
COMMISSIONER

Wallet Card  
Wallet Card - Fold Here

BUREAU OF LICENSING & ENFORCEMENT  
3125 CONNER BLVD, BLDG. 8  
TALLAHASSEE, FLORIDA 32399-1650





The Florida Nursery, Growers & Landscape Association  
*Confers on*

**Peter Lucadano**  
**H05549**

*The Title of*  
**FNGLA Certified Horticulture Professional (FCHP)**

Expiration Date: 12/31/2024  
 Certified Since: 12/10/2003

Martin Hackney, FNGLA President

Merry Mott, FNGLA Certification Director



# Department of Environmental Protection

2600 Blair Stone Road, M.S. 3510  
Tallahassee, Florida 32399-2400



GI-BMP Trainee ID: GV3548  
Certification date: 10/21/2008

Congratulations on successfully completing the Florida Green Industries Best Management Practices Training Program. Your certificate of completion and wallet card are attached. If there are errors in the certificate, or if we can be of further assistance, please contact the GI-BMP Office of the Florida-Friendly Landscaping™ Program at [gi.bmp@ifas.ufl.edu](mailto:gi.bmp@ifas.ufl.edu) or (352) 273-4517.

Please note that this training certificate alone does not authorize you to apply fertilizer commercially after January 1, 2014. You must take additional steps to become licensed for commercial fertilizer application in the state of Florida. The Limited Urban Commercial Fertilizer Applicator Certification (state "fertilizer license") is issued by the Florida Department of Agriculture and Consumer Services (FDACS).

Apply online: <https://aesecomm.freshfromflorida.com>. The certificate number from this document is required to apply for Fertilizer Applicator Certification. For assistance contact: The Bureau of Entomology and Pest Control, (850) 617-7997

If your test score is 90% or greater, you may be eligible to become a GI-BMP Instructor:  
[http://fyn.ifas.ufl.edu/professionals/instructor\\_program.html](http://fyn.ifas.ufl.edu/professionals/instructor_program.html)

**Test Score: 95%**

Peter Lucadano  
RedTree Landscape Systems  
5532 Auld Ln  
Holiday, FL 34690

State of Florida  
DEPARTMENT OF  
ENVIRONMENTAL PROTECTION

**Peter Lucadano**

GV3548-1

GV3548

Certificate #

Trainee ID #

GREEN INDUSTRIES BEST MANAGEMENT PRACTICES  
TRAINING PROGRAM



GV3548-1

Certificate #

GV3548

Trainee ID #

## Certificate of Training Best Management Practices Florida Green Industries



**Peter Lucadano**

has successfully met all requirements necessary to be fully trained through the Green Industries Best Management Practices Program developed by the Florida Department of Environmental Protection with the University of Florida Institute of Food and Agricultural Sciences.

Issuer

D. Rainey  
Instructor

10/21/2008  
Date of Class

DEP Program Administrator

Not valid without seal



The Florida Nursery, Growers & Landscape Association  
*Confers on*

**David Lucadano**  
**C00200**

*The Title of*  
**FNGLA Certified Landscape Contractor (FCLC)**

Expiration Date: 12/31/2024  
 Certified Since: 11/7/2001

A handwritten signature in black ink, appearing to read 'Martin Hackney'.

Martin Hackney, FNGLA President

A handwritten signature in black ink, appearing to read 'Merry Mott'.

Merry Mott, FNGLA Certification Director





The Florida Nursery, Growers & Landscape Association  
*Confers on*

**David Lucadano**  
**H05548**

*The Title of*  
**FNGLA Certified Horticulture Professional (FCHP)**

Expiration Date: 12/31/2024  
 Certified Since: 12/10/2003

Martin Hackney, FNGLA President

Merry Mott, FNGLA Certification Director

Congratulations on successfully completing the Florida Green Industries Best Management Practices Training Program. We greatly appreciate your participation in and successful completion of this course. We hope that it has helped you to better understand Florida's nonpoint source pollution problems and the importance of proper design, construction, irrigation, fertilization, pest control, and maintenance of lawns and landscapes, in order to assure minimal adverse environmental effects while achieving customer expectations.

Attached you will find your numbered certificate and wallet card. Please let me know if there are any errors in the certificate or card, or in the grading of your exam. If we can be of further assistance, please do not hesitate to contact Dr. Trenholm at 352/392-1831x374 or via email: [letr@ufl.edu](mailto:letr@ufl.edu).

David Lucadano  
 10020 Living Word Ct  
 New Port Richey, FL 34654

State of Florida  
 DEPARTMENT OF  
 ENVIRONMENTAL PROTECTION

**David Lucadano**

GV4001-1 GV4001

Certificate # Trainee ID #

GREEN INDUSTRIES BEST MANAGEMENT PRACTICES  
 TRAINING PROGRAM



GV4001-1

Certificate #

GV4001

Trainee ID #

UNIVERSITY OF  
**FLORIDA**  
 IFAS EXTENSION

**Certificate of Training  
 Best Management Practices  
 Florida Green Industries**

The undersigned hereby acknowledges that

**David Lucadano**

has successfully met all requirements necessary to be fully trained through the Green Industries Best Management Practices Program developed by the Florida Department of Environmental Protection with the University of Florida Institute of Food and Agricultural Sciences.

Dr. L.E. Trenholm

Issuer

Trenholm

Instructor

1/27/2009

Date of Class

*John Chubb*  
 DEEP Program Administrator

Not valid without seal



The Florida Nursery, Growers & Landscape Association  
*Confers on*

**Kevin Smith**  
**H9356997**

*The Title of*  
**FNGLA Certified Horticulture Professional (FCHP)**

Expiration Date: 12/31/2025  
 Certified Since: 12/26/2022

A handwritten signature in black ink, appearing to read 'Merry Mott'.

Merry Mott, FNGLA Certification Director

A handwritten signature in black ink, appearing to read 'Eric Smith'.

Eric Smith, FNGLA President





# Department of Environmental Protection

2600 Blair Stone Road, M.S. 3510  
Tallahassee, Florida 32399-2400



GI-BMP Trainee ID: GV909406  
Certification date: 2/6/2019

Congratulations on successfully completing the Florida Green Industries Best Management Practices Training Program. Your certificate of completion and wallet card are attached. If there are errors in the certificate, or if we can be of further assistance, please contact the GI-BMP Office of the Florida-Friendly Landscaping™ Program at [gi.bmp@ifas.ufl.edu](mailto:gi.bmp@ifas.ufl.edu) or (352) 273-4517.

Please note that this training certificate alone does not authorize you to apply fertilizer commercially after January 1, 2014. You must take additional steps to become licensed for commercial fertilizer application in the state of Florida. The Limited Urban Commercial Fertilizer Applicator Certification (state "fertilizer license") is issued by the Florida Department of Agriculture and Consumer Services (FDACS).

Apply online: <https://aesecomm.freshfromflorida.com>. The certificate number from this document is required to apply for Fertilizer Applicator Certification. For assistance contact: The Bureau of Entomology and Pest Control, (850) 617-7997

If your test score is 90% or greater, you may be eligible to become a GI-BMP Instructor:  
[http://fyn.ifas.ufl.edu/professionals/instructor\\_program.html](http://fyn.ifas.ufl.edu/professionals/instructor_program.html)

**Test Score: 95%**

State of Florida  
DEPARTMENT OF  
ENVIRONMENTAL PROTECTION

Kevin L. Smith  
Southeast Dream Scapes LLC  
6546 W Meadow St  
Homosassa, FL 34446

**Kevin L. Smith**

GV909406-1

Certificate #

GV909406

Trainee ID #

GREEN INDUSTRIES BEST MANAGEMENT PRACTICES  
TRAINING PROGRAM



## Certificate of Training Best Management Practices Florida Green Industries

GV909406-1

Certificate #

GV909406

Trainee ID #

**Kevin L. Smith**

has successfully met all requirements necessary to be fully trained through the Green Industries Best Management Practices Program developed by the Florida Department of Environmental Protection with the University of Florida Institute of Food and Agricultural Sciences.

\_\_\_\_\_  
Issuer

**T. Wichman**  
\_\_\_\_\_  
Instructor

2/6/2019  
\_\_\_\_\_  
Date of Class

\_\_\_\_\_  
DEP Program Administrator

Not valid without seal



Kevin Smith OF Red Tree Landscape Systems  
FIRST NAME, LAST NAME COMPANY

Having demonstrated an understanding of drainage principles and practices and through a satisfactory evaluation of presented material is hereby certified as a

# PROFESSIONAL DRAINAGE CONTRACTOR

Issued on: 6/11/2022  
MM/DD/YYYY



*Michael Schreiber*

VALID FOR TWO YEARS FROM DATE OF ISSUANCE.  
MICHAEL SCHREIBER P.L.A., A.S.L.A.  
STORMWATER PRODUCT MANAGER



## **HARBOUR ISLES CDD NARRATIVE DESCRIPTION & OPERATIONAL PLAN**

All administration, landscape operations, and staging for this contract, will be based out of:

**5532 Auld Lane  
Holiday, FL 34690**

Our corporate headquarters are owned by David and Peter Lucadano under the name Depco Visions LLC.

- Located at 5532 Auld Lane, Holiday, FL 34690.
- 17-acre facility with on-site green waste disposal and recycling center.
- Over 20,000 sq. ft. of office and warehouse space.
- Tour of our facility is available by appointment

Crews will leave from our satellite location each morning and arrive at Harbour Isles CDD at approximately 8:00AM and work on property until 3:30 PM.

Prior to leaving our base of operations each morning, each crew will partake in the following:

- Weekly safety meetings
- Pre-job prep and safety inspection to check all equipment, vehicles, and supplies.
- Fueling up of all equipment and vehicles.
- Loading up vehicles with ice, water, and supplies.
- Review plans, maps, and work orders for each designated section and scope of services.
- Sharpen and sterilize all mower and hedge trimmer cutting blades, chainsaw blades, and pruner blades.
- Clean vehicles and equipment.
- Dump and dispose of green waste debris from previous day's work.



<p><b>Project Manager:</b></p> <p>Benjamin Garland</p> <p><b>After Hours Contact (727) 810-4253</b></p> <p>Roles: Oversee entire scope of services to ensure contract compliance, monitor quality, support crews, and communicate with clients at all levels.</p>	 A portrait of Benjamin Garland, a man with short dark hair, smiling. He is wearing a dark blue polo shirt with the 'redtree' logo on the chest. The background is a grassy area.
<p><b>Assistant Project Managers:</b></p> <p>David Lucadano <b>After Hours Contact (727) 919-3913</b></p> <p>Peter Lucadano <b>After Hours Contact (727) 919-3915</b></p> <p>To serve as an assistant, mentor and back up to Project Manager.</p>	 A photograph of two men standing next to a red pickup truck. The man on the left is wearing a black polo shirt and light-colored pants. The man on the right is wearing a black polo shirt and dark pants. The red truck has the 'redtree' logo and 'Landscape Systems' written on its side.
<p><b>Field Supervisor:</b></p> <p>John Burkett</p> <p><b>Contact (727) 267-2059</b></p> <p>Responsible for overall daily operations, scheduling, and communications with all the crews and client, and inspection of overall property at the field level.</p>	 A portrait of John Burkett, an older man with short grey hair and glasses. He is wearing a bright yellow high-visibility shirt. The background is a plain, light-colored wall.

## **GENERAL SERVICES GROUNDS MAINTENANCE – MOWING (INCLUDING RETENTION PONDS) :**

Two (2) ground maintenance (mowing crews) with each crew having one (1) working crew supervisor and five (5) additional crew members. Crew Supervisors will be identified distinctly in a full company uniform labeled with company name and personal name of supervisor. Crew members will be uniformed with company branded dry-fit shirts that are safety-yellow in color.

Company resources include:

- (28) Ford F-450 dump trucks with large debris holding capacity
- (21) Specialty trucks ranging F-250 Irrigation trucks, Mack Truck watering specialty vehicles to pest control tanker trucks.
- (31) Enclosed & open trailers
- (42) Riding mulch-deck 60” or 72” John Deere ZTR mowers – Largest engines possible with high HP for high-speed mowing.
- (56) Walk-behind mulch-deck mower 52” or 60” with Velke – Largest engines possible with high HP for high-speed mowing.
- (6) Walk-behind 34” mulching mower
- (200+) String Trimmers
- (200+) Edgers
- (150+) Backpack blowers
- (4) Hurricane street blowers
- (55) Hand blowers
- (125+) Extended hedge trimmers
- (85+) Chainsaws
- (40+) Power pruners
- (300+) Backpack sprayers 4G
- Ladders
- Assorted hand tools, rakes, pruners, shovels, etc.
- Debris barrels & trash bags
- Rolling stock of repair tools and supplies for equipment and Landscape operations
- Fuels/Oils
- Pesticides for weed control and Fire ants
- Large cooler of ice and water
- First Aid Kit
- Safety cone



**Additional support crews (labor, equipment & vehicles) are available to assure that mowing operations are performed according to schedule.**

## GENERAL SERVICES GROUNDS MAINTENANCE – DETAILING:

Two (2) grounds maintenance detailing crews with each crew having one (1) working crew supervisor and four (4) additional crew members. Crew supervisor will be identified distinctly in a full company uniform labeled with company name and personal name of supervisor. Crew members will be uniformed with company branded dry-fit shirts that are safety-yellow in color. All detail crew members will be equipped with hand-pruners and sheathes to properly hand prune plants in order to assure proper health, development, and sustainability of plants.

During each mowing visit, the “detailing” objective will be to prune and weed 50% of the planter beds on property. Using this method, the property will be pruned and weeded a total of (2) times per month during the growing season months and (1) time per month during the dormant season.



## TURF/TREE/SHRUB CARE

Each Horticultural crew will consist of two (2) working Horticulturist/Pest Control Applicators. Lead Horticulturist identified distinctly in a full company uniform labeled with company name and personal name of supervisor.

Each Horticultural crew will be equipped with the following:

- Isuzu flatbed spray truck with 400-500G spray tank
- John Deere Gator with 150G spray tank
- 16’ enclosed trailer
- (2) Bumblebee spreader & sprayer applicator
- (6) Hand spreaders
- (8) Backpack sprayers 4G
- (2) Backpack blowers
- Pesticide for IPM & Applications
- Fertilizer for applications
- Spill kits
- Pesticide application stakes & signs
- Safety cones
- Respirators
- Boots & other safety attire





**IRRIGATION**

Two (2) Irrigation crews, each crew having one (1) working lead technician and one (1) assistant . Lead technician will be identified directly in a full company uniform and different color labeled with company name and personal name of supervisor. Assistant will be uniformed with company branded dry-fit shirts that are safety-yellow in color.

Irrigation crew will be equipped with the following:

- Ford Transit Van (to store a decent array of fast moving parts)
- John Deere Gator Utility vehicle
- Vermeer trencher when needed
- Appropriate controller remotes
- Wire tracker
- Tools & supplies
- Rolling stock of irrigation parts, wire, fittings, etc.
- Safety cones
- Safety kit
- Cooler of ice & water
- Irrigation flags



Additional support crews, technicians, helpers, equipment, vehicles, parts, and supplies are available and will be brought in to assist with project when needed.

**PROPOSED IRRIGATION SCHEDULE – MONTHLY INSPECTIONS**

WEEK	IRRIGATION CREW
1	25% of property
2	25% of property
3	25% of property
4	25% of property

## **PALM TRIMMING – ARBOR-CARE CREW**

Our ISA Certified Arborists, climbers, and ground-crews will perform the annual palm pruning and structural pruning requirements of the contract.

Each crew is equipped with a chip/dump truck, chipper shredder, portable aerial lift with 60’ reach, chainsaws, and multiple types of pruning tools and ladders. Company uniforms and no sub-contracting.

The Arbor-Care crews are available to handle any type of tree work such as removals, pruning, and stump-grinding.



## **ADMINISTRATION, OFFICE, SUPPORT**

Our fully staffed office based in Holiday Florida will assist with the ongoing management and operations of landscape service to your property.

We utilize the Maxpanda software program for client/resident work orders and requests.

## **MONTHLY LANDSCAPE INSPECTION**

RedTree Landscape Systems will participate in the monthly landscape inspections and provide the following:

- (1) John Deere Gator Utility Vehicle – 4 seaters
- Account Manager participation
- Field Supervisor participation – when available
- An owner of our firm – when available



## HURRICANE OR LARGE SCALE STORM EMERGENCY RESPONSE PLAN

### Before The Storm

- If your irrigation system is fed off of a well, we will shut your pumps down to prevent any mainline leaks that could develop from storm damage through the storm.
- We are assuring internally that we are well-equipped and stocked to handle post-storm response in an effective and orderly manner.

### Storm Emergencies

- We will attempt to inspect your property as soon as we are physically able to do so. We also will be accessible to receive **emergency phone calls** from you or your authorized representatives to address the following emergency scenarios:
  - **Fallen trees blocking roadways.**
  - **Fallen trees blocking walkway access to homes.**
  - **Fallen trees on homes / structures.**
  - **Fallen trees on vehicles.**
  - **Irrigation break involving running water / flooding.**
- In order to report any one of the above-stated emergency scenarios, please assure that an authorized person representing your property contact:
  - **Pete Lucadano: (727) 919-3915**
  - **David Lucadano: (727) 919-3913**
  - **Ben Garland: (727) 810-4253**
  - **John Burkett: (727) 267-2059**
  - **FOR IRRIGATION EMERGENCIES: John Moylan: (727) 267-7794**



## **After The Storm**

After the storm has left our area and conditions are safe for our staff to access allowable areas, we will immediately begin the process of inspecting properties and addressing service in a three-phase manner as follows:

**PHASE 1 - EMERGENCIES (as listed above):** Fallen trees will be cut and safely stacked close to the area of origin. Crews will then move on to address the next emergency until we are assured that all emergency scenarios on each of our client properties are addressed.

**PHASE 2 - LARGE AESTHETICS:** Fallen trees throughout the property that are not considered emergencies will either be re-planted / staked or removed, cut up and stored in piles located in safe locations throughout the property. This process will be performed in order of need until we are assured that all such needs on each of our client properties are addressed.

**PHASE 3 - AESTHETICS:** Small debris, branches and necessary blowing will be performed throughout the property. Debris will be stacked in piles located in safe locations throughout the property. This process will be performed in order of need until we are assured that all such needs on each of our client properties are addressed.

**PHASE 4 - DEBRIS PICK-UP:** As a last step in the storm clean-up process, debris piles will be removed from the property.



## ***Harbour Isles Community Development District***

### **QUALITY ASSURANCE**

**WARRANTIES:** RedTree Landscape Systems will warranty all plant material and sod installed by RedTree Landscape Systems for the lifetime of the existing and all subsequent landscape maintenance contracts that are negotiated with Harbour Isles Community Development District. Exclusions to this warranty include acts of God, theft, or vandalism.

**WORKMANSHIP GUARANTEES:** RedTree Landscape Systems provides full and complete workmanship guarantees for all provided work for this project. Exclusions to these guarantees include acts of God, theft, or vandalism.

**WHAT WE ARE NOT:** We are not going to claim to be the largest landscape contractor in your bid pool. We will not claim to have an out-of-Florida headquarters, many layers of leadership and managers, and an out-of-touch ownership team.

**WHAT WE ARE:** We are local, family-owned landscape company that maintains the crisp professionalism and capabilities that can match any national landscape contracting firm. We are personal... We are accessible... We are easy to do business with... We keep our word.



## ***Harbour Isles Community Development District***

### **FINANCIAL CAPABILITIES AND RESOURCES**

RedTree Landscape Systems LLC is a well-capitalized company, privately owned by Peter and David Lucadano.

- We are not a publicly traded company, and we have no equity investors or partners.
- Our debt ratio is low which allows us to purchase materials and assets by cash, when needed.
- We maintain excellent credit and credit lines with all our suppliers and vendors.
- We have over 2 million dollars in credit lines available to us through Ford Motor Credit and John Deere Company, to allow for truck and equipment purchases when necessary.
- All our payroll and payroll taxes are paid on a weekly basis.
- Our federal and state income taxes for our business are paid on a quarterly basis.

For more information on our financial capabilities and status, please feel free to contact us or our CPA.

Nancy Leins, CPA  
(813) 760-5112  
[nancyleinscpa@gmail.com](mailto:nancyleinscpa@gmail.com)





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/03/2023

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

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

<b>PRODUCER</b> <b>McGriff Insurance Services</b> 12485 28th Street N 3rd Floor St Petersburg, FL 33716 727-823-5551		<b>CONTACT NAME:</b> Denise Carpenter <b>PHONE (A/C, No, Ext):</b> 727-823-5551 <b>E-MAIL ADDRESS:</b> Denise.Carpenter@mcgriff.com	<b>FAX (A/C, No):</b> 727-894-3339														
<b>INSURED</b> <b>Redtree Landscape Systems, LLC</b> 5532 Auld Lane Holiday, FL 34690		<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : Greenwich Insurance Company</td> <td>22322</td> </tr> <tr> <td>INSURER B : RetailFirst Insurance Company</td> <td>10700</td> </tr> <tr> <td>INSURER C : Auto Owners Insurance</td> <td>18988</td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Greenwich Insurance Company	22322	INSURER B : RetailFirst Insurance Company	10700	INSURER C : Auto Owners Insurance	18988	INSURER D :		INSURER E :		INSURER F :	
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INSURER E :																	
INSURER F :																	

**COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
<b>A</b>	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <b>PD Ded:1,000</b> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			<b>NPC100378903</b>	<b>04/01/2023</b>	<b>04/01/2024</b>	EACH OCCURRENCE \$ <b>1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>300,000</b> MED EXP (Any one person) \$ <b>5,000</b> PERSONAL & ADV INJURY \$ <b>1,000,000</b> GENERAL AGGREGATE \$ <b>2,000,000</b> PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b> \$
<b>C</b>	<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			<b>52265505</b>	<b>04/01/2023</b>	<b>04/01/2024</b>	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
<b>A</b>	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			<b>NEC-6006968-01</b>	<b>04/01/2023</b>	<b>04/01/2024</b>	EACH OCCURRENCE \$ <b>1,000,000</b> AGGREGATE \$ <b>1,000,000</b> <b>Products Agg</b> \$ <b>1,000,000</b>
<b>B</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> N/A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			<b>520-56705</b>	<b>10/05/2022</b>	<b>10/05/2023</b>	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ <b>1,000,000</b> E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b> E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>
<b>A</b>	<b>Leased/Rented Equipment</b>			<b>NPC100378903</b> <b>NPC100378903</b>	<b>04/01/2023</b> <b>04/01/2023</b>	<b>04/01/2024</b> <b>04/01/2024</b>	<b>\$75,000 Limit</b> <b>\$595,861 Limit</b> <b>\$2,500 Deductible</b>

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

<b>CERTIFICATE HOLDER</b>  <b>For Information Purposes Only</b>	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE  

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	<b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	<b>2</b> Business name/disregarded entity name, if different from above	
	<b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input checked="" type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate  <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.  <input type="checkbox"/> Other (see instructions) ▶ _____	<b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
	<b>5</b> Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	<b>6</b> City, state, and ZIP code	
<b>7</b> List account number(s) here (optional)		

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>	
-	-
<b>or</b>	
<b>Employer identification number</b>	
-	-

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ▶ <i>Peter Lucadano</i>	Date ▶ August 8, 2023
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

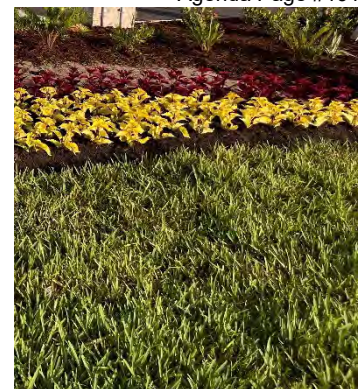
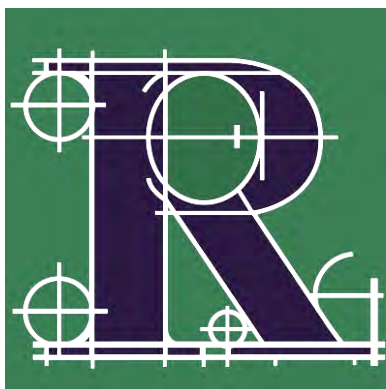
- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*





ATLANTA + CHARLESTON + DESTIN + NASHVILLE + SAVANNAH + TAMPA

# PROPOSAL FOR PARTNERSHIP

## HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT



UNMATCHED IN THE INDUSTRY



## Russell Landscape

August 14<sup>th</sup>, 2023

RE: Harbour Isles Community Development District – Landscape and Irrigation Maintenance Services

As landscape service provider for the Harbour Isles CDD, Russell Landscape's primary objective will be to enhance the experience of all those who encounter the District through sound economical delivery of landscape management services and to ensure all residents, guests, and employees return home safely every day. We are well versed in working on similar high profile and expansive sites, clear of the level of expectation, and capable of delivering it. Working in concert with Harbour Isles to manage and enhance the grounds through a systematic phased approach will be a principle focus for Russell Landscape. We are prepared to deliver a general outline of our plan and would welcome a chance to present.

Clear communication will be key in the day-to-day management and continual improvement of the District's landscapes. Our dedicated account manager will conduct evaluations of the property before and after service, noting any unique landscape maintenance items for completion over the next service as well as any issues with structures, safety, lighting, parking, or anything of note the District should be aware of. Any issues will be communicated to district management as needed. These evaluations will be key in driving the quality and continual improvement of the District's grounds as well as addressing concerns in a timely manner.

As one of the largest family-owned commercial landscape companies in the southeast, we have a vast amount of support available beyond the crews dedicated to the management of the Harbour Isles CDD grounds. In the unusual event of severe storm, surprise events, or other unknown need, our staff of over 600 will always be available to get across whatever finish line presents itself. With all the daily challenges the management of the District presents, you can feel confident Russell Landscape will assume ownership of your grounds as our own. We would be honored to be your partner.

Truly,



Teddy Russell

CEO

Russell Landscape

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## **COMPANY HISTORY**

Founded in 1987 by Dr. W.E. "Bill" Russell, Russell Landscape is a family owned and managed commercial landscape company. Based in Sugar Hill, Georgia, it has grown to be one of the largest landscape firms in the southeast. Russell Landscape offers a complete scope of diverse landscape services catering to master planned communities, municipalities, community improvement & development districts, commercial buildings, retail centers, schools, homeowners' associations, and townhome and condominium communities. These services include landscape design and installation, hardscapes, irrigation, maintenance, chemical, and technical services. Russell Landscape has received numerous awards from the Urban Agriculture Council, for projects both installed and maintained. The company has consistently been listed in the Business Chronicle's best commercial landscape contractors for more than 20 years and is also listed in the Top 60 landscape contractors in the country. Russell Landscape has been fortunate enough to provide maintenance and installation services to numerous master planned communities, corporate campuses and high-profile sites throughout the southeast including the Federation of King's Point Associations, the SanDestin Owner's Association, the Gwinnett Place Community Improvement District, the University of South Florida Sarasota campus, the Gas South District and Arena, Kennesaw State University, and the Hilton Sandestin Beach Golf Resort & Spa, just to name a few.

Russell Landscape produced approximately 62 million dollars in annual landscape revenues in 2022 while providing landscape services to over 1,400 properties. At Russell, we take pride in our work and are committed to providing our customers with the highest level of professional, personalized services, available in the industry. Our goal is to create a memorable and impactful environment for all users while ensuring minimal disturbance to users and distraction to our customers. Russell Landscape's vast support system is populated with highly educated and trained landscape professionals specializing in each facet of our business. The company's local branch is in Ruskin, FL and in the event additional support is needed, the Savannah, Destin, Ft. Walton, and 4 Atlanta branches are available at a moment's notice. We take great pride in the people that represent our company and the approximately 600 Russell Landscape employees have the full support of one of the southeast's largest family-owned landscape contractors. The company, its ownership, and team of employees have always strived to be good stewards to the community and the environment. Each year Russell Landscape donates a great deal of time and resources to raise funds for different sectors of the community. The company is also highly focused on issues relating to clean water, conservation, and the protection of our environment. We are involved with the U.S. Green Building Council, Urban Agriculture Council, various Water Councils, and the Clean and Beautiful Campaigns. Our ownership and executive team believe these initiatives and affiliations help create a specific company culture in which every employee strives toward the same goal, which translates to delivery of the highest level of service available in the industry.



## **ABOUT OUR TEAM**

Teddy Russell is the owner and Chief Executive Officer of Russell Landscape and holds a Bachelor of Business Administration degree from the University of Georgia's Terry College of Business. Teddy's primary role and responsibility is hiring, identifying, and developing his dream team of professionals along with making sure they have the resources necessary to provide the same customer experience that his father demanded since starting the company in 1987. Teddy can be reached via email at [TeddyR@RussellLandscape.com](mailto:TeddyR@RussellLandscape.com) or cell phone at 770-560-2315

Hugh Cooper is the Chief Operating Officer for Russell Landscape and has been a leader in the landscape industry for 25 years. He holds a Bachelor of Science in Landscape Architecture and a minor in Horticulture from the University of Georgia. He is a member of the Turfgrass Association, the Urban Agriculture Council, and the Community Association Institute. Hugh has spent his entire career managing ornamental landscape in the southeast and is a wealth of knowledge that will ensure no pest, disease, or fertility issues go untreated. Hugh will be integrally involved with the service and management of the Harbour Isles CDD and is available via e-mail at [HughC@RussellLandscape.com](mailto:HughC@RussellLandscape.com) or cell phone at 678-537-1155.

Will Dutton is the General Manager of our Tampa area operations and will be overseeing the day-to-day management of the Harbour Isles CDD. Will's first position held with Russell Landscape was as a laborer on one of our maintenance trucks, but with 20 years of experience under his belt in the commercial landscape management field, he was quickly promoted through the ranks to the management position he holds today. Keeping the client's expectations at the center of his focus while always delivering a quality product has endeared him to his customers and entrenched him a true leader to his crews and peers. Will can be reached via email at [WilliamD@RussellLandscape.com](mailto:WilliamD@RussellLandscape.com) or cell phone at 407-399-8602.

Greg Pittman – Branch Manager, Horticulture Services Manager, and Irrigation Manager, will be handling the day-to-day management of the Harbour Isles irrigation systems, horticulture services, and management. Greg is an invaluable resource and team member at Russell Landscape, with over 11 years' experience as an Agronomist, 5 years of experience in commercial landscape, and has been with Russell Landscape for 2 years, for a total of 17 years in the industry. Greg continues to put a great deal of effort into continually educating himself on the constantly evolving technology and products in the related fields. This dedication and experience have earned the respect of his peers and superiors and shaped him into the strong leader and customer service expert he is today. Greg can be reached via email at [GregP@RussellLandscape.com](mailto:GregP@RussellLandscape.com) or cell phone at 470-642-8316.

## Russell Landscape

Marcos Rosales, Senior Account Manager in our Tampa branch, will be the backup to Greg Pittman when handling the day-to-day management of Harbour Isles CDD. Marcos has over 15 years of landscape experience, including 4 years with Russell Landscape, and is FNGLA certified, Florida Department of Agriculture and Consumer Services certified, and has a degree in Best Management Practice from the University of Florida. His experience with installation, irrigation, and irrigation services gives him a strong foundation to support his team and customer base. Marcos can be reached via email at [MarcosR@RussellLandscape.com](mailto:MarcosR@RussellLandscape.com) or cell phone at 813-610-4996.

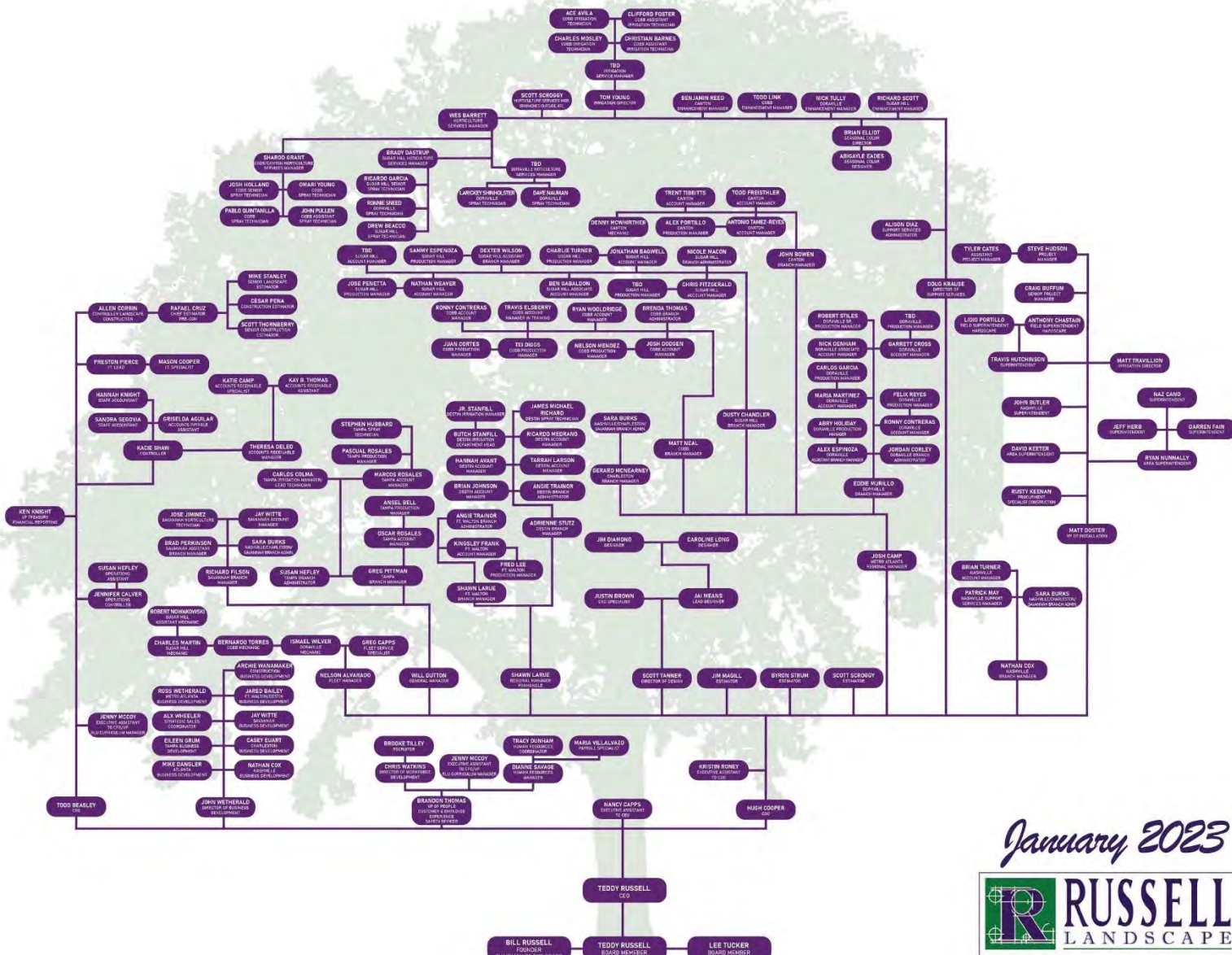
Nick Denham, Account Manager in our Ruskin, FL branch, will be the Account Manager for Harbour Isles CDD. Nick has worked in the commercial landscape industry for over 5 years at our Atlanta branch and is well versed in all aspects of landscape management. Nick is a relatively new addition to the Florida Russell Landscape team with one year of service here but exemplifies our dedication to hire the best and brightest in the industry. His experience includes horticulture services, landscape installation, floriculture services, irrigation services, commercial maintenance, and landscape enhancement services. Nick can be reached via email at [nickd@RussellLandscape.com](mailto:nickd@RussellLandscape.com) or cell phone at 770-500-6614.

Matt Doster is our Director of Landscape Construction and will handle the design, management, and implementation of any large-scale enhancements the District elects to undergo. Matt has an extensive background in landscape construction in the southeast spanning the last 20 years. He joined the Russell Landscape team in 2016 and is now our resident expert in all areas of construction including planting, hardscapes, irrigation, low voltage lighting, and just about any challenge we have run across. He's been involved in many recent high-profile jobs including the Southall Farms, the Zoo Atlanta elephant enclosure, the Cherokee Country Club renovation, and Six Flags & Riverside & I-20 interchanges just to name a few. Matt can be reached via email at [MattD@RussellLandscape.com](mailto:MattD@RussellLandscape.com) or cell phone at 678-618-0023

Russell Landscape

**ORGANIZATIONAL CHART:**

The Russell Landscape team is populated with experts in our field and have foundations that match our core values. We call it our family tree.



**CORE VALUES:**

1. Faith and Family
2. Heart of Service
3. Integrity
4. Pursuit of Knowledge and Excellence





## Russell Landscape

### **OPERATIONAL PLAN:**

Russell Landscape is well equipped to help and excited about the prospect of becoming a long-term partner of the Harbour Isles CDD. Immersing ourselves and our operation in the day-to-day activity, community, and culture, will be a joy.

After carefully measuring all landscape areas that comprise the included scope for the Harbour Isles CDD, Russell Landscape has determined the specific number of man hours required to maintain each individual area as well as all areas as whole. Each area was measured to determine the specific turf type and square footage, linear footage of edging, seasonal pruning, and leaf removal time as well as seasonal color, and mulch square footage.

**Russell Landscape will utilize a 4-person maintenance crew to manage the grounds of the Harbour Isles CDD. We plan to operate in 2, 9-hour days, however, should additional service be required, additional crews will be available on Fridays and weekends to address any additional requests or complete any weekly service visit items that were not completed during the regular service visits. The crew will have a complete set of all necessary maintenance equipment; large mowers, push mowers, metal blade edgers, string trimmers, blowers, and backpack sprayers, as well various hand tools such as any necessary pruning equipment, shovels, tarps, rakes, brooms, etc.**

All turf, tree, shrub and groundcover fertilization and pesticide applications shall be performed by the dedicated Russell Landscape horticultural services department whose only focus is plant health. These applications will be applied using our logoed spray vehicles and personnel applying both liquid and granular products at the proper rates per material label and under EPA guidelines and restrictions. Russell Landscape currently has 6 employees possessing licenses with the state of Florida to apply pesticides, as well as the necessary licenses from the state to apply as a company.

All Russell Landscape service teams mentioned above will be under the direct supervision of an Account Manager. He will serve as the main point of contact as well as be responsible for the coordination of all activities of Russell Landscape employees managing the landscape for Harbour Isles. The Account Manager will in turn report to his Branch Manager and our Chief Operating Officer. Any installation or renovation efforts will be handled by our Vice President of Construction and his group. This team of individuals will work seamlessly to ensure all quality expectations are being met and exceeded. Biographies are above.

**TRANSITION PLAN:****First 30 Days:**

- ❖ Conduct inspection of service location with Harbour Isles' team. Provide typed results of inspection with items to address within the first 30 days by Russell's operational team. Ensure all have a clear understanding of the primary concerns and expectations to ensure site improvement from day one.
- ❖ Russell's irrigation team will conduct a complete evaluation of any existing irrigation systems, checking irrigation heads, valves, controllers, and settings. Check to ensure each controller has automatic rain sensors and zone separation. Note irrigation issues such as broken heads, electrical issues, broken lateral lines or main lines. Provide the Harbour Isles team a detailed irrigation inspection report. Detailed irrigation mapping of the system showing main line shut offs, types of heads, zone coverage, and recommendations to improve/reduce water usage can be provided at an additional fee after system functionality has been restored.
- ❖ Obtain soil samples of turf from multiple areas for base line reading of pH and soil needs. Depending on soil test results update our recommended turf program for the coming year. Address any broad leaf weeds and grassy weeds in the turf and establish chemical plan for common areas based on existing stand of turf grass.
- ❖ Inspect planting beds, review mulching schedule, and address bare areas in the planting beds. Establish defined bed lines using bed line trencher and shovels incorporating all-natural areas and bare spots due to tree cover or other natural cause. Identify/address unsightly plants-and make recommendations, remove dying or dead plants and develop a replacement plan for Harbour Isles if desired.
- ❖ Seasonal color team to inspect all seasonal color beds, treat insect infested or diseased plants, apply fertilizer, and touch up with fresh mulch. Schedule a meeting with Harbour Isles' team to discuss spring color designs and goals for the future.
- ❖ International Society of Arboriculture (ISA) Certified Arborist to conduct a tree inspection, note pruning requirements, insect disease or fertility issues, and make recommendations to address any safety issues. Insure we have building clearance and security lights are not being obstructed by tree limbs.
- ❖ Begin building Integrated Pest Management (IPM) program.
- ❖ Provide Harbour Isles' leadership with our 24/7 contact information, including cell phone numbers and email addresses for contacting our managers in the event of an emergency.
- ❖ Take pictures of sites to document existing conditions and to demonstrate improvements moving forward.

## Russell Landscape

### First 60 days:

- ❖ Conduct our 2<sup>nd</sup> inspection with Harbour Isles' team to review prior month's results and insure all items have been addressed. Provide a written report and grade the property from an overall impression to determine focus for next 30 days.
- ❖ Make recommendations with cost estimates for enhancements to Harbour Isles team for budgeting purposes specifically looking for security issues and visual improvement. Intent is to ensure the overall safety and curb appeal of the campus with an agreed plan for execution with the Harbour Isles team.
- ❖ Follow up with our seasonal color designs for the next scheduled color install. Seasonal color team to have completed several inspections and treatments by this point. Evaluate progress and make necessary changes in protocol to get results expected.
- ❖ Evaluate turf quality and plant health, related to fertility, insect and disease and overall plant vigor. Make necessary changes to plant healthcare program of Integrated Pest Management (IPM) strategy to maximize plant and turf vigor.
- ❖ Continue to evaluate irrigation systems' operational performance. Provide recommendations to adjust systems operations based on input from maintenance team.

### First 90 days:

- ❖ Conduct our 3<sup>rd</sup> inspection with the Harbour Isles team, review previous property inspection to ensure all items have been addressed. Provide property inspection report and grade the property assessment.
- ❖ Monitor success of IPM system and modify as needed to insure plant and turf vigor.
- ❖ Seasonal color team to identify any beds in need of rework prior to the next change out so we capture as part of the planting for next season.



Russell Landscape

**REFERENCES:**

**Federation of Kings Point – Section 3**

Full-service landscape management of 19 neighborhood associations including 1,400+ homes  
1904 Clubhouse Dr, Sun City Center, FL 33573

Jack Davidson – Federation Board President

256-341-8613

[Jack0511@msn.com](mailto:Jack0511@msn.com)

Bev Weaver – Radison 1 Association President

813-337-8039

[Bw4230@gmail.com](mailto:Bw4230@gmail.com)

Bill Bussen – Southampton 2 Association President

630-306-4298

[bbussen3@yahoo.com](mailto:bbussen3@yahoo.com)

**Sun City West Master Association**

Full service landscape management - 45 acres of common areas.

Shawna Deiulio

813-955-6886

[Shawnaa@kpmaster.com](mailto:Shawnaa@kpmaster.com)

Russell Landscape

**Sandestin Owner’s Association – Letter from end of year one of service**

Approximately 2400 acres of managed landscape area

185 Grand Boulevard, Sandestin, FL 32550  
Rusty Decker, Landscape Committee Chair  
850-424-5955



185 Grand Blvd.  
PO Box 6868 Sandestin, FL 32550  
www.sandestinowners.com

November 16, 2012

Russell Landscape Group, Inc.  
Attn: Mr. Lee Padgett

Re: Performance Review

Dear Lee,

On behalf of the SOA Landscaping Committee and the Board of Directors, I would like to share our opinion of where we are with Russell Landscaping as we draw to a close of our first year of working together.

Given the less than ideal condition in which the property was transferred into your care, the most unusual winter, and the abnormally wet summer, all of us feel that we're off to a tremendous start. The property hasn't looked this good in several years.

While we are pleased to have achieved the savings that hiring Russell promised, I believe the biggest benefit that you have brought to the SOA is your solution based method of doing business. It has been a refreshing change to have fellow members remark about how nice the resort looks, instead of complaining about the landscaping.

We all look forward to the next four years – keep up the good work.

Please feel free to share these comments with everyone at Russell Landscape, as well as any business prospects you care to.

Sincerely,

Rusty Decker  
SOA Board Member  
Landscape Committee Chairman

Communications: 850.424.5955  
Customer Service: 850.424.5950  
ARB Administrator: 850.424.5930  
Accounting: 850.424.5940  
Security: 850.424.5933

Communications Fax: 850.424.5963  
Customer Service Fax: 850.424.5963  
ARB Fax: 850.424.5965  
Accounting Fax: 850.424.5964  
Security Fax: 850.424.5963

**Sandestin Owner’s Association – Letter from end of 2018 year of service**

Approximately 2400 acres of managed landscape area

Harbour Isles Community Development District

Russell Landscape

185 Grand Boulevard, Sandestin, FL 32550  
Kyle Ray, Director of Property Services  
850-424-5955



185 Grand Blvd.  
PO Box 6868 Sandestin, FL 32550  
T. 850.424.5960 | F. 850.424.5963  
www.sandestinowners.com  
January 3, 2018

Russell Landscape Group, Inc.  
Attn: Mr. Teddy Russell

Re: New Year

Dear Teddy,

The end of 2017 marked the sixth year of Russell Landscaping working in Sandestin. I wanted to let you know that in my twenty plus years with Sandestin, your company has been the most pleasurable to do business with. Russell Landscaping has given us top notch service at a very competitive price.

As you know, we have had much experience with nationwide landscaping firms and I have found that the family run nature of Russell Landscaping has been a most positive change. Your managers are all good at what they do and all show a positive attitude towards their work. I believe that speaks volumes to the type of culture you have in your business.

I also wanted to express my thanks for all the help that Russell Landscaping provided to us during this year's busy hurricane season. Our brushes with several of the tropical systems left quite a mess for your crews. Each time we got grazed, your guys came in like gangbusters and had everything cleaned up in rapid fashion. They also provided much appreciated assistance during our trouble with salt water getting into our irrigation ponds.

You have a great company and a great team; please keep up the good work.

Best regards,

A handwritten signature in black ink that reads "Kyle Ray".

Kyle Ray  
Director of Property Services



## **SIMILAR COMMUNITIES LIST**

**\*\*\*The following is not an all-inclusive list, but all have a similar annual contract value to the Harbour Isles CDDs, are similar product types, and is intended to verify our qualification\*\*\***

1. The Federation of Kings Point Associations – 3 years – Current
2. The Sandestin Owners Association – 10 years – Current
3. The Turnberry Owners Association – 8 years – Current
4. The Lake Lanier Islands Lodge & Resort – 6 years – Current
5. The Hilton Sandestin Beach Golf Resort & Spa – 4 years - Current
6. The Hamilton Mill Homeowners Association – 12 years – Current
7. The Windermere Homeowners Association – 12 years – Current
8. The Littlebrook Homeowners Association – 16 years - Current
9. The Ridge Homeowners Association – 5 years – Current
10. The River Club Homeowners Association – 5 years – Current
11. The Rivermoore Owners Association – 2 years – Current
12. The Soleil Laurel Canyon Community Association – 3 years – Current
13. The MorningView Homeowners Association – 2 years – Current
14. The Harbor Bay Community Development District – 1 year – Current
15. The Cumberland Community Improvement District – 10 years – Current
16. The Gwinnett Place Community Improvement District – 14 years – Current
17. The South Forsyth Community Improvement District – 1 year – Current
18. The Buckhead Community Improvement District – 1 year – Current
19. The Lilburn Community Improvement District – 3 years - Current
20. The Aerotropolis Community Improvement Districts – 4 years – Not Current
21. The North Fulton Community Improvement District – 8 years – Not Current
22. The Town Center Community Improvement District – 6 years – Not Current
23. The Sugarloaf Community Improvement District – 5 years – Current
24. The Evermore Community Improvement District – 6 years – Not Current
25. The Metro South Community Improvement District – 4 years – Current
26. The Upper Westside Community Improvement District – 3 years – Not current
27. The City of Atlanta – 4 years – Current
28. The City of Norcross – 1 years – Current
29. The City of Lawrenceville – 8 years – Current
30. The City of Alpharetta – 1 year – Current
31. The City of Savannah – 5 years – Current
32. The City of Hendersonville – 3 years - Current

## Russell Landscape

### **DESIGN CAPABILITIES:**

The Russell Landscape design department is dedicated to renovation and long-term master planning for our existing customer base. These services are typically provided at no charge to our maintenance customers as an added value to our partnership. The seamless process from design, to implementation, to maintenance allows us to move quickly, warranty all material, and provide the best solutions and highest level of quality to our partners. The Russell Landscape design department is currently staffed with 6 degreed landscape architects and led by Scott Tanner who is a registered Landscape Architect in Florida, Georgia, Tennessee, and South Carolina. Our team is capable of managing any project of any size from cradle to grave.

### **SEASONAL COLOR:**

Seasonal color design, installation, and maintenance are paramount to establishing the identity and distinction of all properties. At Russell Landscape we take this to heart and dedicate the necessary resources to ensure seamless communication through the design and installation process and methodically execute our well-honed maintenance and fertilization plan throughout the season to ensure our customers always look their best. Our full-time flower designer will set up a consultation prior to each seasonal rotation to discuss vision, theme, likes, dislikes, successes, and misses from previous years prior to generation of designs. A design will be drawn for each bed, once complete, a follow up meeting will be scheduled to review. After any necessary revisions and receiving final approval, our dedicated seasonal color crews will handle the installation. After installation, the care of the flowers is now in the hands of our specialized seasonal color management crews along with the oversight of our regular maintenance crews, supervisors, area managers, and executive team. A rigid fertilization schedule and bi-weekly maintenance visits to remove spent blooms, groom accent plants, remove any volunteer growth, and touch up mulch will ensure our success in presenting the best product available in the industry.

**REPORTS AND ACCOUNTABILITY:**

At Russell Landscape, we strive to provide both the highest level of available quality and customer service. To that end, we have several internal protocols in place to keep lines of communication open and keep the service level at its highest. We will conduct a monthly walk of the property with the property manager to evaluate the current condition of the grounds, look at possible enhancement projects, ensure any prior requests have been completed, and hopefully eliminate as many surprises as possible. A written report with photographs will be generated from the walk and distributed to the property manager that will serve as our marching orders for the next 30 days and can be used internally by the property manager to update property owners, tenants, and superiors on current conditions and upcoming plans. A sample of this report is below. Additionally, we conduct periodic internal scoring of each property that we then use to evaluate our teams, managers, and crew leaders. These scores are then used as teaching and motivational tools to inspire competition among our teams and give opportunities to celebrate successes. Between these two reporting methods, we ensure several sets of eyes are on each property monthly, proactive solutions are delivered quickly for any emerging issues, and consistent communication is achieved.



**SAMPLE MONTHLY REPORT:**



**The River Club Landscape Report**

**Thursday, April 18, 2019**

**8 Items Identified**



## Russell Landscape



### Item 1

Whitestone Way and Middle Fork Trail -  
Turf overall looks great.

Discuss with crew to fully remove grass  
clippings during cleanup.



### Item 2

Whitestone Way - Remove woody  
volunteers and control crack weeds.



### Item 3

Lochsa Lane - Start discussion to remove  
lower limbs that are unsightly. One option  
would be to continue Viburnum on  
opposite side of fence as a screen for  
Moore Rd.



## Russell Landscape



Item 4  
Moore Rd Entrance - Review azaleas that are defoliated and determine if these should be replaced.



Item 5  
Moore Rd - Remove general fallen limbs along natural area along sidewalk.



Item 6  
Moore Rd - Continue to control and eradicate Wisteria vines.



## Russell Landscape



### Item 7

Moore Rd - Control weeds populating in ground-cover with selective herbicide.

### Item 8

#### April Checklist

- + Apply fertilizer to Bermuda grass & Zoysia grass
- + Apply weed control to turf
- + Prune new growth on shrubs (as needed)
- + Start-up irrigation systems
- + Inspect trees, turf, shrubs for insects & disease, treat as needed
- + Start spring flower installation
- + Apply pre-emergent herbicide to Fescue in late April

Brandon Thomas  
Russell Landscape

**EQUIPMENT LIST:**

The following equipment and tools are available for utilization in the management of the Harbour Isles CDD grounds:

- eXmark 96-inch riding mowers
- eXmark 60-inch walk-behind mowers
- eXmark 48-inch walk-behind mowers
- eXmark 21-inch push mowers
- Stihl backpack blowers
- Stihl backpack sprayers
- Stihl weed-eaters
- Stihl stick edgers
- Stihl hedge trimmers
- Stihl gas shears
- Stihl pole chainsaws
- Stihl 21" chainsaws
- Honda pressure washer
- Ventrac aerator
- Little Wonder street blower
- Isuzu 1-ton trucks with 600-gallon spray rigs
- Isuzu 1-ton equipment trucks
- Bed-trenching machine
- Assorted hand tools, shovels, rakes, ladders, etc.

## Russell Landscape

### **SAFETY**

Russell Landscape has a moral and business obligation to provide a safe work environment for its employees, subcontractors, and the public. It is, therefore, the company's policy to abide by the Occupational Safety and Health Standards and to initiate and maintain appropriate practices that promote safety in the work environment.

All of our employees and subcontractors are required to attend a weekly safety program. All employees and Subcontractors are also given a company Safety Manual as well as Company Safety Rules upon hire, for their review and signature. These items include, but are not limited to:

- Safety Acknowledgement Form
- Highway Right of Way Safety Training
- Construction Jobsite Safety Rules
- Substance Abuse Policy
- Hazard Communication/ MSDS
- Regular Safety Training
- Fire Extinguisher Safety
- Fall Protection Safety
- Lawn Maintenance Safety
- Emergency Planning
- Ladder Safety
- Housekeeping/ Clean-up
- Electrical Safety
- Excavation and Trenching Safety
- Crane and Rigging Safety
- Vehicle Safety
- Accident Reporting

In addition, all employees are required to wear official Russell Landscape work shirts, khaki work pants, hard toe boots, yellow reflective logoed safety vests, and all appropriate PPE (Personal Protective Equipment) as determined by job specifics.



## **HIRING AND TRAINING PROCEDURES**

### **A. Hiring and Training Procedures**

#### **a. New Hire Procedure**

Once a potential candidate has expressed interest in working for Russell Landscape an application is completed and submitted to our Human Resources Manager and an interview is scheduled with the appropriate Branch or Account Manager. After an interview has been conducted and a job offer is extended and accepted, a Russell landscape hire packet is completed by the employee. This packet includes the following:

- i. All required state and federal tax documentation
- ii. I-9 employment eligibility paperwork and documentation
- iii. Drug screening consent
- iv. Background check consent
- v. Personal Protection Equipment Contract
- vi. Russell Landscape Safety Contract

#### **b. Team Member Training**

Russell Landscape prides itself on having the most qualified and well-trained staff of professional men and women in the industry. All Russell Landscape employees are required to complete a series of training programs at different milestones of their tenure starting from the very first day of employment and continuing throughout their careers with Russell.

#### **Initial Training:**

New employees are teamed with experienced Training Crew Leaders for their first 30 days of employment, regardless of their previous experience. During this initial period, newly hired individuals will be evaluated and taught the skillsets necessary to deliver Russell quality service. This includes but is not limited to:

- i. Proper use of safety equipment
- ii. Handling and usage of stick equipment such as edgers and weed eaters
- iii. Handling and usage of mowing equipment
- iv. Handling and usage of blowers
- v. Handling, storage and use of common herbicides and pesticides
- vi. Plant and turf identification
- vii. Proper pruning technique for the most common plant species

Once a newly hired team member has demonstrated proficiency in these areas he or she is then assigned to a permanent crew.

## Russell Landscape

### Ongoing Training:

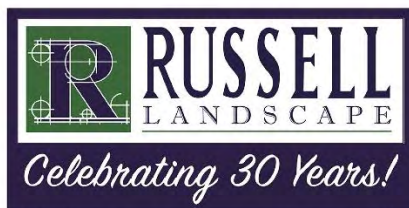
All team members are required to participate in ongoing training programs that focus on particular areas of landscape maintenance such as but not limited to:

- i. Advanced pruning techniques
- ii. Turf, shrub and plant disease and stress identification
- iii. Advanced pesticide, herbicide, and fungicide use
- iv. First-aid and CPR

### On Site Training:

Every property is different, and all Russell employees understand the importance of personalized service. Prior to any crew commencing service on any property of any kind, a thorough walk of the property is performed with the Crew Leader and the Account manager where all areas of special interest or special instructions are identified. The first 30 days of service on all new properties are governed by a specific set of guidelines pertaining to maintenance, irrigation, herbicide, pesticide, and fertilizer applications. Account Managers, Property Managers and Crew Leaders will be in very close contact to ensure that all obligations and expectations are met and exceeded.

# MAINTENANCE PERSONNEL UNIFORMS



## Official Maintenance Crew Uniform



Name Tag





Russell Landscape



**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)  
7/5/2023

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

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

<b>PRODUCER</b> Yates, LLC 2800 Century Parkway NE Suite 300 Atlanta GA 30345	<b>CONTRACT NAME</b> POLICY No. #404-633-4321      PER IAC No. 404-633-1312 FAX # E-MAIL # yates@yatesins.com
	<b>INSURERS AFFORDING COVERAGE</b>
<b>INSURED</b> Russell Landscape Florida, LLC 1002 East Shell Point Rd Ruskin FL 33570	INSURER A - Old Republic Insurance Company      NAIC # 26147
	INSURER B - Nautilus Insurance Company      17370
	INSURER C - Amersure Insurance Company      19488
	INSURER D - Amersure Mutual Insurance Company      23396
	INSURER E - INSURER F -

**COVERAGES**      **CERTIFICATE NUMBER:** 1870778918      **REVISION NUMBER:**

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

NO. / LTR.	TYPE OF INSURANCE	ADDITIONAL INFO / W/O	POLICY NUMBER	POLICY EFF. DATE (MM/DD/YYYY)	POLICY EXP. DATE (MM/DD/YYYY)	LIMITS
C	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GENL. AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PER OCC. <input checked="" type="checkbox"/> LOC <input type="checkbox"/> OTHER		CRP21180010261	7/1/2023	7/1/2024	EACH OCCURRENCE: \$ 1,000,000 DAMAGE TO RENTED PREMISES (Per occurrence): \$ 1,000,000 MED EXP (Any one person): \$ 10,000 PERSONAL & ADV INJURY: \$ 1,000,000 GENERAL AGGREGATE: \$ 2,000,000 PRODUCTS - COM-OR AGG: \$ 2,000,000 \$
C	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED <input type="checkbox"/> OTHER		DA 2118000001	7/1/2023	7/1/2024	COMBINED SINGLE LIMIT (Per occurrence): \$ 1,000,000 BODILY INJURY (Per person): \$ BODILY INJURY (Per occurrence): \$ PROPERTY DAMAGE (Per occurrence): \$ \$
D	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> PER. <input checked="" type="checkbox"/> RETENTION L.C.		GU 21180000200	7/1/2023	7/1/2024	EACH OCCURRENCE: \$ 5,000,000 AGGREGATE: \$ 5,000,000 \$
A	<input checked="" type="checkbox"/> <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY OCCUPATIONAL PARTNER/EXCLUSIVE OFFICER/EMPLOYEE EXCLUDED (Mandatory in FL) If yes, provide code: <input type="checkbox"/> Y <input checked="" type="checkbox"/> N <input type="checkbox"/> N/A DESCRIPTION OF OPERATIONS:		NWC31461023	7/1/2023	7/1/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> PER POLICY E.L. EACH OCCUR: \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE: \$ 1,000,000 E.L. DISEASE - POLICY LIMIT: \$ 1,000,000
B, C, D	B. Roadside Professional Liability C. Fire/Explosion/Explosion Risk D. Leased/Owned Equipment		CRP252433816 RM 211925A0201 CRP21180010261	7/1/2023 7/1/2023 7/1/2023	7/1/2024 7/1/2024 7/1/2024	\$1,000,000 Agg Ded \$1,000 Ded \$1,000 \$75,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 Subject to policy terms, conditions, forms and exclusions, the insurance coverage afforded by the policies above include the following when required by written contract for the certificate holder and/or entities listed below. Blanket Additional Insured in regards to General Liability for ongoing and completed operations, Leased/Rented Equipment, Owner, Lessor or Manager of Premises, Automobile Liability and Umbrella Liability; Blanket Primary & Noncontributory in regards to General Liability, Automobile Liability and Umbrella Liability; Blanket Waiver of Subrogation in regards to General Liability, Automobile Liability, Workers Compensation and Umbrella Liability. Per Project Aggregate and Per Location Aggregate applies to the General Liability.

FORMS:  
See Attached.

<b>CERTIFICATE HOLDER</b>  **For Information Only**	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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AGENCY CUSTOMER ID: RUSSCO01-C

LOC #:



**ADDITIONAL REMARKS SCHEDULE**

Page 1 of 1

AGENCY Yates, LLC		NAMED INSURED Russell Landscape Florida, LLC 1002 East Shell Point Rd. Ruskin FL 33570	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	BASIC CODE		

**ADDITIONAL REMARKS**

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,  
 FORM NUMBER: 25 FORM TITLE: CERTIFICATE OF LIABILITY INSURANCE

CG7048 10/15 - Contractor's Blanket Additional Insured Endorsement - Form A  
 CG7049 04/17 - Contractor's General Liability Extension Endorsement  
 CA7115 11/09 - Advantage Commercial Automobile Broad Form Endorsement  
 CA7165 09/11 - Designated Insured-Primary Non-Contributory Coverage When Required by Insured Contract or Cert  
 CUD57102 04/14 - Schedule of Underlying Insurance  
 CU7467 11/07 - Blanket Additional Insured - Primary/Non-Contributory Coverage  
 CU2403 06/00 - Waiver Of Transfer Of Rights Of Recovery Against Others To Us  
 WC000313 04/84 - Waiver of Our Right to Recover from Others Endorsement

Form **W-9**  
(Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

### Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**Russell Landscape Florida, LLC**

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.  
 Individual/sole proprietor or single-member LLC  
 C Corporation  
 S Corporation  
 Partnership  
 Trust/estate  
 Limited liability company. Enter the tax classification (C-C corporation, S-S corporation, P-Partnership) **P**  
Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.  
 Other (see instructions) **P**

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  
 Exempt payee code (if any) \_\_\_\_\_  
 Exemption from FATCA reporting code (if any) \_\_\_\_\_  
(FATCA is acronym for Foreign Account Tax Compliance Act. See LLC.)

5 Address (number, street, and apt. or suite no.) See instructions.  
**PO Box 63104**

6 City, state, and ZIP code  
**Charlotte, NC 28263-3104**

7 List account number(s) here (optional)

Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see What Name and Number To Give the Requester for guidelines on whose number to enter.

Social security number  
 \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

or  
 Employer identification number  
 4 5 - 3 6 9 3 5 2 7

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person **Judd P. B...** Date **01-04-2023**

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1098-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



Russell Landscape



# State of Florida Department of State

I certify from the records of this office that RUSSELL LANDSCAPE FLORIDA, LLC is a limited liability company organized under the laws of the State of Florida, filed on October 27, 2011, effective October 27, 2011.

The document number of this limited liability company is L11000122917.

I further certify that said limited liability company has paid all fees due this office through December 31, 2021, that its most recent annual report was filed on January 18, 2021, and that its status is active.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Eighteenth day of January,  
2021*



*Ronald R. Lee*  
Secretary of State

Tracking Number: 0928938889CC  
To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.  
<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>



# Department of Environmental Protection

2600 Blair Stone Road, M.S. 3570  
Tallahassee, Florida 32399-2400



GI-BMP Trainee ID: **GV915774**  
Certification date: **2/3/2021**

Congratulations on successfully completing the Florida Green Industries Best Management Practices Training Program. Your certificate of completion and wallet card are attached. If there are errors in the certificate, or if we can be of further assistance, please contact the GI-BMP Office of the UF/IFAS Florida-Friendly Landscaping™ Program at [gi.bmp@ifas.ufl.edu](mailto:gi.bmp@ifas.ufl.edu) or (352) 273-4517.

Please note that this training certificate alone does not authorize you to apply fertilizer commercially. You must take additional steps to become licensed for commercial fertilizer application in the state of Florida. The Limited Urban Commercial Fertilizer Applicator Certification (state "fertilizer license") is issued by the Florida Department of Agriculture and Consumer Services (FDACS).

Apply online: <https://aesecomm.freshfromflorida.com>. The certificate number from this document is required to apply for Fertilizer Applicator Certification. For assistance contact: The Bureau of Licensing and Enforcement, (850) 617-7997

If your test score is 90% or greater, you may be eligible to become a GI-BMP Instructor:  
[http://ffl.ifas.ufl.edu/professionals/instructor\\_program.html](http://ffl.ifas.ufl.edu/professionals/instructor_program.html)

**Test Score: 85%**

State of Florida  
DEPARTMENT OF  
ENVIRONMENTAL PROTECTION

William Henry Dutton III

**William Henry Dutton III**

GV915774-1

Certificate #

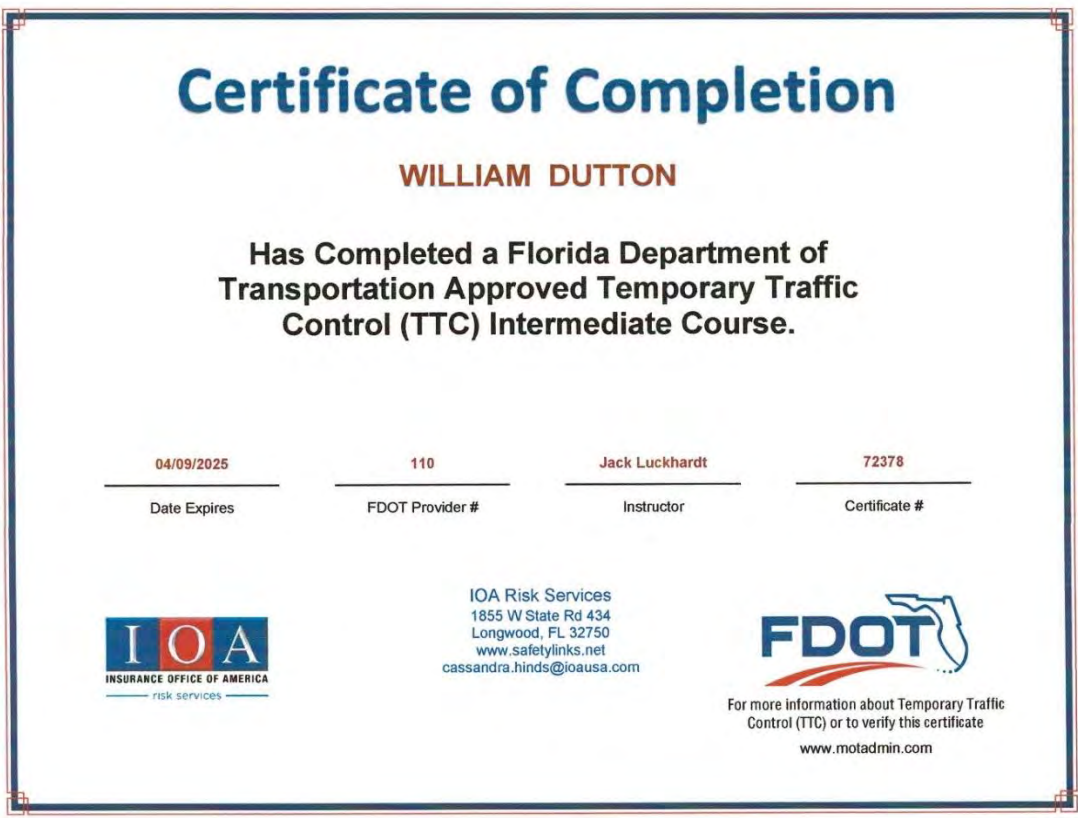
GV915774

Trainee ID #

GREEN INDUSTRIES BEST MANAGEMENT PRACTICES  
TRAINING PROGRAM







**FNGLA Certificate of Completion**

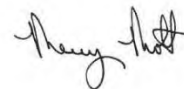
for

**William Dutton**

For Completion of

**FCHP Practice Test Central Florida**

Completed: 2/12/2021



FNGLA Director of Industry Certifications

**Harbour Isles Community Development District**

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**Official Proposal Form for  
Solicitation of Proposals for Landscape and Irrigation Maintenance Services**

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Name of Proposer: Russell Landscape Florida, LLC

In accordance with the solicitation of proposals issued by the Harbour Isles Community Development District the undersigned proposes to provide all work necessary to perform the scope of services as described in the Project Manual.

Proposer submits that it can perform the work described above summarized as follows and as more specifically described in Proposer’s proposal:

1. Turf Maintenance	\$ <u>79,200.00</u>
2. Shrub and Groundcover Maintenance	\$ <u>31,680.00</u>
3. Tree Maintenance	\$ <u>10,000.00</u>
4. General Site Maintenance: Trash and Debris Disposal	\$ <u>28,800.00</u>
5. Irrigation System	\$ <u>17,340.00</u>

---

<b>Total Yearly Cost for the first year of the above items</b>	\$ <u>167,020.00</u>
<b>Year 2</b>	\$ <u>172,200.00</u>
<b>Year 3</b>	\$ <u>177,540.00</u>
<b>3- Year Grand Total</b>	\$ <u>183,000.00</u>

---

6. Mulching for Tree and Shrub/Groundcover Bed Areas	\$ <u>20,475.00</u>
--	---------------------

*Estimate of total cubic yards proposed to service the property:* 325

*Cost of Mulch Per Cubic Yard* \$ 65.00

*Irrigation Hourly Rate for items not included in the Scope of Services:* \$ 180.00 (2 person team)

Proposer, thoroughly reviewed all components of the Project Manual and has a thorough understanding of the work required, the site and conditions where the work is to be performed, local labor conditions and all laws, regulations and other factors affecting performance of the work, having knowledge of the expense and difficulties attending performance of the work, and having fully inspected the site in all particulars, hereby proposes and agrees, if Proposer’s proposal is accepted, to enter into the Proposed Agreement with the District.

Name of Authorized Signatory of Proposer: William Russell, II

Title of Authorized Signatory of Proposer: CEO

Signature of Authorized Signatory of Proposer: 

**Affidavit for  
Public Entity Crimes, Scrutinized Companies, E-Verify, and Non-Collusion**

*[Solicitation of Proposals for Landscape and Irrigation Maintenance Services]  
Harbour Isles Community Development District*

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

Name of Proposer: Russell Landscape Florida, LLC

I am authorized to make this affidavit on behalf of my firm and its owner, directors and officers. I state that:

**Public Entity Crimes**

1. I understand that a “person” or “affiliate” who has been placed on the “convicted vendor list” following a “conviction” for a “public entity crime” (as those terms are defined in Section 287.133, Florida Statutes) for a period of 36 months following the date of being placed on the convicted vendor list, would render us ineligible to submit a proposal for this project.
2. Neither I, nor any person or affiliates with my firm, nor my firm has been placed on the convicted vendor list following a conviction for a public entity crime that would render us ineligible to submit a proposal for this project.

**Scrutinized Companies**

3. I understand that, pursuant to Section 287.135(2)(a), Florida Statutes, we would be ineligible to submit a proposal for this project if we are company that is on the “Scrutinized Companies that Boycott Israel List” (created pursuant to Section 215.4725, Florida Statutes) or are engaged in a boycott of Israel.
4. Neither I nor my firm are on the “Scrutinized Companies that Boycott Israel List” nor are we engaged in a boycott of Israel.

**E-Verify**

5. I understand that, pursuant to Section 448.095(2), Florida Statutes, we must comply with Florida’s E-Verify law in order to enter into an agreement with a public employer.
6. Our firm is registered with and uses the United States Department of Homeland Security’s E-Verify system to verify the work authorization status of all employees hired on or after January 1, 2021.
7. No public employer has terminated a contract with our firm under Section 448.095(2)(c), Florida Statutes, within the year immediately preceding the date of our proposal.
8. Our firm is currently in compliance and will remain in compliance, for the duration of the agreement, with all requirements of Section 448.095(2), Florida Statutes.
9. I understand that, if there is a good faith belief that our firm has knowingly violated Section 448.09(1), Florida Statutes, there is an obligation to terminate the agreement pursuant to Section 448.095(2)(c), Florida Statutes.
10. I understand that, if there is a good faith belief that one of our subcontractor(s) has knowingly violated the Section 448.09(1), Florida Statutes, but our firm has otherwise complied with its obligations thereunder, then our firm will be required to immediately terminate its contract with the subcontractor in order to continue providing services to a public employer.

**Non-Collusion**

11. The price(s) and amount(s) of in our proposal have been arrived at independently and without consultation, communication, or agreement with any other proposer, potential proposer, proposal, or



potential proposal.

- 12. Neither the price(s) nor the amount(s) in our proposal, have been disclosed to any other firm or person who is a proposer or potential proposer, and they will not be disclosed before opening of all proposals.
- 13. No attempt has been made or will be made to induce any firm or persons to refrain from submitting a proposal, or to submit a price(s) higher than the prices in our proposal, or to submit any intentionally high or noncompetitive price(s) or other form of complementary proposal.
- 14. Our proposal is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- 15. Our firm, its affiliates, subsidiaries, officers, director, and employees are not currently under investigation, by any governmental agency and have not in the last 3 years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to any public contract, except as disclosed.

I state that I and the named firm understand and acknowledge that the above representations are material and important, and will be relied on by the Harbour Isles Community Development District for which our proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is, and shall be treated as, fraudulent concealment from the District of the true facts relating to the submission of proposals for this work.

\_\_\_\_\_  
Signature of Authorized Signatory of Proposer

Sworn before me on August 14, 2023

\_\_\_\_\_  
Notary Public Signature



\_\_\_\_\_  
Notary Stamp

# **Section 5**

## **Budget Hearing**

# **Subsection 5A**

# **Proposed Budget**



HARBOUR ISLES  
Community Development District

*Annual Operating and Debt Service Budget*  
Fiscal Year 2024

Modified Tentative Budget  
(Printed 8/10/23, Version 6)

Prepared by:



HARBOUR ISLES  
Community Development District

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Harbour Isles  
**Community Development District**

**Operating Budget**  
Fiscal Year 2024



**Summary of Revenues, Expenditures and Changes in Fund Balances**  
Fiscal Year 2024 Modified Tentative Budget

ACCOUNT DESCRIPTION	ACTUAL	ACTUAL	ADOPTED	ACTUAL	PROJECTED	TOTAL	ANNUAL
	FY 2021	FY 2022	BUDGET FY 2023	THRU JUL-2023	AUG- SEP-2023	PROJECTED FY 2023	BUDGET FY 2024
<b>REVENUES</b>							
Interest - Investments	\$ 1,070	\$ 2,783	\$ 1,133	\$ 19,772	\$ 3,954	\$ 23,726	\$ 5,000
Interest - Tax Collector	309	-	-	570	-	570	-
Rental Income	25,934	23,344	16,000	33,600	6,720	40,320	16,000
Special Assmnts- Tax Collector	702,271	786,839	944,189	944,188	-	944,188	1,024,864
Special Assmnts- Delinquent	2,479	-	-	-	-	-	-
Special Assmnts- Discounts	(26,884)	(29,853)	(37,768)	(36,046)	-	(36,046)	(40,995)
Other Miscellaneous Revenues	3,352	8	500	76	15	91	500
Facility Revenue	406	139	200	100	20	120	200
<b>TOTAL REVENUES</b>	<b>708,937</b>	<b>783,260</b>	<b>924,254</b>	<b>962,260</b>	<b>10,710</b>	<b>972,970</b>	<b>1,005,569</b>
<b>EXPENDITURES</b>							
<i>Administrative</i>							
P/R-Board of Supervisors	10,000	11,400	12,000	9,600	2,000	11,600	12,000
FICA Taxes	627	872	918	734	153	887	918
ProfServ-Arbitrage Rebate	500	600	600	-	600	600	600
ProfServ-Engineering	19,790	23,089	20,000	21,304	4,261	25,565	20,000
ProfServ-Legal Services	17,722	20,613	20,000	16,923	3,385	20,308	20,000
ProfServ-Mgmt Consulting	43,764	46,299	50,003	41,669	8,334	50,003	51,504
ProfServ-Special Assessment	5,000	5,000	5,000	5,000	-	5,000	5,000
ProfServ-Trustee Fees	3,233	2,290	3,233	3,367	-	3,367	3,500
Auditing Services	3,526	4,100	4,200	3,700	-	3,700	3,700
Website Hosting/Email services	2,502	2,455	4,000	1,552	927	2,479	4,000
Postage and Freight	-	502	500	254	51	305	500
Insurance - General Liability	-	3,034	3,337	3,337	-	3,337	7,000
Public Officials Insurance	2,960	-	3,256	3,291	-	3,291	3,620
Legal Advertising	2,976	3,776	1,000	2,549	510	3,059	1,000
Misc-Assessment Collection Cost	2,589	9,206	18,884	18,163	-	18,163	20,497
Bank Fees	932	505	500	866	173	1,039	1,000
Misc-Web Hosting	-	-	1,000	375	150	525	900
Miscellaneous Expenses	4,102	474	500	657	131	788	1,600
Annual District Filing Fee	-	175	175	175	-	175	175
<b>Total Administrative</b>	<b>125,148</b>	<b>134,390</b>	<b>149,106</b>	<b>133,516</b>	<b>20,674</b>	<b>154,190</b>	<b>157,514</b>
<i>Electric Utility Services</i>							
Electricity - Streetlights	108,648	124,067	120,000	99,125	19,825	118,950	132,000
Utility Services	11,852	20,710	22,000	18,327	3,665	21,992	25,000
<b>Total Electric Utility Services</b>	<b>120,500</b>	<b>144,777</b>	<b>142,000</b>	<b>117,452</b>	<b>23,490</b>	<b>140,942</b>	<b>157,000</b>
<i>Garbage/Solid Waste Services</i>							
Garbage - Recreation Facility	1,892	2,228	2,500	3,384	737	4,121	4,000
<b>Total Garbage/Solid Waste Services</b>	<b>1,892</b>	<b>2,228</b>	<b>2,500</b>	<b>3,384</b>	<b>737</b>	<b>4,121</b>	<b>4,000</b>
<i>Water-Sewer Comb Services</i>							
Utility Services	3,339	3,026	6,000	2,481	496	2,977	6,000
<b>Total Water-Sewer Comb Services</b>	<b>3,339</b>	<b>3,026</b>	<b>6,000</b>	<b>2,481</b>	<b>496</b>	<b>2,977</b>	<b>6,000</b>

**Summary of Revenues, Expenditures and Changes in Fund Balances**  
Fiscal Year 2024 Modified Tentative Budget

ACCOUNT DESCRIPTION	ACTUAL	ACTUAL	ADOPTED	ACTUAL	PROJECTED	TOTAL	ANNUAL
	FY 2021	FY 2022	BUDGET	THRU	AUG-	PROJECTED	BUDGET
	FY 2021	FY 2022	FY 2023	JUL-2023	SEP-2023	FY 2023	FY 2024
<b>Stormwater Control</b>							
Midge Fly Treatment	-	-	8,000	-	8,000	8,000	8,000
R&M-Stormwater System	40	40	500	-	500	500	500
R&M-Wetland Monitoring	7,224	8,700	8,700	7,250	1,450	8,700	8,700
R&M Lake & Pond Bank	9,611	18,752	50,000	100,400	20,080	120,480	75,000
Fountain Maintenance	3,841	2,381	2,328	2,194	749	2,943	2,700
Aquatic Maintenance	27,058	25,704	25,704	22,920	4,284	27,204	25,704
Aquatic Plant Replacement	730	2,870	2,500	-	2,500	2,500	2,500
<b>Total Stormwater Control</b>	<b>48,504</b>	<b>58,447</b>	<b>97,732</b>	<b>132,764</b>	<b>37,563</b>	<b>170,327</b>	<b>123,104</b>
<b>Other Physical Environment</b>							
Insurance - Property	27,705	23,275	25,603	25,693	-	25,693	28,262
Insurance - General Liability	3,498	3,586	3,945	3,876	-	3,876	-
Insurance - Flood	-	3,331	-	-	-	-	3,000
R&M-Other Landscape	10,290	2,244	-	-	-	-	-
R&M-Irrigation	14,104	25,832	20,000	5,325	1,065	6,390	40,000
Landscape Maintenance	96,485	90,749	150,000	81,102	20,654	101,756	150,000
Landscape Replacement	6,643	26,914	20,000	21,666	4,333	25,999	26,000
Landscape Replacement-Annuals	-	-	6,000	-	6,000	6,000	-
Annual Mulching	-	17,457	20,000	15,500	-	15,500	20,000
Entry & Walls Maintenance	4,398	-	4,000	-	4,000	4,000	4,000
Misc-Hurricane Expense	-	-	-	14,516	-	14,516	-
Holiday Lighting & Decorations	-	-	2,000	-	2,000	2,000	2,000
<b>Total Other Physical Environment</b>	<b>163,123</b>	<b>193,388</b>	<b>251,548</b>	<b>167,678</b>	<b>38,052</b>	<b>205,730</b>	<b>273,262</b>
<b>Security Operations</b>							
Contracts-Security Services	10,212	10,743	30,636	12,984	6,145	19,129	30,636
R&M-Security Cameras	1,417	-	1,000	612	122	734	1,500
Guard & Gate Facility Maintenance	9,146	1,630	3,000	3,943	789	4,732	3,000
Miscellaneous Expenses	12,362	1,262	-	-	-	-	-
<b>Total Security Operations</b>	<b>33,137</b>	<b>13,635</b>	<b>34,636</b>	<b>17,539</b>	<b>7,056</b>	<b>24,595</b>	<b>35,136</b>
<b>Contingency</b>							
Miscellaneous Expenses	126	2,620	15,500	10,680	4,820	15,500	15,871
<b>Total Contingency</b>	<b>126</b>	<b>2,620</b>	<b>15,500</b>	<b>10,680</b>	<b>4,820</b>	<b>15,500</b>	<b>15,871</b>
<b>Parks and Recreation</b>							
ProfServ-Pool Maintenance	12,775	10,800	10,800	12,060	2,360	14,420	14,000
Field Services	-	3,900	7,800	6,500	1,300	7,800	7,800
Clubhouse - Facility Janitorial Service	5,725	5,400	5,400	9,385	1,590	10,975	9,000
Lighting Replacement	4,777	6,743	6,000	-	6,000	6,000	6,000
Contracts-Mgmt Services	94,335	98,812	121,624	91,630	18,326	109,956	125,272
Contracts-Pest Control	1,896	1,896	2,000	1,628	316	1,944	2,000
Telephone/Fax/Internet Services	4,679	6,062	5,109	5,652	562	6,214	5,109
R&M-Pools	-	475	1,500	-	1,500	1,500	1,500
R&M-Fitness Equipment	1,748	1,976	2,500	4,174	210	4,384	2,500
R&M-Dock	1,400	1,301	500	-	500	500	-
Maintenance & Repairs	35,335	35,991	50,000	56,916	1,500	58,416	50,000
Athletic/Park Court/Field Repairs	-	-	500	-	500	500	-
Furniture Repair/Replacement	-	-	5,000	12,848	1,000	13,848	5,000

**Summary of Revenues, Expenditures and Changes in Fund Balances**  
Fiscal Year 2024 Modified Tentative Budget

ACCOUNT DESCRIPTION	ACTUAL	ACTUAL	ADOPTED	ACTUAL	PROJECTED	TOTAL	ANNUAL
	FY 2021	FY 2022	BUDGET FY 2023	THRU JUL-2023	AUG- SEP-2023	PROJECTED FY 2023	BUDGET FY 2024
Trail/Bike Path Maintenance	-	-	500	4,680	200	4,880	-
Playground Equipment and Maintenance	-	850	1,000	-	1,000	1,000	-
Access Control	-	864	500	312	188	500	1,000
Miscellaneous Expenses	6,189	2,670	-	-	-	-	-
Office Supplies	5,230	4,637	2,500	970	194	1,164	2,500
Dog Waste Station Supplies	1,193	1,366	2,000	1,421	284	1,705	2,000
<b>Total Parks and Recreation</b>	<b>175,282</b>	<b>183,743</b>	<b>225,233</b>	<b>208,176</b>	<b>37,530</b>	<b>245,706</b>	<b>233,681</b>
<b>TOTAL EXPENDITURES</b>	<b>671,051</b>	<b>736,254</b>	<b>924,255</b>	<b>793,670</b>	<b>170,419</b>	<b>964,089</b>	<b>1,005,569</b>
Excess (deficiency) of revenues							
Over (under) expenditures	37,886	47,006	-	168,590	(159,709)	8,880	-
<b>OTHER FINANCING SOURCES (USES)</b>							
Operating Transfers-Out	-	-	-	(15,000)	-	(15,000)	-
Contribution to (Use of) Fund Balance	-	-	-	-	-	-	-
<b>TOTAL OTHER SOURCES (USES)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(15,000)</b>	<b>-</b>	<b>(15,000)</b>	<b>-</b>
Net change in fund balance	37,886	47,006	-	153,590	(159,709)	(6,120)	-
<b>FUND BALANCE, BEGINNING</b>	<b>227,144</b>	<b>265,030</b>	<b>312,038</b>	<b>312,038</b>	<b>-</b>	<b>312,038</b>	<b>305,918</b>
<b>FUND BALANCE, ENDING</b>	<b>\$ 265,030</b>	<b>\$ 312,036</b>	<b>\$ 312,038</b>	<b>\$ 465,628</b>	<b>\$ (159,709)</b>	<b>\$ 305,918</b>	<b>\$ 305,918</b>



HARBOUR ISLES  
Community Development District

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**Exhibit "A"**  
Allocation of Fund Balances

**AVAILABLE FUNDS**

	<u>Amount</u>
Beginning Fund Balance - Fiscal Year 2024	\$ 305,918
Net Change in Fund Balance - Fiscal Year 2024	-
Reserves - Fiscal Year 2024 Additions	-
<b>Total Funds Available (Estimated) - 9/30/2024</b>	<b>305,918</b>

**ALLOCATION OF AVAILABLE FUNDS**

***Nonspendable Fund Balance***

Deposits	18,687
Subtotal	<u>18,687</u>

***Assigned Fund Balance***

Operating Reserve - First Quarter Operating Capital	251,392 <sup>(1)</sup>
Subtotal	<u>251,392</u>

<b>Total Allocation of Available Funds</b>	<b>270,079</b>
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<b>Total Unassigned (undesignated) Cash</b>	<b>\$ <u>35,839</u></b>
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**Notes**

(1) Represents approximately 3 months of operating expenditures

**Budget Narrative**  
Fiscal Year 2024

**REVENUES**

**Interest-Investments**

The District earns interest on the monthly average collected balance for their money market accounts.

**Rental Income**

The District may receive monies for event rentals such as weddings, birthday parties, etc.

**Special Assessments-Tax Collector**

The District will levy a Non-Ad Valorem assessment on all sold and platted parcels (using the uniform method) within the District in order to pay for the operating expenditures during the Fiscal Year.

**Special Assessments-Discounts**

Per Section 197.162 and Section 197.3632 of the Florida Statutes, discounts are allowed for early payments of assessments collected by the Tax Collector and only when the Tax Collector is using the uniform methodology. The budgeted amount for the fiscal year is calculated at 4% of the anticipated Non-Ad Valorem assessments.

**Other Miscellaneous Revenues**

The District may receive monies for the sale or provision of electronic access cards, entry decals, etc.

**Facilities Rentals**

The District may receive monies for the rental of certain facilities by outside sources, for such items as office space, snack bar/restaurants, etc.

**EXPENDITURES**

**Administrative.**

**P/R-Board of Supervisors**

Chapter 190 of the Florida Statutes allows for members of the Board of Supervisors to be compensated \$200 per meeting at which they are in attendance. The amount for the Fiscal Year is based upon all supervisors attending all meetings. FICA Taxes are calculated at 7.65% of gross payroll.

**Professional Services-Arbitrage Rebate**

The District contracted with an independent professional firm to annually calculate the District's Arbitrage Rebate Liability on its bonds

**Professional Services-Engineering**

The District's engineer provides general engineering services to the District, i.e. attendance and preparation for board meetings when requested, review of invoices, and other specifically requested assignments.

**Professional Services-Legal Services**

The District's attorney provides general legal services to the District, i.e., attendance and preparation for Board meetings, review of contracts, agreements, resolutions and other research as directed or requested by the BOS District Manager.

**Budget Narrative**  
Fiscal Year 2024

**EXPENDITURES**

**Administrative (cont'd)**

**Professional Services-Management Consulting Services**

The District receives Management, Accounting and Administrative services as part of a Management Agreement with Inframark Infrastructure Management Services. Inframark manages all of the District's financial activities such as accounts payable, financial statements, auditing and budgeting in accordance with the management contract in effect.

**Professional Services-Special Assessment**

This is the Administrative fees to prepare the District's special assessment roll.

**Professional Services-Trustee Fees**

The District pays US Bank an annual fee for trustee services on the Series 2015 Special Assessment Bond. The budgeted amount for the fiscal year is based on standard fees charged plus any out-of-pocket expenses.

**Auditing Services**

The District is required to conduct an annual audit of its financial records by an Independent Certified Public Accounting Firm. The budgeted amount for the fiscal year is based on contracted fees from an existing engagement letter.

**Website Hosting/Email Services**

The cost of web hosting and regular maintenance of the District's website by Inframark Infrastructure Management Services.

**Postage and Freight**

Actual postage and/or freight used for District mailings including agenda packages, vendor checks and other correspondence.

**Insurance-General Liability**

The District's General Liability & Public Officials Liability Insurance policy is with Public Risk Insurance Agency, Inc. They specialize in providing governmental insurance coverage. The budgeted amount projects a 10% increase in the premium.

**Legal Advertising**

The District is required to advertise various notices for Board meetings and other public hearings in a newspaper of general circulation.

**Miscellaneous-Assessment Collection Costs**

The District reimburses the Tax Collector for necessary administrative costs. Per the Florida Statutes, administrative costs shall include, but not be limited to, those costs associated with personnel, forms, supplies, data processing, computer equipment, postage, and programming. The District also compensates the Tax Collector for the actual cost of collection or 2% on the amount of special assessments collected and remitted, whichever is greater. The assessment collection cost is based on a maximum of 2% of the anticipated assessment collections.

**Bank Fees**

In the rare event of bank service charges from operating or money market accounts, the cost will be assigned here.



**Budget Narrative**  
Fiscal Year 2024

**EXPENDITURES**

**Administrative (cont'd)**

**Miscellaneous-Web Hosting**

The District incurs the cost of owning the Harbour Isles CDD web domain.

**Miscellaneous Expenses**

Additional expenses incurred by the District.

**Annual District Filing Fee**

The District is required to pay an annual fee of \$175 to the Department of Economic Opportunity Division of Community Development.

**Field**

**Electric Utility Services**

**Electricity – Streetlights**

The District may have expenditures relating to streetlights throughout the community. These may be restricted to main arterial roads or in some cases, to all streetlights within the District's boundaries.

**Utility Services**

The District will incur electric utility expenditures for general purposes such as irrigation timers, lift station pumps, fountains, etc.

**Garbage/Solid Waste Services**

**Garbage – Recreation Facility**

The District will incur expenditures related to the removal of garbage and solid waste.

**Midge Fly Treatment**

The District may incur expenses for midge fly treatments throughout the year.

**R&M- Stormwater System**

The District may incur expenses for the repair and maintenance of the stormwater system.

**R&M-Wetland Monitoring**

The District may be required to provide for certain types of monitoring and maintenance activities for various wetlands and waterways by other governmental entities. The District may also be required to provide for certain types of monitoring and maintenance activities for various mitigation areas by other governmental entities

**Budget Narrative**  
Fiscal Year 2024

**EXPENDITURES**

**Water-Sewer Comb Services**

**Utility Services**

The District will incur water/sewer utility expenditures related to District operations.

**Stormwater Control**

**R&M Lake & Pond Bank**

The District may incur expenditures to maintain lake banks for the ponds and lakes within the District's boundaries, along with planting of beneficial aquatic plants, stocking of fish, mowing and landscaping of the banks as the District determines necessary.

**Fountain Maintenance**

The District may incur expenses related to maintaining the aeration and fountains.

**Aquatic Maintenance**

Expenses related to the care and maintenance of the lakes and ponds for the control of nuisance plant and algae species.

**Aquatic Plant Replacement**

The expenses related to replacing beneficial aquatic plants, which may or may not have been required by other governmental entities.

**Other Physical Environment**

**Insurance – Property**

The District will incur fees to insure items owned by the district for its property needs.

**Insurance – General Liability**

The District's General Liability & Public Officials Liability Insurance policy is with Public Risk Insurance Agency, Inc. They specialize in providing governmental insurance coverage. The budgeted amount projects a 10% increase in the premium.

**R&M- Irrigation**

This is for any repair and maintenance expenses pertaining to the District's irrigation that are not covered in the contract.

**R&M- Landscape Renovations**

The District may incur expenses for repair and maintenance for landscape renovation.

**Landscape Maintenance**

The District will incur expenditures to maintain the rights-of-way, median strips, recreation facilities including pond banks, entryways, and similar planting areas within the District. These services include, but are not limited to, monthly landscape maintenance, fertilizer, pesticides, annuals, mulch and irrigation repairs.

**Budget Narrative**  
Fiscal Year 2024

**EXPENDITURES**

**Other Physical Environment – cont'd**

**Landscape Replacement**

The District will incur expenses for the landscape replacement of annuals, perennials and shrubberies.

**Landscape Replacement - Annuals**

The District will incur expenses for the installation of annuals.

**Annual Mulching**

The District will incur expenses for annual mulching.

**Entry & Walls Maintenance**

The District will incur expenditures to maintain the entry monuments and the fencing.

**Holiday Lighting & Decorations**

The District will incur expenses for holiday lighting and decoration.

**Security Operations**

**Contracts – Security Services**

The District will incur expenditures for the quarterly video monitoring services.

**R&M- Security Cameras**

The District may incur expenses for the repair and maintenance of the security monitoring cameras.

**Guard & Gate Facility Maintenance**

The District may incur any ongoing gate repairs and maintenance.

**Contingency**

**Miscellaneous Expenses**

Monies collected and allocated for expenses that the District could incur throughout the year, which may not fit into any standard categories.

**Parks and Recreation**

**ProfServ-Pool Maintenance**

Expenses related to the maintenance of swimming pools and other water features.

**Clubhouse- Facility Janitorial Service**

Expenses related to the cleaning of the facility including supplies.

**Lighting Replacement**

Expenses for the replacement of lighting throughout the park and recreational area.



**Budget Narrative**  
Fiscal Year 2024

**EXPENDITURES**

**Parks and Recreation – cont'd**

**Contracts – Mgmt Services**

The District may incur expenses for employees//staff members needed for the recreational facilities such as Clubhouse Staff.

**Contract – Pest Control**

Monthly service for the control of rodents and general pests.

**Telephone/Fax/Internet Services**

The District may incur telephone, fax and internet expenses related to the recreational facilities.

**R&M Pools**

Expenses related to the repair of swimming pools and other water features.

**R&M Fitness Equipment**

Quarterly preventative maintenance of fitness equipment.

**R&M Dock**

The District may incur expenses for the repair and maintenance of the dock, ie. Pressure washing and sealing.

**Maintenance & Repairs**

The District may incur expenses to maintain its recreation facilities.

**Athletic/Park Court/Field Repairs**

Expenses related to any facilities, such as tennis, basketball, etc.

**Furniture Repair/Replacement**

The District may incur expenses for the repair or replacement of furniture in the recreation facilities.

**Trail/Bike Path Maintenance**

Expenses related to various types of trail or pathway systems the District may own, from hard surface to natural surfaces.

**Playground Equipment and Maintenance**

The District may incur expenses for the maintenance of the playground equipment.

**Access Control**

The District may incur expenses for access control.

**Office Supplies**

The District may have an office in its facilities which require various office related supplies.

**Dog Waste Station Supplies**

Expenses for the supplies for the dog waste station in the recreational section.

**Summary of Revenues, Expenditures and Changes in Fund Balances**  
Fiscal Year 2024 Modified Tentative Budget

ACCOUNT DESCRIPTION	ACTUAL FY 2021	ACTUAL FY 2022	ADOPTED BUDGET FY 2023	ACTUAL THRU JUL-2023	PROJECTED AUG- SEP-2023	TOTAL PROJECTED FY 2023	ANNUAL BUDGET FY 2024
<b>REVENUES</b>							
Interest - Investments	\$ 28	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Special Assmnts- Tax Collector	12,864	-	-	-	-	-	-
Special Assmnts- Discounts	(492)	-	-	-	-	-	-
<b>TOTAL REVENUES</b>	<b>12,400</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>EXPENDITURES</b>							
<i>Administrative</i>							
Misc-Assessment Collection Cost	146	-	-	-	-	-	-
<b>Total Administrative</b>	<b>146</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<i>Contingency</i>							
Capital Outlay	150,900	30,500	-	-	-	-	-
Capital Reserve	12,830	-	-	-	-	-	-
<b>Total Contingency</b>	<b>163,730</b>	<b>30,500</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>TOTAL EXPENDITURES</b>	<b>163,876</b>	<b>30,500</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Excess (deficiency) of revenues Over (under) expenditures	(151,476)	(30,500)	-	-	-	-	-
<b>OTHER FINANCING SOURCES (USES)</b>							
Interfund Transfer - In	-	-	-	15,000	-	15,000	-
Contribution to (Use of) Fund Balance	-	-	-	-	-	-	-
<b>TOTAL OTHER SOURCES (USES)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>15,000</b>	<b>-</b>	<b>15,000</b>	<b>-</b>
Net change in fund balance	(151,476)	(30,500)	-	15,000	-	15,000	-
<b>FUND BALANCE, BEGINNING</b>	<b>438,239</b>	<b>286,762</b>	<b>-</b>	<b>256,262</b>	<b>-</b>	<b>256,262</b>	<b>271,262</b>
<b>FUND BALANCE, ENDING</b>	<b>\$ 286,763</b>	<b>\$ 256,262</b>	<b>\$ -</b>	<b>\$ 271,262</b>	<b>\$ -</b>	<b>\$ 271,262</b>	<b>\$ 271,262</b>

Harbour Isles  
**Community Development District**

**Debt Service Budgets**  
Fiscal Year 2024



HARBOUR ISLES

Community Development District

Debt Service Fund - Series 2021

**Summary of Revenues, Expenditures and Changes in Fund Balances**  
Fiscal Year 2024 Modified Tentative Budget

ACCOUNT DESCRIPTION	ACTUAL FY 2021	ACTUAL FY 2022	ADOPTED BUDGET FY 2023	ACTUAL THRU JUL-2023	PROJECTED AUG- SEP-2023	TOTAL PROJECTED FY 2023	ANNUAL BUDGET FY 2024
<b>REVENUES</b>							
Interest - Investments	-	\$ 5	\$ -	\$ 3	\$ 1	\$ 4	-
Special Assmnts- Tax Collector	-	312,608	312,608	312,608	-	312,608	312,608
Special Assmnts- Discounts	-	(11,860)	(12,504)	(11,934)	-	(11,934)	(12,504)
<b>TOTAL REVENUES</b>	<b>-</b>	<b>300,753</b>	<b>300,104</b>	<b>300,677</b>	<b>1</b>	<b>300,678</b>	<b>300,104</b>
<b>EXPENDITURES</b>							
<i>Administrative</i>							
Misc-Assessment Collection Cost	-	3,658	6,252	6,013	-	6,013	6,252
<b>Total Administrative</b>	<b>-</b>	<b>3,658</b>	<b>6,252</b>	<b>6,013</b>	<b>-</b>	<b>6,013</b>	<b>6,252</b>
<i>Debt Service</i>							
Principal Debt Retirement	750	224,000	226,000	226,000	-	226,000	229,000
Interest Expense	-	53,095	68,308	68,308	-	68,308	65,847
Cost of Issuance	127,395	-	-	-	-	-	-
<b>Total Debt Service</b>	<b>128,145</b>	<b>277,095</b>	<b>294,308</b>	<b>294,308</b>	<b>-</b>	<b>294,308</b>	<b>294,847</b>
<b>TOTAL EXPENDITURES</b>	<b>128,145</b>	<b>280,753</b>	<b>300,560</b>	<b>300,321</b>	<b>-</b>	<b>300,321</b>	<b>301,099</b>
Excess (deficiency) of revenues							
Over (under) expenditures	(128,145)	20,000	(456)	357	1	357	(995)
<b>OTHER FINANCING SOURCES (USES)</b>							
Interfund Transfer - In	63,731	-	-	-	-	-	-
Proceeds of Refunding Bonds	131,512	-	-	-	-	-	-
Contribution to (Use of) Fund Balance	-	-	(456)	-	-	-	(995)
<b>TOTAL OTHER SOURCES (USES)</b>	<b>195,243</b>	<b>-</b>	<b>(456)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(995)</b>
Net change in fund balance	67,098	20,000	(456)	357	1	357	(995)
<b>FUND BALANCE, BEGINNING</b>	<b>-</b>	<b>67,098</b>	<b>87,099</b>	<b>87,099</b>	<b>-</b>	<b>87,099</b>	<b>87,456</b>
<b>FUND BALANCE, ENDING</b>	<b>\$ 67,098</b>	<b>\$ 87,098</b>	<b>\$ 86,643</b>	<b>\$ 87,456</b>	<b>\$ 1</b>	<b>\$ 87,456</b>	<b>\$ 86,461</b>

HARBOUR ISLES

Community Development District

Debt Service Fund - Series 2021

**Debt Amortization Schedule  
Special Assessment Refunding Bonds, Series 2021**

Period Ending	Bond Balance	Principal	Coupon	Interest	Debt Service	Annual Debt Service
11/1/2023	3,065,000			32,923	32,923	
5/1/2024	2,836,000	229,000	1.2709%	32,923	261,923	294,847
11/1/2024	2,836,000			31,468	31,468	
5/1/2025	2,604,000	232,000	1.4831%	31,468	263,468	294,937
11/1/2025	2,604,000			29,748	29,748	
5/1/2026	2,368,000	236,000	1.6838%	29,748	265,748	295,496
11/1/2026	2,368,000			27,761	27,761	
5/1/2027	2,128,000	240,000	1.8684%	27,761	267,761	295,522
11/1/2027	2,128,000			25,519	25,519	
5/1/2028	1,883,000	245,000	2.0307%	25,519	270,519	296,038
11/1/2028	1,883,000			23,031	23,031	
5/1/2029	1,633,000	250,000	2.1634%	23,031	273,031	296,063
11/1/2029	1,633,000			20,327	20,327	
5/1/2030	1,377,000	256,000	2.2766%	20,327	276,327	296,654
11/1/2030	1,377,000			17,413	17,413	
5/1/2031	1,115,000	262,000	2.3755%	17,413	279,413	296,826
11/1/2031	1,115,000			14,301	14,301	
5/1/2032	847,000	268,000	2.4614%	14,301	282,301	296,602
11/1/2032	847,000			11,003	11,003	
5/1/2033	572,000	275,000	2.5351%	11,003	286,003	297,006
11/1/2033	572,000			7,517	7,517	
5/1/2034	290,000	282,000	2.5995%	7,517	289,517	297,034
11/1/2034	290,000			3,852	3,852	
5/1/2035		290,000	2.6564%	3,852	293,852	297,704
<b>Total</b>		<b>3,065,000</b>		<b>489,728</b>	<b>3,554,728</b>	<b>3,554,728</b>

**Budget Narrative**  
Fiscal Year 2024

**REVENUES**

**Special Assessments-Tax Collector**

The District will levy a Non-Ad Valorem assessment on all sold and platted parcels (using the uniform method) within the District in order to pay for the operating expenditures during the Fiscal Year.

**Special Assessments-Discounts**

Per Section 197.162 and Section 197.3632 of the Florida Statutes, discounts are allowed for early payments of assessments collected by the Tax Collector and only when the Tax Collector is using the uniform methodology. The budgeted amount for the fiscal year is calculated at 4% of the anticipated Non-Ad Valorem assessments.

**EXPENDITURES**

**Administrative**

**Miscellaneous-Assessment Collection Costs**

The District reimburses the Collier County Tax Collector for necessary administrative costs. Per the Florida Statutes, administrative costs shall include, but not be limited to, those costs associated with personnel, forms, supplies, data processing, computer equipment, postage, and programming. The District also compensates the Tax Collector for the actual cost of collection or 2% on the amount of special assessments collected and remitted, whichever is greater. The assessment collection cost is based on a maximum of 2% of the anticipated assessment collections.

**Debt Service**

**Principal Debt Retirement**

The District pays regular principal payments annually in order to pay down/retire the debt.

**Interest Expense**

The District makes semi-annual interest payments on the outstanding debt.



Harbour Isles  
**Community Development District**

**Supporting Budget Schedules**  
Fiscal Year 2024

**Comparison of Assessment Rates  
Fiscal Year 2024 vs. Fiscal Year 2023**

Product & Phase	General Fund 001			Series 2021 Debt Service			Total Assessments per Unit			Total Units
	FY 2024	FY 2023	% Change	FY 2024	FY 2023	% Change	FY 2024	FY 2023	% Change	
Single Family 70'	\$1,857.55	\$1,711.32	8.5%	\$585.62	\$585.62	0.0%	\$2,443.16	\$2,296.94	6.4%	243
Single Family 80'	\$2,117.60	\$1,950.91	8.5%	\$648.81	\$648.81	0.0%	\$2,766.42	\$2,599.72	6.4%	152
Single Family 90'	\$2,396.23	\$2,207.61	8.5%	\$730.68	\$730.68	0.0%	\$3,126.92	\$2,938.29	6.4%	105
										<b>500</b>

# **Subsection 5C**

## **Resolution 2023-04**



## RESOLUTION 2023-04

### A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT ADOPTING A BUDGET FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2023, AND ENDING SEPTEMBER 30, 2024; AND PROVIDING AN EFFECTIVE DATE.

**WHEREAS**, the District Manager submitted, prior to June 15, to the Board of Supervisors (“**Board**”) of the Harbour Isles Community Development District (“**District**”) a proposed budget for the next ensuing budget year (“**Proposed Budget**”), along with an explanatory and complete financial plan for each fund, pursuant to the provisions of Sections 189.016(3) and 190.008(2)(a), Florida Statutes;

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

**WHEREAS**, the Board held a duly noticed public hearing pursuant to Section 190.008(2)(a), Florida Statutes;

**WHEREAS**, the District Manager posted the Proposed Budget on the District’s website at least 2 days before the public hearing pursuant to Section 189.016(4), Florida Statutes;

**WHEREAS**, the Board is required to adopt a resolution approving a budget for the ensuing fiscal year and appropriate such sums of money as the Board deems necessary to defray all expenditures of the District during the ensuing fiscal year pursuant to Section 190.008(2)(a), Florida Statutes; and

**WHEREAS**, the Proposed Budget projects the cash receipts and disbursements anticipated during a given time period, including reserves for contingencies for emergency or other unanticipated expenditures during the fiscal year.

### **NOW, THEREFORE, BE IT RESOLVED BY THE BOARD:**

#### **Section 1. Budget**

- a. That the Board has reviewed the Proposed Budget, a copy of which is on file with the office of the District Manager and at the District’s records office, and hereby approves certain amendments thereto, as shown below.
- b. That the Proposed Budget as amended by the Board attached hereto as **Exhibit A**, is hereby adopted in accordance with the provisions of Section 190.008(2)(a), Florida Statutes, and incorporated herein by reference; provided, however, that the comparative figures contained in the adopted budget may be subsequently revised as deemed necessary by the District Manager to reflect actual revenues and expenditures for fiscal year 2022-2023 and/or revised projections for fiscal year 2023-2024.
- c. That the adopted budget, as amended, shall be maintained in the office of the District Manager and at the District’s records office and identified as “The Budget for the

Harbour Isles Community Development District for the Fiscal Year Beginning October 1, 2023, and Ending September 30, 2024”.

- d. The final adopted budget shall be posted by the District Manager on the District’s website within 30 days after adoption pursuant to Section 189.016(4), Florida Statutes.

**Section 2. Appropriations.** There is hereby appropriated out of the revenues of the District (the sources of the revenues will be provided for in a separate resolution), for the fiscal year beginning October 1, 2023, and ending September 30, 2024, the sum of \$ \_\_\_\_\_, which sum is deemed by the Board to be necessary to defray all expenditures of the District during said budget year, to be divided and appropriated in the following fashion:

Total General Fund	\$ _____
Total Debt Service Funds	\$ _____
<b>Total All Funds*</b>	<b>\$ _____</b>

\*Not inclusive of any collection costs or early payment discounts.

**Section 3. Budget Amendments.** Pursuant to Section 189.016(6), Florida Statutes, the District at any time within the fiscal year or within 60 days following the end of the fiscal year may amend its budget for that fiscal year as follows:

- a. The Board may authorize an increase or decrease in line item appropriations within a fund by motion recorded in the minutes if the total appropriations of the fund do not increase.
- b. The District Manager or Treasurer may authorize an increase or decrease in line item appropriations within a fund if the total appropriations of the fund do not increase and if the aggregate change in the original appropriation item does not exceed \$10,000 or 10% of the original appropriation.
- c. Any other budget amendments shall be adopted by resolution and be consistent with Florida law. This includes increasing any appropriation item and/or fund to reflect receipt of any additional unbudgeted monies and making the corresponding change to appropriations or the unappropriated balance.

The District Manager or Treasurer must establish administrative procedures to ensure that any budget amendments are in compliance with this section and Section 189.016, Florida Statutes, among other applicable laws. Among other procedures, the District Manager or Treasurer must ensure that any amendments to budget(s) under subparagraph c. above are posted on the District’s website within 5 days after adoption pursuant to Section 189.016(7), Florida Statutes.

**Section 4. Effective Date.** This Resolution shall take effect upon the passage and adoption of this Resolution by the Board.

**Passed and Adopted on August 22, 2023.**

**Attest:**

**Harbour Isles  
Community Development District**

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Angel Montagna  
Secretary

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Chair of the Board of Supervisors

**Exhibit A: FY 2023-2024 Adopted Budget**



# **Subsection 5D**

## **Resolution 2023-05**

## RESOLUTION 2023-05

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT IMPOSING ANNUALLY RECURRING OPERATIONS AND MAINTENANCE NON-AD VALOREM SPECIAL ASSESSMENTS; PROVIDING FOR COLLECTION AND ENFORCEMENT OF ALL DISTRICT SPECIAL ASSESSMENTS; CERTIFYING AN ASSESSMENT ROLL; PROVIDING FOR AMENDMENT OF THE ASSESSMENT ROLL; PROVIDING FOR CHALLENGES AND PROCEDURAL IRREGULARITIES; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE.**

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

**WHEREAS**, the District is located in Hillsborough County, Florida (“**County**”);

**WHEREAS**, the Board of Supervisors of the District (“**Board**”) hereby determines to undertake various activities described in the District’s adopted budget for fiscal year 2023-2024 attached hereto as **Exhibit A (“FY 2023-2024 Budget”)** and incorporated as a material part of this Resolution by this reference;

**WHEREAS**, the District must obtain sufficient funds to provide for the activities described in the FY 2023-2024 Budget;

**WHEREAS**, the provision of the activities described in the FY 2023-2024 Budget is a benefit to lands within the District;

**WHEREAS**, the District may impose non-ad valorem special assessments on benefited lands within the District pursuant to Chapter 190, Florida Statutes;

**WHEREAS**, such special assessments may be placed on the County tax roll and collected by the local Tax Collector (“**Uniform Method**”) pursuant to Chapters 190 and 197, Florida Statutes;

**WHEREAS**, the District has, by resolution and public notice, previously evidenced its intention to utilize the Uniform Method;

**WHEREAS**, the District has approved an agreement with the County Property Appraiser (“**Property Appraiser**”) and County Tax Collector (“**Tax Collector**”) to provide for the collection of special assessments under the Uniform Method;

**WHEREAS**, it is in the best interests of the District to proceed with the imposition, levy, and collection of the annually recurring operations and maintenance non-ad valorem special assessments on all assessable lands in the amount contained for each parcel’s portion of the FY 2023-2024 Budget (“**O&M Assessments**”);

**WHEREAS**, the Board desires to collect the annual installment for the previously levied debt service non-ad valorem special assessments (“**Debt Assessments**”) in the amounts shown in the FY 2023-2024 Budget;

**WHEREAS**, the District adopted an assessment roll as maintained in the office of the District Manager, available for review, and incorporated as a material part of this Resolution by this reference (“**Assessment Roll**”);

**WHEREAS**, it is in the best interests of the District to certify the Assessment Roll to the Tax Collector pursuant to the Uniform Method; and

**WHEREAS**, it is in the best interests of the District to permit the District Manager to amend the Assessment Roll, including the property certified to the Tax Collector by this Resolution, as the Property Appraiser updates the property roll, for such time as authorized by Florida law.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD:**

**Section 1. Benefit from Activities and O&M Assessments.** The provision of the activities described in the FY 2023-2024 Budget confer a special and peculiar benefit to the lands within the District, which benefits exceed or equal the O&M Assessments allocated to such lands. The allocation of the expenses of the activities to the specially benefited lands is shown in the FY 2023-2024 Budget and in the Assessment Roll.

**Section 2. O&M Assessments Imposition.** Pursuant to Chapter 190, Florida Statutes and procedures authorized by Florida law for the levy and collection of special assessments, the O&M Assessments are hereby imposed and levied on benefited lands within the District in accordance with the FY 2023-2024 Budget and Assessment Roll. The lien of the O&M Assessments imposed and levied by this Resolution shall be effective upon passage of this Resolution.

**Section 3. Collection and Enforcement of District Assessments.**

- a. **Uniform Method for all Debt Assessments and all O&M Assessments.** The collection of all Debt Assessments and all O&M Assessments for all lands within the District, shall be at the same time and in the same manner as County taxes in accordance with the Uniform Method, as set forth in the Assessment Roll. All assessments collected by the Tax Collector shall be due, payable, and enforced pursuant to Chapter 197, Florida Statutes.
- b. **Future Collection Methods.** The decision to collect special assessments by any particular method – e.g., on the tax roll or by direct bill – does not mean that such method will be used to collect special assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.

**Section 4. Certification of Assessment Roll.** The Assessment Roll is hereby certified and authorized to be transmitted to the Tax Collector.

**Section 5. Assessment Roll Amendment.** The District Manager shall keep apprised of all updates made to the County property roll by the Property Appraiser after the date of this Resolution and shall amend the Assessment Roll in accordance with any such updates, for such time as authorized



by Florida law. After any amendment of the Assessment Roll, the District Manager shall file the updates to the tax roll in the District records.

**Section 6. Assessment Challenges.** The adoption of this Resolution shall be the final determination of all issues related to the O&M Assessments as it relates to property owners whose benefited property is subject to the O&M Assessments (including, but not limited to, the determination of special benefit and fair apportionment to the assessed property, the method of apportionment, the maximum rate of the O&M Assessments, and the levy, collection, and lien of the O&M Assessments), unless proper steps shall be initiated in a court of competent jurisdiction to secure relief within 30 days from adoption date of this Resolution.

**Section 7. Procedural Irregularities.** Any informality or irregularity in the proceedings in connection with the levy of the O&M Assessments shall not affect the validity of the same after the adoption of this Resolution, and any O&M Assessments as finally approved shall be competent and sufficient evidence that such O&M Assessment was duly levied, that the O&M Assessment was duly made and adopted, and that all other proceedings adequate to such O&M Assessment were duly had, taken, and performed as required.

**Section 8. Severability.** The invalidity or unenforceability of any one or more provisions of this Resolution shall not affect the validity or enforceability of the remaining portions of this Resolution, or any part thereof.

**Section 9. Effective Date.** This Resolution shall take effect upon the passage and adoption of this Resolution by the Board.

**Passed and Adopted on August 22, 2023.**

**Attest:**

**Harbour Isles  
Community Development District**

\_\_\_\_\_  
Angel Montagna  
Secretary

\_\_\_\_\_  
Chair of the Board of Supervisors

**Exhibit A: FY 2023-2024 Budget**

# **Section 6**

## **Staff Reports and Updates**

# **Subsection 6E**

## **Property Manager**



# **Subsection 6E(i)**

## **Monthly Report**

**PROPERTY MANAGER**  
 121 Spindle Shell Way  
 Apollo Beach, Florida 33572  
 Office Phone: (813) 507-4510  
[propmgt@harbourislesfl.com](mailto:propmgt@harbourislesfl.com)



**July 25<sup>th</sup> to August 22<sup>nd</sup>, 2023 Clubhouse Operations/Maintenance Updates:**

**VENDORS:**

- **SOLITUDE LAKE MANAGEMENT/VERTEX INC:**



- Treating Alligator weeds, Hydrilla, duckweeds and Azolla in all ponds.
- Doing bi-weekly treatments in all ponds.
- Serviced water fountain in pond# 2.
- **ABM AIR CONDITIONING:** Replaced AC compressor, for Activity Room.



- **TRIMAC OUTDOORS**



- Mowed areas on Common Property weekly.
- **PENDING:** Cutbacks on the edge of mowing: Train track, Butterfly Shell Dr, Slipper Key Rd and Behind Royal Bonnet Dr.
- **PENDING:** Irrigation issues around the Clubhouse and other common areas.
- **PENDING:** Replacement of warranty sod on Slipper Key Rd.

**PROPERTY MANAGER**  
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Apollo Beach, Florida 33572  
Office Phone: (813) 507-4510  
[propmgt@harbourislesfl.com](mailto:propmgt@harbourislesfl.com)



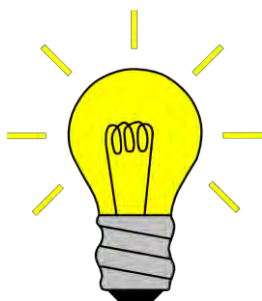
- **CONSTRUCTION MANAGEMENT SERVICES:**



- **PENDING:** Proposals for flagpole.
- **OASIS PALMS AND LANDSCAPING:** Installed two 14" fox tail palm trees, in the parking lot.
- **FITNESS REV: PENDING:** Third quarter Routine PM checks for 2023.



- **ELECTRIC TODAY:**
- **PENDING:** Proposal for running wire for lights on Flag pole.





**PROPERTY MANAGER**  
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- **HAWKINS ELECTRIC: PENDING:** Replace double breaker, inside pool pump enclosure.
- **PENDING:** Proposal to run wire for flag pole lights.
- **HURRICANE PRESSURE WASH:**
- **BIG AND LITTLE WINDOWS WASHING SERVICES LLC.**



- **KAY LIAN CLEANING SERVICES:** Cleans the Gym, restrooms and around the pool deck, twice every week.



**11. NVIROTECT:**



- **COMPLETED:** August 2023. Sprayed for rodents and insects around Clubhouse. Baited stations inside RV/Boat Storage Facility and around Clubhouse.

**PROPERTY MANAGER**  
121 Spindle Shell Way  
Apollo Beach, Florida 33572  
Office Phone: (813) 507-4510  
[propmgt@harbourislesfl.com](mailto:propmgt@harbourislesfl.com)



**12. SUNCOAST POOLS:** Cleaned and check chlorine levels in both pools, three times a week.



**13. SECURITEAM:**



.Rapid Response: Monitoring cameras by pool deck and gym.

**14. HILLSBOROUGH COUNTY:**



- **PENDING: Revised**-Two sidewalk bumps on Hammock View Lane and Slipper Key Rd. Case# SR# 583177 . NEW request- 12/14/22.
- **COMPLETED:** Striping of the streets, and add reflectors.
- **PENDING:** Request for cutting back bushes behind fence, by RV/Boat Storage Facility.
- **PENDING:** Request for repairing street in front of 312, 314 and 316 Royal Bonnet Dr.
- **PENDING:** Request to replace bump pads on Spindle Shell Way, Cackle Shell Loop and corner of Sandy Shell Dr. and Royal Bonnet Dr.

**PROPERTY MANAGER**  
121 Spindle Shell Way  
Apollo Beach, Florida 33572  
Office Phone: (813) 507-4510  
[propmgt@harbourislesfl.com](mailto:propmgt@harbourislesfl.com)



**15. TECO:** Reported two Street lights on in the Community.



**16. PROPERTY MANAGEMENT STAFF:**

- Cleaned pool deck furniture and gym.
- Cobweb walls and ceilings around Clubhouse, Gym and Guard house.
- Took more old broken pool furniture to the County dump.

**17. Green Works Inc:**



- **PENDING:** quarterly injections for 2023, on palm trees.

**18. Site Masters:**

**19. FINN OUTDOOR:**



**PROPERTY MANAGER**  
121 Spindle Shell Way  
Apollo Beach, Florida 33572  
Office Phone: (813) 507-4510  
[propmgt@harbourislesfl.com](mailto:propmgt@harbourislesfl.com)



**20. Florida Wild Life:**



**21. FDOT:**



**Incident Report**

. No Incident Report.

**Resident Relations**

**Rentals/ Events**

. No rental this month.

**Security/ Emergencies**

None.

**Improvements/ Ongoing:**

# **Subsection 6E(ii)**

**Proposal #WQ348069  
from Belson Outdoors**

**Quote #**  
**WQ 348069**

Here is the Quote as per your request. The 'Shipping' total has been applied.  
To place an order, simply click 'Submit Order Confirmation' below.  
Please print this page for your records.  
Customer Order Confirmation is **required** to process order.



627 Amersale Drive  
Naperville, IL. 60563  
sales@belson.com

Toll Free: 1-800-323-5664  
Phone: 1-630-897-8489  
Fax: 1-630-897-0573

**QUOTE #**  
**WQ 348069**

**Expires 9/8/2023**

Model #	Description	Lbs	Quantity	Unit Price	Unit Total
BP-EM6B-A	Replacement 6' Recycled Plastic Plank For Economizer Series Benches Cedar	5	6	\$56.00	\$336.00
Subtotal		30		Subtotal	\$336.00

0.0000% Tax \$0.00

Customer Order Confirmation is required to process order.

Shipping \$79.29

Your Order will not be shipped without your "Order Confirmation"

**Grand Total \$415.29**

Bill To:

Ship To:

First/Last Name Paul Ramsewak

Company Harbour Isles CDD

Address 1 121 Spindle Shell Way

Address 2

City Apollo Beach

State FL

Zip Code 33572

Country USA

Phone 813-593-3464

Fax

Email propmgt@harbourislesfl.com

Ship To Harbour Isles CDD

Address 1 121 Spindle Shell Way

Address 2

City Apollo Beach

State FL

Zip Code 33572

Country USA

Phone 813-593-3464

Contact Paul Ramsewak

Email propmgt@harbourislesfl.com

**Additional Delivery Services**

Phone Call 24 Hours Prior to Delivery

Delivery to Residential or Non-Commercial Truck Route Addresses

Power Liftgate Service - Driver will lower shipment from the truck to the ground (Only)

**Order Power Liftgate Service if — You will be unable to unload the shipment from the truck.**

**Does Not apply to UPS shipments**

**Special Instructions**

EM-email



# **Subsection 6E(iii)**

## **Proposal #1074 from Construction Management**

**Construction Management Services Ilc.**

5233 MOON SHELL DR  
 Apollo Beach, FL 33572 US  
 mikeambriati@live.com

**Estimate**

ADDRESS  
 mgt Paul Ramsewak  
 Harbour Isles CDD  
 121 spindle shell way  
 Apollo Beach, FL 33572 USA

ESTIMATE 1074  
 DATE 07/13/2023  
 EXPIRATION DATE 07/27/2023

DATE	ACTIVITY	AMOUNT
07/13/2023	carpentry - labor and materials Purchase and Install one piece 25 foot commercial grade flagpole at club house. 25 ft ECXA25 Atlas Series external halyard ( wind speed 120 ) Anodized Aluminum satin finish 145 lbs. concrete base and with steel sleeve.	3,200.00
TOTAL		<b>\$3,200.00</b>

Accepted By

Accepted Date

# **Subsection 6E(iv)**

## **Proposal #291 from Hawkins Electric**



# ESTIMATE

## Hawkins Service Co.

10517 Riverview Dr  
 Riverview , Fl 33578  
 (813)871-6610

**Date** 08/11/2023

**Estimate #** 291

WWW.HawkinsServiceCo.com  
 Residencial & Marina Department

### To

Harbor isles cdd  
 121 spindle shell way  
 Apollo Beach, Fl 33572  
 8135074510/8137129758

Item	Quantity	Unit Price	Total
Dedicated 20-amp 120v Circuit/with switch leg	1	\$1,980.00	\$1,980.00
Run circuit from electrical room through the attic, across out to the front of the building, and down the the flag pole location. About 75ft total.			
Dig a trench per Ft	45	\$9.60	\$432.00
Run circuit from electrical room through the attic, across out to the front of the building, and down the the flag pole location. About 75ft total.			
LED Outdoor Flood Light - 45W 120-277V - 5590 Lumens	2	\$380.00	\$760.00
The flood light comes with the garden pole included.			
<b>Sub Total</b>			<b>\$3,172.00</b>
<b>Sales Tax</b>		<b>0%</b>	<b>\$0.00</b>
<b>Total</b>			<b>\$3,172.00</b>

**Terms and Conditions**

**\*\*\*\*\*ATTENTION\*\*\*\*\***

ALL BIDS ARE HONORED FOR THIRTY (30) DAYS ONLY. ANY BID OVER THIRTY DAYS MAY BE SUBJECT TO INCREASES DUE TO MATERIAL COSTS OR LABOR INCREASE.

**PAY TERMS:**

**Please sign, print full name and date and send back this proposal to initiate work.  
50% down payment required to start job and remainder will be due upon completion.**

**Please, sign here to accept proposal.**

X \_\_\_\_\_ DATE \_\_\_\_\_  
Signature

X \_\_\_\_\_  
Printed Name

**WARRANTY TERMS AND CONDITIONS:**

- Hawkins Service Co work is warrantied for defects in workmanship for a period of one year.
- Please refer to manufactured warranties for all supplied equipment and materials.
- Materials and equipment supplied by Hawkins Service Co is warrantied according to manufactured terms and conditions.

**TERMS AND CONDITIONS:**

- By signing the above document confirms you are in agreement the pricing and work to be performed at the address listed on this document.
- By signing the undersigned agrees that payment is due upon completion of work unless specified in actual quote above.
- Work is completed once all materials and labor has been furnished and installed.
- Hawkins Service Co, is responsible for any inspection due after the work has been complete and any corrections notices that will need be correct after the work has been completed.
- Any payment that is not paid within said parameters will result in a mechanic's lien that will be filed against the property where the work was performed. Customer will be responsible for all legal and filing fee per Florida Law.
- No services will be performed for any customer with a past due account. You agree to pay all reasonable collection costs, including reasonable attorney's fees and third-Party fees related to collection.

**EXCLUSIONS:**

- Drywall repair, patch work and paint.
  - Stucco repair, patch work and paint.
  - Landscape repair and replacement/ Sod repair and Sod replacement.
- \*\*\*Hawkins Service Company** is not liable for any repairs necessitated as a result of fire, flood or Acts of God, damage by negligence or misuse by others, faulty system design, improper operation, mischief or vandalism, or normal wear and tear. \*\*\*

**Thank you for the opportunity to bid on your Electrical Residential / Docks Marine needs and I look forward to hearing back from you!**

**Hawkins Service Company.**

**(813) 871-6610 Office.**

**mmunoz@hawkinserviceco.com**

ALL BIDS ARE HONORED FOR THIRTY (30) DAYS ONLY. ANY BID OVER THIRTY DAYS MAY BE SUBJECT TO INCREASES DUE TO MATERIAL COSTS OR LABOR INCREASE.

Thank you for the opportunity to bid on your Electrical or Dock Service needs and I look forward to hearing back from you!

Signature **Pending**

Name **Pending**

Date **Pending**

.....  
**PLEASE FOLLOW THE LINK PROVIDED IN THE EMAIL TO E-SIGN THE DOCUMENT**  
.....



# **Subsection 6E(v)**

**Proposal #1189681 from  
Home Service Heroes**



Quote #1189681 for Job #4795009	
Bill To	Harbour Isles CDD 121 Spindle Shell Way Apollo Beach, FL 33572
Service Address	121 Spindle Shell Way Apollo Beach, FL 33572

## Flag pole light install

Customer needs new flag light for new 30ft tall American flag they are getting. Customer wants light to come on with timer and other lights  
2 400w lights on side of flag pole

Approximately 40ft from side of building and additional 30ft to timer

We supply light

QUOTE SUMMARY

Qty	Item	Safeguard Savings Plan Monthly		Non-Member	
		Per Unit	Total	Per Unit	Total
2	DCC-20 - 15-30a 120V/ 240V Circuit in conduit per 20'  <i>Warranty: Electric Today's Quality 5 Year Warranty</i>  <i>15-30a 120V/ 240V Circuit in conduit per 20'</i>	\$418.27	\$836	\$480.26	\$960.52
1	DCC-MC - 15-30a 120V/240V Circuit MC Cable per Addtl 40'  <i>Warranty: Electric Today's Quality 5 Year Warranty</i>  <i>15-30a 120V/240V Circuit MC Cable per Addtl 40'</i>	\$269.43	\$269	\$305.37	\$305.37
1	E-2R - Small Junction Box  <i>Warranty: Electric Today's Quality 5 Year Warranty</i>  <i>Small Junction Box</i>	\$200.54	\$200	\$229.36	\$229.36
1	GEN-A - General A/C task  <i>Warranty: Electric Today's Quality 2 Year Service Warranty</i>  <i>Supply and install (1) 22,300 lumens led flood light</i>	\$0	\$0	\$624.97	\$624.97
				Subtotal	\$2,120.22
				Tax	\$0
				Total	\$2,120.22
				<b>You could have saved:</b>	<b>\$813.71</b>

NOTES

Date	Note
08/09/2023 9:25 AM	Customer needs new switch leg for future flag pole they are getting soon. Flag pole light will come on same time as other lights on timer.

We're here for you if you have any questions:

Call **(813) 653-4221** or email

[service@homeserviceheroes.com](mailto:service@homeserviceheroes.com)

Home Service Heroes  
235 W Brandon Blvd #639  
Brandon, FL 33511

License #: EC13007848, CAC043881, CFC1430628

Thank You for choosing Electric Today's Home Service Heroes!  
Electrical - Air Conditioning - Plumbing



# **Subsection 6E(vi)**

## **Proposal #1066 from Oasis Palms and Landscaping**

**propmgt@harbourislesfl.com**

**From:** Oasis Palms and Landscaping, llc <quickbooks@notification.intuit.com>  
**Sent:** Monday, August 14, 2023 2:00 PM  
**To:** propmgt@harbourislesfl.com  
**Subject:** Estimate 1066 from Oasis Palms and Landscaping, llc

**Follow Up Flag:** Follow up  
**Flag Status:** Completed

Please review the estimate below. Feel free to contact us if you have any questions.  
 We look forward to working with you.

Thanks for your business!  
 Oasis Palms and Landscaping, llc

----- Estimate -----

1017 Bal Harbour Dr  
 Apollo Beach, FL 33572 US  
 (813) 433-3376  
 www.oasispalmsandlandscaping.com

Estimate #: 1066  
 Date: 08/14/2023  
 Exp. Date: \$9,225.00

Address:

Harbour Isles Cdd

Activity	Service	Qty	Rate	Amount
Remove jathropha and re sod area.	Landscapin	1	200.00	200.00
Trim and clean up Hong Kong orchid tree by walk way damaged by storm.	Landscapin	1	450.00	450.00
2 areas- saw cut asphalt, remove oak roots, grade, re compact with base, and install cold patch asphalt	Landscapin	1	1,800.00	1,800.00
Slipper key rd	Landscapin	6	975.00	5,850.00
Remove elm tree (6) (\$125/ea) Install 25' Washingtonian palm (6) (\$850/ea)				
Flush cut dead willow by lake	Landscapin	1	175.00	175.00

Remove dead queen palm along entrance and install new 20' oa.	Landscapin	1	750.00	750.00
---	------------	---	--------	--------

---

Total: \$9,225.00



# **Subsection 6F**

## **Homeowner's Association: Flock Cameras**

# flock safety™

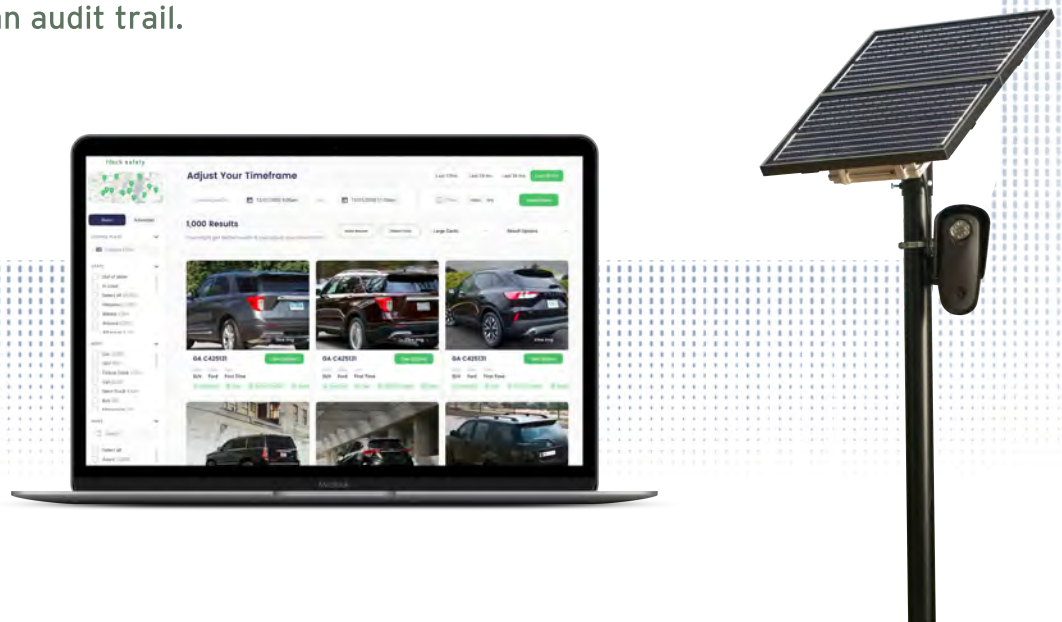
Let's defeat crime together.™

## Our commitment to protecting your privacy while eliminating crime

Flock Safety helps 1200+ cities prevent and eliminate crime with technology that captures objective evidence and delivers it into the hands that serve and protect. In our pursuit of a safer, more equitable society, we place our commitment to protecting human privacy and mitigating bias at the core of every policy and product we develop.

## Our focus on privacy & security

- Store all encrypted data (footage + metadata) on the AWS GovCloud for maximum security compliance.
- Build devices that capture objective evidence, like license plates and never facial recognition.
- Permanently and automatically delete footage after a recommended 30-day period.
- Give 100% ownership of footage to customers and never share or sell data with third parties.
- Capture documented reason or case number to search footage to create an audit trail.



# flock safety

## About Flock Safety ALPR Privacy and Ethics Factsheet

### How does Flock Safety keep devices and data secure?

Flock Safety holds itself to the highest level of security. We have implemented the following security policies and features:

- Flock Safety data and footage is encrypted throughout its entire lifecycle. All data is securely stored with AES256 encryption with our cloud provider, Amazon Web Services.
- On-device, data is only stored temporarily for a short time until it is uploaded to the cloud, at which point it is removed automatically from the local device. This means the data is secure from when it is on the Flock Safety device to when it is transferred to the cloud, using a secure connection to Flock Safety servers. While stored in the cloud, all data (both footage and metadata) is fully encrypted at rest.
- Flock Safety defaults to permanently deleting all data after 30 days on a rolling basis, setting a new standard in the industry.

### Who has access to data collected by Flock Safety devices?

- Flock Safety's customers own 100% of their data and determine who has access. Flock Safety will never share or sell the data, per our privacy policy.
- With explicit written permission from the customer, Flock Safety does have the ability to grant law enforcement access to specific footage for a short period (24 hours, 48 hours, or however long the customer desires) in the event of an investigation following a crime. Access can only be granted through the approval of the customer.
- Flock Safety has maintenance software in place to measure device performance and image capture quality. This is used to diagnose issues preemptively and schedule service calls in the event of a device malfunction or emergency.

### How long does Flock Safety keep data?

- Flock Safety stores footage for only 30 days on a rolling basis by default, after which the footage is automatically hard deleted. The only exception to this is if a democratically-elected governing body or official legislates a different data retention period.



# flock safety

## About Flock Safety ALPR Privacy and Ethics Factsheet

### What is the Safe List and how does a community use it?

- The Safe List allows neighborhood or HOA residents to register their license plate number, so in the event of a crime, customers are able to quickly separate out who lives in the neighborhood and who doesn't. If a neighbor's license plate is on the Safe List, any footage of their vehicle will be marked as "resident."
- The resident can also opt to have their vehicle removed from all footage in the interest of privacy.

### What features do Flock Safety devices have that enable audits and oversight?

- While searching for footage or other evidence on the Flock Safety platform, law enforcement agencies must enter reason codes to verify the legitimacy of the search and create an audit trail.
- Authorized users go through training to properly use our system and communicate with their dispatch teams.
- Flock Safety customers commit not to use the data collected to work with thirdparty repossession companies, traffic enforcement, revenue collection, unpaid fines, or towing companies. We do not use facial recognition or capture any personally identifiable information such as name, phone number, or address, and we do not work with federal government agencies for immigration enforcement purposes.
- Flock Safety's ALPR Transparency Portal, an optional free feature for all law enforcement customers, is the first public-facing dashboard for law enforcement agencies, city leaders, and local government officials to share policies, usage, and public safety outcomes related to ALPR technology. The ALPR Transparency Portal helps promote transparency and accountability in the use of policing technology in order to build community trust while creating a safer, more equitable society.



# **Section 6G**

## **District Manager: Meeting Schedule**

## HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT NOTICE OF MEETING SCHEDULE

The Board of Supervisors of the Harbour Isles Community Development District will hold its regular meetings during fiscal year 2024 at 11:00 a.m. at the Harbour Isles Clubhouse, 121 Spindle Shell Way, Apollo Beach, FL 33572, generally on the fourth Tuesday of every month, unless otherwise noted below. Following are the dates for all meetings:

October 24, 2023	April 23, 2024
November 28, 2023	May 28, 2024
December 19, 2023 ( <i>third Tuesday</i> )	June 25, 2024
January 23, 2024	July 30, 2024 ( <i>fifth Tuesday</i> )
February 27, 2024	August 27, 2024
March 26, 2024	September 24, 2024

The meetings are open to the public and will be conducted in accordance with the provision of Florida Law for Community Development Districts. Meetings may be continued to a date, time, and location to be specified on the record at the meetings.

There may be occasions when Supervisors or staff will participate via telephone or other communication media technology. In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations at these meetings because of a disability or physical impairment should contact the District Manager at 407-566-1935 at least two (2) calendar days prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service at 7-1-1 or (800) 955-8771 (TTY)/(800) 955-8770 (Voice) for aid in contacting the District Management Company.

Each person who decides to appeal any action taken at these meetings is advised that person will need a record of the proceedings and accordingly, the person may need to ensure a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

Angel Montagna, District Manager

---

Publication date: October 5, 2023



# **Section 7**

## **Consent Agenda**

# **Subsection 7A**

## **Minutes**

1 **MINUTES OF MEETING**  
 2 **HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT**

3  
 4 The regular meeting of the Board of Supervisors of the Harbour Isles Community Development  
 5 District was held Tuesday, July 25, 2023, at 11:00 a.m., at 121 Spindle Shell Way, Apollo Beach,  
 6 Florida 33572.

7  
 8 Present and constituting a quorum were the following:  
 9 Betty Fantauzzi Chairman  
 10 Bryce Bowden Vice Chairman  
 11 Glenn Clavio Assistant Secretary  
 12 Gregg Letizia Assistant Secretary  
 13 Bob Nesbitt Assistant Secretary  
 14

15 Also present, either in person or via communication media technology, were the following:  
 16 Angel Montagna District Manager  
 17 Vivek Babbar District Counsel  
 18 Stephen Brletic District Engineer  
 19 Paul Ramsewak Onsite Manager  
 20 Jason Jaszak SÔLitude Lake Management  
 21 Residents and Members of the Public  
 22

23 *This is not a certified or verbatim transcript, but rather represents the context and summary of*  
 24 *the meeting.*  
 25

26 **FIRST ORDER OF BUSINESS Call to Order and Roll Call**

27 Ms. Montagna called the meeting to order at 11:00 a.m.  
 28 Ms. Montagna called the roll and indicated a quorum was present for the meeting.

29  
 30 **SECOND ORDER OF BUSINESS Pledge of Allegiance**

31 The *Pledge of Allegiance* was recited.

32  
 33 **THIRD ORDER OF BUSINESS Audience Comments on Agenda Items**

34 Audience members spoke on the following issues:

35  
 36 **FOURTH ORDER OF BUSINESS Administrative Matters**

37 **A. Appointment of Supervisor to Fill the Unexpired Term for Seat 5**  
 38 Discussion ensued regarding appointments to fill the unexpired term of office for Seat 5.

39  
 40 On MOTION by Ms. Fantauzzi, seconded by Mr. Nesbitt, with all  
 41 in favor, unanimous approval was given to appoint Mr. Gregg  
 42 Letizia to fill the unexpired term of office for Seat #5, and to  
 43 designate Mr. Letizia as Assistant Secretary.

44  
 45 **B. Oath of Office for Newly Appointed Supervisor**  
 46 Ms. Montagna administered the oath of office to Mr. Letizia, who elected to receive



47 compensation through a 1099 with no direct deposit.

48

49 **FIFTH ORDER OF BUSINESS** **Staff Reports and Updates**

50 **A. Field Manager**

51 **i. Monthly Report**

52 Discussion ensued regarding proposals to be obtained: dead palms, dead tree with flowers,  
53 broken bench, removal of three small oaks same side of the street across from Slipper Key, and  
54 remove small bush and replace with sod behind the basketball court.

55 Further discussion ensued regarding fan blade on order, dead sod at Slipper Key which needs  
56 meter hooked up at 5201 Moonshell, Ms. Montagna to reach out to Mr. Paul Corsetti regarding  
57 irrigation, hedges look bad, dog stations emptied once per day at best, and a lot of things still not  
58 being done.

59 **ii. Termination of Field Services with Inframark and Award to Harbour Isles**  
60 **Community Property Manager**

61 Discussion ensued regarding termination of field services with Inframark and award to  
62 Harbour Isles Community Property Management beginning August 1.

63

64 On MOTION by Mr. Clavio, seconded by Mr. Letizia, with all in  
65 favor, unanimous approval was given to terminate field services  
66 with Inframark and award to Harbour Isles Community Property  
67 Management beginning August 1.

68

69 **B. SŌLitude Lake Management (“SŌLitude”)**

70 **i. Monthly Report**

71 Mr. Jaszczak reviewed the regular report included in the agenda package.

72 **ii. Proposal for Quarterly Fountain Maintenance**

73 Discussion ensued regarding quarterly maintenance, and Mr. Babbar to provide the agreement.

74

75 On MOTION by Ms. Fantauzzi, seconded by Mr. Bowden, with all  
76 in favor, unanimous approval was given to the proposal from  
77 SŌLitude Lake Management for quarterly fountain maintenance, in  
78 the annual amount of \$1,160.00, or \$290.00 per quarter.

79

80 Discussion ensued regarding schedule requested from SŌLitude for Brazilian pepper removal.

81 **C. Trimac Outdoor (“Trimac”)**

82 Discussion ensued regarding Trimac’s performance.

83

84 On MOTION by Mr. Clavio, seconded by Ms. Fantauzzi, with all in  
85 favor, unanimous approval was given to provide 60-day notice to  
86 Trimac Outdoor, Mr. Babbar to provide term notice.

87

88 Discussion ensued regarding Ms. Montagna sending requests for proposal (RFP) to be

89 provided at the August meeting, new vendor's start date October 1.

90 **D. District Counsel**

91 There being nothing further to report, the next item followed.

92 **E. District Engineer**

93 Discussion ensued regarding completion of parking lot repairs, at a discount of \$1,200.

94 Approval was given to pay the contractor.

95 Discussion ensued regarding proposals to be obtained for pond erosion for ponds 5, 12, 13,  
96 and 14.

97 **F. Onsite Property Manager's Report**

98 **i. Monthly Report**

99 Mr. Ramsewak reviewed the regular report included in the agenda package.

100 Discussion ensued regarding street striping not on the County schedule, and pool furniture to  
101 arrive by August 21.

102 **ii. Proposal #1130312 from Home Service Heroes for Gooseneck Light Repair**

103 Discussion ensued regarding proposal #1130312, which was not approved.

104 **iii. Proposal #1073 from Construction Management Services for Carpentry Work**

105 Discussion ensued regarding proposal #1073 for carpentry work.

106

107 On MOTION by Ms. Fantauzzi, seconded by Mr. Clavio, with all in  
108 favor, unanimous approval was given to proposal #1073 from  
109 Construction Management Services for carpentry work, in the  
110 amount of \$600.00.

111

112 **iv. Proposal #1074 from Construction Management Services to Install Flag Pole**

113 Discussion ensued regarding proposal #1074, which was not approved.

114 **v. Proposal #1062 from Oasis Palms and Landscaping to Replace Two Foxtail  
115 Palms**

116 Discussion ensued regarding proposal #1062 to replace two foxtail palms.

117

118 On MOTION by Mr. Letizia, seconded by Mr. Clavio, with all in  
119 favor, unanimous approval was given to proposal #1062 from Oasis  
120 Palms and Landscaping to replace two foxtail palms, in the amount  
121 of \$1,050.00.

122

123 **G. Homeowner's Association Report: Flock Safety**

124 Discussion ensued regarding needing to know where the HOA wants to place the cameras on  
125 District property.

126 **H. District Manager**

127 **i. Proposed Fiscal Year 2024 Budget**

128 Discussion ensued regarding the proposed fiscal year 2024 budget.

129

130 **SIXTH ORDER OF BUSINESS** **Consent Agenda**

131 **A. Acceptance of the June 27, 2023, Meeting Minutes**

132 **B. Acceptance of the June 2023 Financials**

133 Ms. Montagna reviewed the consent agenda items included in the agenda package.

134

135

136

137

On MOTION by Ms. Fantauzzi, seconded by Mr. Bowden, with all in favor, unanimous approval was given to the consent agenda, as presented.

138

139 **SEVENTH ORDER OF BUSINESS** **Discussion Items**

140 Discussion ensued regarding reinstating the Bingham household access cards.

141

142

143

144

On MOTION by Mr. Nesbitt, seconded by Mr. Letizia, with all in favor, unanimous approval was given to the consent agenda, as presented.

145

146 Walking trail asphalt will be included on the August agenda.

147

148 **EIGHTH ORDER OF BUSINESS** **Supervisor Requests**

149 There being none, the next order of business followed.

150

151 **NINTH ORDER OF BUSINESS** **Audience Comments**

152 There being none, the next order of business followed.

153

154 **TENTH ORDER OF BUSINESS** **Adjournment**

155

156

157

On MOTION by Mr. Letizia, seconded by Mr. Bowden, with all in favor, the meeting was adjourned at 1:20 p.m.

158

159

160

161

162

---

Angel Montagna, Secretary

---

Betty Fantauzzi, Chairman

# **Subsection 7B**

## **Financials**



HARBOUR ISLES  
Community Development District

*Financial Report*

*July 31, 2023*

Prepared By



HARBOUR ISLES  
Community Development District

---

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HARBOUR ISLES  
Community Development District

**Financial Statements**

(Unaudited)

**July 31, 2023**

**Balance Sheet**  
July 31, 2023

<u>ACCOUNT DESCRIPTION</u>	<u>GENERAL FUND</u>	<u>RESERVE FUND</u>	<u>DEBT SERVICE FUND - SERIES 2021</u>	<u>TOTAL</u>
<b><u>ASSETS</u></b>				
Cash - Checking Account	\$ 205,054	\$ -	\$ -	\$ 205,054
Due From Other Funds	-	248,222	3,739	251,961
Investments:				
Money Market Account	514,000	-	-	514,000
Revenue Fund	-	-	83,888	83,888
Deposits	-	23,040	-	23,040
Utility Deposits - TECO	18,687	-	-	18,687
<b>TOTAL ASSETS</b>	<b>\$ 737,741</b>	<b>\$ 271,262</b>	<b>\$ 87,627</b>	<b>\$ 1,096,630</b>
<b><u>LIABILITIES</u></b>				
Accounts Payable	\$ 20,152	\$ -	\$ -	\$ 20,152
Due To Other Funds	251,961	-	-	251,961
<b>TOTAL LIABILITIES</b>	<b>272,113</b>	<b>-</b>	<b>-</b>	<b>272,113</b>
<b><u>FUND BALANCES</u></b>				
<b>Nonspendable:</b>				
Deposits	18,687	23,040	-	41,727
<b>Restricted for:</b>				
Debt Service	-	-	87,627	87,627
<b>Assigned to:</b>				
Operating Reserves	154,042	-	-	154,042
<b>Unassigned:</b>	<b>292,899</b>	<b>248,222</b>	<b>-</b>	<b>541,121</b>
<b>TOTAL FUND BALANCES</b>	<b>\$ 465,628</b>	<b>\$ 271,262</b>	<b>\$ 87,627</b>	<b>\$ 824,517</b>
<b>TOTAL LIABILITIES &amp; FUND BALANCES</b>	<b>\$ 737,741</b>	<b>\$ 271,262</b>	<b>\$ 87,627</b>	<b>\$ 1,096,630</b>



HARBOUR ISLES  
Community Development District

**General Fund**

**Statement of Revenues, Expenditures and Changes in Fund Balances**  
For the Period Ending July 31, 2023

<u>ACCOUNT DESCRIPTION</u>	<u>ANNUAL ADOPTED BUDGET</u>	<u>YEAR TO DATE ACTUAL</u>	<u>VARIANCE (\$) FAV(UNFAV)</u>	<u>YTD ACTUAL AS A % OF ADOPTED BUD</u>
<b><u>REVENUES</u></b>				
Interest - Investments	\$ 1,133	\$ 19,772	\$ 18,639	1745.10%
Interest - Tax Collector	-	570	570	0.00%
Rental Income	16,000	33,600	17,600	210.00%
Special Assmnts- Tax Collector	944,189	944,188	(1)	100.00%
Special Assmnts- Discounts	(37,768)	(36,046)	1,722	95.44%
Other Miscellaneous Revenues	500	76	(424)	15.20%
Facility Revenue	200	100	(100)	50.00%
<b>TOTAL REVENUES</b>	<b>924,254</b>	<b>962,260</b>	<b>38,006</b>	<b>104.11%</b>
<b><u>EXPENDITURES</u></b>				
<b><u>Administration</u></b>				
P/R-Board of Supervisors	12,000	9,600	2,400	80.00%
FICA Taxes	918	734	184	79.96%
ProfServ-Arbitrage Rebate	600	-	600	0.00%
ProfServ-Engineering	20,000	21,304	(1,304)	106.52%
ProfServ-Legal Services	20,000	16,923	3,077	84.62%
ProfServ-Mgmt Consulting	50,003	41,669	8,334	83.33%
ProfServ-Special Assessment	5,000	5,000	-	100.00%
ProfServ-Trustee Fees	3,233	3,367	(134)	104.14%
Auditing Services	4,200	3,700	500	88.10%
Website Hosting/Email services	4,000	1,552	2,448	38.80%
Postage and Freight	500	254	246	50.80%
Insurance - General Liability	3,337	3,337	-	100.00%
Public Officials Insurance	3,256	3,291	(35)	101.07%
Legal Advertising	1,000	2,549	(1,549)	254.90%
Misc-Assessment Collection Cost	18,884	18,163	721	96.18%
Bank Fees	500	866	(366)	173.20%
Misc-Web Hosting	1,000	375	625	37.50%
Miscellaneous Expenses	500	657	(157)	131.40%
Annual District Filing Fee	175	175	-	100.00%
<b>Total Administration</b>	<b>149,106</b>	<b>133,516</b>	<b>15,590</b>	<b>89.54%</b>
<b><u>Electric Utility Services</u></b>				
Electricity - Streetlights	120,000	99,125	20,875	82.60%
Utility Services	22,000	18,327	3,673	83.30%
<b>Total Electric Utility Services</b>	<b>142,000</b>	<b>117,452</b>	<b>24,548</b>	<b>82.71%</b>

HARBOUR ISLES  
Community Development District

**General Fund**

**Statement of Revenues, Expenditures and Changes in Fund Balances**  
For the Period Ending July 31, 2023

<u>ACCOUNT DESCRIPTION</u>	<u>ANNUAL ADOPTED BUDGET</u>	<u>YEAR TO DATE ACTUAL</u>	<u>VARIANCE (\$) FAV(UNFAV)</u>	<u>YTD ACTUAL AS A % OF ADOPTED BUD</u>
<b><u>Garbage/Solid Waste Services</u></b>				
Garbage - Recreation Facility	2,500	3,384	(884)	135.36%
<b>Total Garbage/Solid Waste Services</b>	<b>2,500</b>	<b>3,384</b>	<b>(884)</b>	<b>135.36%</b>
<b><u>Water-Sewer Comb Services</u></b>				
Utility Services	6,000	2,481	3,519	41.35%
<b>Total Water-Sewer Comb Services</b>	<b>6,000</b>	<b>2,481</b>	<b>3,519</b>	<b>41.35%</b>
<b><u>Stormwater Control</u></b>				
Midge Fly Treatment	8,000	-	8,000	0.00%
R&M-Stormwater System	500	-	500	0.00%
R&M-Wetland Monitoring	8,700	7,250	1,450	83.33%
R&M Lake & Pond Bank	50,000	100,400	(50,400)	200.80%
Fountain Maintenance	2,328	2,194	134	94.24%
Aquatic Maintenance	25,704	22,920	2,784	89.17%
Aquatic Plant Replacement	2,500	-	2,500	0.00%
<b>Total Stormwater Control</b>	<b>97,732</b>	<b>132,764</b>	<b>(35,032)</b>	<b>135.84%</b>
<b><u>Other Physical Environment</u></b>				
Insurance - Property	25,603	25,693	(90)	100.35%
Insurance - General Liability	3,945	3,876	69	98.25%
R&M-Irrigation	20,000	5,325	14,675	26.63%
Landscape Maintenance	150,000	81,102	68,898	54.07%
Landscape Replacement	20,000	21,666	(1,666)	108.33%
Landscape Replacement-Annuaals	6,000	-	6,000	0.00%
Annual Mulching	20,000	15,500	4,500	77.50%
Entry & Walls Maintenance	4,000	-	4,000	0.00%
Misc-Hurricane Expense	-	14,516	(14,516)	0.00%
Holiday Lighting & Decorations	2,000	-	2,000	0.00%
<b>Total Other Physical Environment</b>	<b>251,548</b>	<b>167,678</b>	<b>83,870</b>	<b>66.66%</b>
<b><u>Security Operations</u></b>				
Contracts-Security Services	30,636	12,984	17,652	42.38%
R&M-Security Cameras	1,000	612	388	61.20%
Guard & Gate Facility Maintenance	3,000	3,943	(943)	131.43%
<b>Total Security Operations</b>	<b>34,636</b>	<b>17,539</b>	<b>17,097</b>	<b>50.64%</b>
<b><u>Contingency</u></b>				
Miscellaneous Expenses	15,500	10,680	4,820	68.90%
<b>Total Contingency</b>	<b>15,500</b>	<b>10,680</b>	<b>4,820</b>	<b>68.90%</b>

**Statement of Revenues, Expenditures and Changes in Fund Balances**  
For the Period Ending July 31, 2023

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)	YTD ACTUAL AS A % OF ADOPTED BUD
<b><u>Parks and Recreation</u></b>				
ProfServ-Pool Maintenance	10,800	12,060	(1,260)	111.67%
Field Services	7,800	6,500	1,300	83.33%
Clubhouse - Facility Janitorial Service	5,400	9,385	(3,985)	173.80%
Lighting Replacement	6,000	-	6,000	0.00%
Contracts-Mgmt Services	121,624	91,630	29,994	75.34%
Contracts-Pest Control	2,000	1,628	372	81.40%
Telephone/Fax/Internet Services	5,109	5,652	(543)	110.63%
R&M-Pools	1,500	-	1,500	0.00%
R&M-Fitness Equipment	2,500	4,174	(1,674)	166.96%
R&M-Dock	500	-	500	0.00%
Maintenance & Repairs	50,000	56,916	(6,916)	113.83%
Athletic/Park Court/Field Repairs	500	-	500	0.00%
Furniture Repair/Replacement	5,000	12,848	(7,848)	256.96%
Trail/Bike Path Maintenance	500	4,680	(4,180)	936.00%
Playground Equipment and Maintenance	1,000	-	1,000	0.00%
Access Control	500	312	188	62.40%
Office Supplies	2,500	970	1,530	38.80%
Dog Waste Station Supplies	2,000	1,421	579	71.05%
<b>Total Parks and Recreation</b>	<b>225,233</b>	<b>208,176</b>	<b>17,057</b>	<b>92.43%</b>
<b>TOTAL EXPENDITURES</b>	<b>924,255</b>	<b>793,670</b>	<b>130,585</b>	<b>85.87%</b>
Excess (deficiency) of revenues				
Over (under) expenditures	-	168,590	168,591	0.00%
<b><u>OTHER FINANCING SOURCES (USES)</u></b>				
Operating Transfers-Out	-	(15,000)	(15,000)	0.00%
Contribution to (Use of) Fund Balance	-	-	-	0.00%
<b>TOTAL FINANCING SOURCES (USES)</b>	<b>-</b>	<b>(15,000)</b>	<b>(15,000)</b>	<b>0.00%</b>
Net change in fund balance	\$ -	\$ 153,590	\$ 153,591	0.00%
<b>FUND BALANCE, BEGINNING (OCT 1, 2022)</b>	<b>312,038</b>	<b>312,038</b>		
<b>FUND BALANCE, ENDING</b>	<b>\$ 312,038</b>	<b>\$ 465,628</b>		

**Statement of Revenues, Expenditures and Changes in Fund Balances**  
For the Period Ending July 31, 2023

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)	YTD ACTUAL AS A % OF ADOPTED BUD
<b>REVENUES</b>				
Interest - Investments	\$ -	\$ -	\$ -	0.00%
<b>TOTAL REVENUES</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0.00%</b>
<b>EXPENDITURES</b>				
<b>TOTAL EXPENDITURES</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0.00%</b>
Excess (deficiency) of revenues Over (under) expenditures	-	-	-	0.00%
<b>OTHER FINANCING SOURCES (USES)</b>				
Interfund Transfer - In	-	15,000	15,000	0.00%
<b>TOTAL FINANCING SOURCES (USES)</b>	<b>-</b>	<b>15,000</b>	<b>15,000</b>	<b>0.00%</b>
Net change in fund balance	\$ -	\$ 15,000	\$ 15,000	0.00%
<b>FUND BALANCE, BEGINNING (OCT 1, 2022)</b>	<b>-</b>	<b>256,262</b>		
<b>FUND BALANCE, ENDING</b>	<b>\$ -</b>	<b>\$ 271,262</b>		



**Statement of Revenues, Expenditures and Changes in Fund Balances**  
For the Period Ending July 31, 2023

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)	YTD ACTUAL AS A % OF ADOPTED BUD
<b>REVENUES</b>				
Interest - Investments	\$ -	\$ 175	\$ 175	0.00%
Special Assmnts- Tax Collector	312,608	312,608	-	100.00%
Special Assmnts- Discounts	(12,504)	(11,934)	570	95.44%
<b>TOTAL REVENUES</b>	<b>300,104</b>	<b>300,849</b>	<b>745</b>	<b>100.25%</b>
<b>EXPENDITURES</b>				
<b>Administration</b>				
Misc-Assessment Collection Cost	6,252	6,013	239	96.18%
<b>Total Administration</b>	<b>6,252</b>	<b>6,013</b>	<b>239</b>	<b>96.18%</b>
<b>Debt Service</b>				
Principal Debt Retirement	226,000	226,000	-	100.00%
Interest Expense	68,308	68,308	-	100.00%
<b>Total Debt Service</b>	<b>294,308</b>	<b>294,308</b>	<b>-</b>	<b>100.00%</b>
<b>TOTAL EXPENDITURES</b>	<b>300,560</b>	<b>300,321</b>	<b>239</b>	<b>99.92%</b>
Excess (deficiency) of revenues Over (under) expenditures	(456)	528	984	0.00%
<b>OTHER FINANCING SOURCES (USES)</b>				
Contribution to (Use of) Fund Balance	(456)	-	456	0.00%
<b>TOTAL FINANCING SOURCES (USES)</b>	<b>(456)</b>	<b>-</b>	<b>456</b>	<b>0.00%</b>
Net change in fund balance	\$ (456)	\$ 528	\$ 1,896	0.00%
<b>FUND BALANCE, BEGINNING (OCT 1, 2022)</b>	<b>87,099</b>	<b>87,099</b>		
<b>FUND BALANCE, ENDING</b>	<b>\$ 86,643</b>	<b>\$ 87,627</b>		

HARBOUR ISLES  
Community Development District

**Supporting Schedules**

**July 31, 2023**

**HARBOUR ISLES  
COMMUNITY DEVELOPMENT DISTRICT**

**Non-Ad Valorem Special Assessments - Hillsborough County Tax Collector  
(Monthly Collection Distributions)  
For the Fiscal Year Ending September 30, 2023**

Date Received	Net Amount Received	Discount / (Penalties) Amount	Collection Costs	Gross Amount Received	ALLOCATION BY FUND	
					General Fund	Debt Service Fund
Assessments Levied FY23				\$ 1,256,797	\$ 944,189	\$ 312,608
Allocation %				100.00%	75.13%	24.87%
11/02/22	\$ 13,679	\$ 710	\$ 279	\$ 14,667	\$ 11,019	\$ 3,648
11/15/22	\$ 71,586	\$ 3,044	\$ 1,461	\$ 76,091	\$ 57,164	\$ 18,926
11/22/22	\$ 51,664	\$ 2,197	\$ 1,054	\$ 54,915	\$ 41,256	\$ 13,659
11/29/22	\$ 87,667	\$ 3,727	\$ 1,789	\$ 93,183	\$ 70,005	\$ 23,178
12/5/22	\$ 852,326	\$ 36,194	\$ 17,394	\$ 905,914	\$ 680,583	\$ 225,332
12/12/22	\$ 14,948	\$ 609	\$ 305	\$ 15,862	\$ 11,916	\$ 3,945
01/05/23	\$ 36,867	\$ 1,365	\$ 752	\$ 38,985	\$ 29,288	\$ 9,697
02/03/23	\$ 9,696	\$ 202	\$ 198	\$ 10,096	\$ 7,585	\$ 2,511
03/09/23	\$ 9,501	\$ 98	\$ 194	\$ 9,793	\$ 7,357	\$ 2,436
04/05/23	\$ 28,899	\$ -	\$ 590	\$ 29,489	\$ 22,154	\$ 7,335
05/05/23	\$ 2,251	\$ -	\$ 46	\$ 2,297	\$ 1,726	\$ 571
06/05/23	\$ 2,624	\$ (78)	\$ 54	\$ 2,600	\$ 1,953	\$ 647
06/15/23	\$ 2,931	\$ (87)	\$ 60	\$ 2,904	\$ 2,182	\$ 722
<b>TOTAL</b>	<b>\$ 1,184,640</b>	<b>\$ 47,980</b>	<b>\$ 24,176</b>	<b>\$ 1,256,796</b>	<b>\$ 944,188</b>	<b>\$ 312,608</b>
% COLLECTED				100%	100%	100%
<b>TOTAL OUTSTANDING</b>				<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>

**Cash and Investment  
July 31, 2023**

<b>GENERAL FUND</b>						
<u>Account Name</u>	<u>Bank Name</u>	<u>Investment Type</u>	<u>Maturity</u>	<u>Yield</u>	<u>Balance</u>	
Checking Account - Operating	Hancock Whitney	Checking account	n/a	0.00%	\$	205,054
Money Market Account	Valley National	Money Market	n/a	5.00%	\$	514,000
					<i>Subtotal</i>	<b><u>\$ 719,054</u></b>
<b>DEBT SERVICE FUNDS</b>						
Series 2021 Revenue Account	US Bank	Open-Ended Comm. Paper	n/a	5.15%	\$	83,888
					<i>Subtotal</i>	<b><u>\$ 83,888</u></b>
					<b>Total</b>	<b><u>\$ 802,942</u></b>



# Harbour Isles CDD

## Bank Reconciliation

Bank Account No. 6870 Hancock Whitney Bank GF CHECKING  
 Statement No. 7/23  
 Statement Date 7/31/2023

<b>G/L Balance (LCY)</b>	205,053.53	<b>Statement Balance</b>	218,410.72
<b>G/L Balance</b>	205,053.53	<b>Outstanding Deposits</b>	1,615.00
<b>Positive Adjustments</b>	0.00		
	<hr/>	<b>Subtotal</b>	220,025.72
<b>Subtotal</b>	205,053.53	<b>Outstanding Checks</b>	14,972.19
<b>Negative Adjustments</b>	0.00	<b>Differences</b>	0.00
	<hr/>		
<b>Ending G/L Balance</b>	205,053.53	<b>Ending Balance</b>	205,053.53
<b>Difference</b>	0.00		

Posting Date	Document Type	Document No.	Description	Amount	Cleared Amount	Difference
<b>Outstanding Checks</b>						
6/6/2023	Payment	DD446	Payment of Invoice 001853	178.14	0.00	178.14
7/17/2023	Payment	DD463	Payment of Invoice 001928	451.00	0.00	451.00
7/21/2023	Payment	3653	BRLETIC DVORAK, INC	1,747.50	0.00	1,747.50
7/26/2023	Payment	3660	NVIROTECT PEST CONTROL SERVICES, I	182.00	0.00	182.00
7/26/2023	Payment	3661	SOLITUDE LAKE MANAGEMENT	3,250.55	0.00	3,250.55
7/26/2023	Payment	3663	VESTA PROPERTY SERVICES, INC.	9,163.00	0.00	9,163.00
<b>Total Outstanding Checks.....</b>				<b>14,972.19</b>		<b>14,972.19</b>
<b>Outstanding Deposits</b>						
7/20/2023		DEP00098	RENTAL/REMOTE	G/L Ac 1,615.00	0.00	1,615.00
<b>Total Outstanding Deposits.....</b>				<b>1,615.00</b>		<b>1,615.00</b>

## HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT

### Payment Register by Bank Account

For the Period from 7/1/23 to 7/31/23

(Sorted by Check / ACH No.)

Date	Payee Type	Payee	Invoice No.	Payment Description	Invoice / GL Description	G/L Account #	Amount Paid
<b><u>HANCOCK WHITNEY BANK GF CHECKING - (ACCT#XXXXX6870)</u></b>							
<b>CHECK # 3647</b>							
07/07/23	Employee	ROBERT NESBITT	PAYROLL	July 07, 2023 Payroll Posting			\$184.70
							<b>Check Total</b>
							\$184.70
<b>CHECK # 3648</b>							
07/06/23	Vendor	ABM INDUSTRIES INC	18279615	MAINTENANCE BILLING	Maintenance & Repairs	001-546920-57201	\$324.00
							<b>Check Total</b>
							\$324.00
<b>CHECK # 3649</b>							
07/06/23	Vendor	SECURITEAM, INC	16950	(2) HID CARTRIDGE FULL-COLOR	R&M-Security Cameras	001-546345-53935	\$143.96
							<b>Check Total</b>
							\$143.96
<b>CHECK # 3650</b>							
07/06/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-80752	6/1/23 - 8/31/23 FOUNTAIN 1&2 ANNUAL MAINT	JUNE BILLING	001-546472-53805	\$231.00
07/06/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-83612	JUNE 2023 LAKE ANNUAL MAINTENANCE	JUNE BILLING	001-546995-53805	\$2,142.00
07/06/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-83617	JUNE' 23 WETLAND MT-2/MT-1 ANNUAL MAINT	JUNE BILLING	001-546108-53805	\$725.00
							<b>Check Total</b>
							\$3,098.00
<b>CHECK # 3651</b>							
07/06/23	Vendor	VESTA PROPERTY SERVICES, INC.	410316	JUNE 23 AMENITY MGMT SVCS	JUNE 23	001-534001-57201	\$9,163.00
							<b>Check Total</b>
							\$9,163.00
<b>CHECK # 3652</b>							
07/14/23	Vendor	INFRAMARK, LLC.	96985	JUNE 2023 MANAGEMENT SRVCS	ProfServ-Mgmt Consulting Serv	001-531027-51201	\$4,166.92
07/14/23	Vendor	INFRAMARK, LLC.	96985	JUNE 2023 MANAGEMENT SRVCS	Postage and Freight	001-541006-51301	\$21.00
07/14/23	Vendor	INFRAMARK, LLC.	96985	JUNE 2023 MANAGEMENT SRVCS	Field Services	001-531122-57201	\$650.00
							<b>Check Total</b>
							\$4,837.92
<b>CHECK # 3653</b>							
07/21/23	Vendor	BRLETIC DVORAK, INC	1145	SENIOR INSPECTOR/ PROJECT MANAGER PARKING LOT REPA	ProfServ-Engineering	001-531013-51501	\$1,747.50
							<b>Check Total</b>
							\$1,747.50
<b>CHECK # 3654</b>							
07/21/23	Vendor	SECURITEAM, INC	13558061623	REPLACED 7AMP HR PANEL BATTERY	R&M-Security Cameras	001-546345-53935	\$175.00
							<b>Check Total</b>
							\$175.00
<b>CHECK # 3655</b>							
07/21/23	Vendor	YARD-NIQUE , INC.	63714	LANDSCAPE CLEAN UP	CLEAN UP	001-546036-53908	\$2,250.00
							<b>Check Total</b>
							\$2,250.00
<b>CHECK # 3656</b>							
07/26/23	Vendor	NVIROTECT PEST CONTROL SERVICES, INC	299946	***Voided Voided****			\$0.00
07/26/23	Vendor	NVIROTECT PEST CONTROL SERVICES, INC	302244	***Voided Voided****			\$0.00
							<b>Check Total</b>
							\$0.00

## HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT

### Payment Register by Bank Account

For the Period from 7/1/23 to 7/31/23

(Sorted by Check / ACH No.)

Date	Payee Type	Payee	Invoice No.	Payment Description	Invoice / GL Description	G/L Account #	Amount Paid
<b>CHECK # 3657</b>							
07/26/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-92542	***Voided Voided****			\$0.00
07/26/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-92611	***Voided Voided****			\$0.00
07/26/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-90429	***Voided Voided****			\$0.00
<b>Check Total</b>							\$0.00
<b>CHECK # 3658</b>							
07/26/23	Vendor	SUNCOAST POOL SERVICE	9462	***Voided Voided****			\$0.00
07/26/23	Vendor	SUNCOAST POOL SERVICE	9506	***Voided Voided****			\$0.00
<b>Check Total</b>							\$0.00
<b>CHECK # 3659</b>							
07/26/23	Vendor	VESTA PROPERTY SERVICES, INC.	411047	***Voided Voided****			\$0.00
<b>Check Total</b>							\$0.00
<b>CHECK # 3660</b>							
07/26/23	Vendor	NVIROTECT PEST CONTROL SERVICES, INC	299946	PEST CONTROL	Contracts-Pest Control	001-534125-57201	\$158.00
07/26/23	Vendor	NVIROTECT PEST CONTROL SERVICES, INC	302244	PEST CONTROL	Contracts-Pest Control	001-534125-57201	\$24.00
<b>Check Total</b>							\$182.00
<b>CHECK # 3661</b>							
07/26/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-92542	JULY 2023 LAKE ANNUAL MAINT	JULY BILLING	001-546995-53805	\$2,142.00
07/26/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-92611	JULY 2023 WETLAND MT-2/MT-1 ANNUAL MAINT	JULY BILLING	001-546108-53805	\$725.00
07/26/23	Vendor	SOLITUDE LAKE MANAGEMENT	PSI-90429	JULY 2023 AERATORS MAINT	JULY BILLING	001-546472-53805	\$383.55
<b>Check Total</b>							\$3,250.55
<b>CHECK # 3662</b>							
07/26/23	Vendor	SUNCOAST POOL SERVICE	9462	JULY 2023 SWIMMING POOL SVCS	ProfServ-Pool Maintenance	001-531034-57201	\$1,180.00
07/26/23	Vendor	SUNCOAST POOL SERVICE	9506	REPLACEMENT UP AND DOWN ACTUATOR FOR ADA	ProfServ-Pool Maintenance	001-531034-57201	\$1,100.00
<b>Check Total</b>							\$2,280.00
<b>CHECK # 3663</b>							
07/26/23	Vendor	VESTA PROPERTY SERVICES, INC.	411047	JULY'23 AMENITY MANAGEMENT SRVCS	JULY'23	001-534001-57201	\$9,163.00
<b>Check Total</b>							\$9,163.00
<b>ACH #DD447</b>							
07/07/23	Employee	ELIZABETH M. FANTAUZZI	PAYROLL	July 07, 2023 Payroll Posting			\$184.70
<b>ACH Total</b>							\$184.70
<b>ACH #DD448</b>							
07/07/23	Employee	GLENN A. CLAVIO	PAYROLL	July 07, 2023 Payroll Posting			\$184.70
<b>ACH Total</b>							\$184.70
<b>ACH #DD449</b>							
07/07/23	Employee	BRYCE L. BOWDEN	PAYROLL	July 07, 2023 Payroll Posting			\$184.70
<b>ACH Total</b>							\$184.70

## HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT

### Payment Register by Bank Account

For the Period from 7/1/23 to 7/31/23

(Sorted by Check / ACH No.)

Date	Payee Type	Payee	Invoice No.	Payment Description	Invoice / GL Description	G/L Account #	Amount Paid
<b>ACH #DD455</b>							
07/17/23	Vendor	TAMCO CAPITAL CORP	4155594 ACH	7/15/23 - 8/14/23 BILL PRD	Contracts-Security Services	001-534037-53935	\$451.00
<b>ACH Total</b>							<u>\$451.00</u>
<b>ACH #DD456</b>							
07/13/23	Vendor	T-MOBILE ACH	062023-81124 ACH	813-593-3464 ; 6/21/23 - 7/21/23 BILL PRD	Telephone/Fax/Internet Services	001-541009-57201	\$70.00
<b>ACH Total</b>							<u>\$70.00</u>
<b>ACH #DD461</b>							
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	A2 WEB HOST	001-549999-57201	\$95.88
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	HOME DEPOT	001-549999-57201	\$72.69
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	CELLGATE	001-549999-57201	\$29.95
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	HOME DEPOT	001-549999-57201	\$77.11
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	MAILCHIMP	001-549999-57201	\$13.00
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	HOME DEPOT	001-549999-57201	\$45.72
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	AMAZON	001-549999-57201	\$93.44
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	AMAZON	001-549999-57201	\$55.96
07/20/23	Vendor	VALLEY NATIONAL BANK - ACH	062023-5409 ACH	JUNE 2023 PURCHASES	SAMS CLUB	001-549999-57201	\$68.88
<b>ACH Total</b>							<u>\$552.63</u>
<b>ACH #DD462</b>							
07/27/23	Vendor	TAMPA ELECTRIC CO. ACH	070523 ACH	5/31/23 - 6/28/23 UTILITIES	Electricity - Streetlighting	001-543013-53100	\$12,007.61
07/27/23	Vendor	TAMPA ELECTRIC CO. ACH	070523 ACH	5/31/23 - 6/28/23 UTILITIES	Utility Services	001-543063-53100	\$2,200.18
<b>ACH Total</b>							<u>\$14,207.79</u>
<b>ACH #DD463</b>							
07/17/23	Vendor	TAMCO CAPITAL CORP	4183687 ACH	7/19/23 - 8/15/23 BILL PRD	Contracts-Security Services	001-534037-53935	\$451.00
<b>ACH Total</b>							<u>\$451.00</u>
<b>ACH #DD464</b>							
07/10/23	Vendor	REPUBLIC SERVICES - ACH	061723-5809 ACH	07/01/23 - 07/31/23 WASTE REMOVAL	Garbage - Recreation Facility	001-531133-53401	\$368.51
<b>ACH Total</b>							<u>\$368.51</u>
<b>ACH #DD465</b>							
07/21/23	Vendor	FLORIDA DEPT OF HEALTH	29-BID-6559352 ACH	WADING POOL PERMIT	Miscellaneous Expenses	001-549999-53985	\$200.35
<b>ACH Total</b>							<u>\$200.35</u>
<b>ACH #DD466</b>							
07/21/23	Vendor	FLORIDA DEPT OF HEALTH	29-BID-6558876 ACH	SWIMMING POOLS- PUBLIC POOL PERMIT	Public Pool Permit	001-549999-53985	\$325.35
<b>ACH Total</b>							<u>\$325.35</u>
<b>ACH #DD467</b>							
07/05/23	Vendor	BRIGHT HOUSE NETWORKS-ACH	061723-8408 ACH	SERVICE FROM 06/17/23-07/16/23	Telephone/Fax/Internet Services	001-541009-57201	\$178.14
<b>ACH Total</b>							<u>\$178.14</u>



## HARBOUR ISLES COMMUNITY DEVELOPMENT DISTRICT

### Payment Register by Bank Account

For the Period from 7/1/23 to 7/31/23

(Sorted by Check / ACH No.)

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<b>ACH #DD468</b>							
07/31/23	Vendor	BRIGHT HOUSE NETWORKS-ACH	071123-1826 ACH	SVCS FROM 07/11/23-08/10/23	Telephone/Fax/Internet Services	001-541009-57201	\$281.12
							<b>ACH Total</b>
							<u>\$281.12</u>
<b>ACH #DD469</b>							
07/18/23	Vendor	BOCC - ACH	070523-88063 ACH	06/05/23-07/03/23 WATER UTILITIES	Utility Services	001-543063-53601	\$98.60
							<b>ACH Total</b>
							<u>\$98.60</u>
<b>ACH #DD470</b>							
07/18/23	Vendor	BOCC - ACH	070523-20000 ACH	06/01/23-07/01/23 WATER UTILITIES	Utility Services	001-543063-53601	\$217.98
							<b>ACH Total</b>
							<u>\$217.98</u>
							<b>Account Total</b>
							<u><b>\$54,756.20</b></u>