

Heritage Lake Park Community Development District

March 2, 2026

Agenda Package

TEAMS MEETING INFORMATION

MEETING ID: 252 487 676 369 25

PASSCODE: bq676dx9

Join: <https://teams.microsoft.com/meet/2524876763925?p=fNaE7SNUcP5ivXn7d9>

CALL-IN INFORMATION

PHONE #: 646-838-1601 **ID#:** 883 271 003#

11555 HERON BAY
SUITE 201
CORAL SPRINGS, FLORIDA 33076

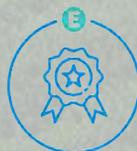
CLEAR PARTNERSHIPS



COLLABORATION



LEADERSHIP



EXCELLENCE



ACCOUNTABILITY



RESPECT

**HERITAGE LAKE PARK
COMMUNITY DEVELOPMENT DISTRICT**

Board of Supervisors:

- James DeFilippo, Chairperson
- Greg Krauss, Vice Chairperson
- Robert Delagi, Assistant Secretary
- Elizabeth Shella, Assistant Secretary
- Niles Waring, Assistant Secretary

District Staff:

- Heather Jackson, District Manager
- Andrew Cohen, District Counsel
- Jeffrey Satfield, District Engineer
- Howard Neal, Field Services Director
- Sergio Inguanzo, Accountant
- Crystal Yem, Administrative Assistant

**Final Agenda
Monday, March 2, 2026 – 10:00 a.m.**

- 1. Call to Order and Roll Call**
- 2. Pledge of Allegiance**
- 3. Motion to Approve Agenda**
- 4. Audience Comments - Three (3) Minute Time Limit**
- 5. Staff Reports**
 - A. District Accountant
 - B. District Engineer
 - C. District Counsel
 - D. Landscape Update
 - i. Juniper Site Audit Report.....Page 3
 - ii. Juniper Project Schedule Update.....Page 15
 - E. District Manager
 - i. SOLitude Service Report.....Page 18
- 6. Business Items**
 - A. Consideration of Resolution 2026-05, Approving the Proposed Budget and Setting a Public Hearing
(Under Separate Cover)
 - B. Discussion of PMI and CPH
- 7. Business Administration**
 - A. Consideration of the Regular Meeting Minutes of the January 5, 2026 Meeting.....Page 20
 - B. Consideration of the Regular Meeting Minutes of the February 2, 2026 Meeting.....Page 24
 - C. Acceptance of the January 2026 Financial Report
(Under Separate Cover)
 - D. Ratification of Items Approved Under Resolution 2024-04
- 8. Supervisor Requests**
- 9. Chairperson’s Comment**
- 10. Audience Comments – Three (3) Time Limit**
- 11. Adjournment**

The next Meeting is scheduled to be held on Monday, April 6, 2026, at 10:00 a.m.

District Office

Inframark, Infrastructure Management Services
11555 Heron Bay Boulevard, Suite 201
Coral Springs, Florida 33076
954-603-0033

Meeting Location

Heritage Lake Park Clubhouse
25635 Heritage Lake Boulevard
Punta Gorda, Florida 33983
941-624-4319



Juniper

Property Evaluation Report

02/11/26

Heritage Lake Park CDD

JOSUE MENDEZ

josue.mendez@juniperlandscaping.com

Evaluation Grade

2.2

Flower Beds

1

- Dead plants on Main Entry need replacement



- Front entry crotons mamey need replace to enhance entry area

Turf Condition - Common Grounds

3

- Turf is dry do to frost



Heritage Lake Park CDD



Heritage Lake Park CDD



Shrub Bed Condition - Common Ground

2

- Lots of dead Plants do to frost



Heritage Lake Park CDD



Heritage Lake Park CDD



Amenity Areas

3

- Club house area and tennis court areas can benefit with some plant on diferrent areas



Heritage Lake Park CDD



Lake Areas / Conservation areas

2

- Commons Areas and Perimeter wall trim and mow only one area we still working on in order to finish perimeter trimming



Heritage Lake Park CDD



Trees - Common Ground

2

- Two Washingtonians on Main road area needs removal



Community Enhancements

1

- Main entry area its in need of new plants lots of dead Plants do to Frost



Heritage Lake Park CDD





Juniper

DESIGN | BUILD | MAINTAIN

Yem, Crystal

From: Jackson, Heather <hjackson@inframark.com>
Sent: Saturday, February 14, 2026 10:12 AM
To: Yem, Crystal
Cc: Vega, Mark
Subject: HLPCDD- FW: Project Schedule Update – Proposals

Crystal,

Please make sure to add under landscape in Heritage Lake Park Agenda for next month. 😊

Thank you,

Heather Jackson | District Manager



313 Campus Street Celebration, FL 34747

Email: Hjackson@inframark.com

(M) (656) 258-5166 | www.inframark.com

***Please note that all vendor invoices should be directed to our new email address at InframarkCMS@payableslockbox.com**

Please note: Florida has a very broad public records law. Most written communications to or from districts regarding business are public records available to the public and media upon request. Your e-mail communications may therefore be subject to public disclosure. Please do not reply "to all".

 **Go Green: Please do not print this e-mail unless you really need to!**

From: Josue Mendez <josue.mendez@juniperlandscaping.com>
Sent: Friday, February 13, 2026 11:53 AM
To: Jackson, Heather <hjackson@inframark.com>; Vega, Mark <mark.vega@inframark.com>; Yem, Crystal <crystal.yem@inframark.com>; Anthony Scappatura <AScappatura@juniperlandscaping.com>; Kyle J. Leverette <kylejames@juniperlandscaping.com>
Subject: Project Schedule Update – Proposals

This Message Is From an External Sender

This message came from outside your organization. Please use caution when clicking links.

Good Morning,

I hope you're doing well. I wanted to provide a full update on our current projects and scheduled services.

Proposal #362349 – Mulch Installation has been completed.

Proposal #381036 – Rock Installation and **Proposal #377662 – Island Beautification** are scheduled to take place on **2/16**.

Proposal #377661 – Palm Tree Trimming is scheduled for **2/13**.

The **Washingtonian removal** is scheduled for **2/27**.

Our **irrigation team** is scheduled for the **last week of the month** to complete the monthly irrigation wet check. As we transition to our new Canvas program, this will create a better understanding and an easier way to submit the monthly irrigation reports. Brian, our Irrigation Manager, will send the irrigation report by the **first week of the following month**.

The **IPM service** is also scheduled for the **last week of the month** for a complete treatment.

As I walked the community this week, I inspected the perimeter trimming along the wall. We are currently **85% complete** and I am confident it will be fully completed by the end of next week.

I also noticed a number of plants that have suffered from the recent freezing temperatures, and some may not recover. I will be putting together additional information and working with Nile on a possible future beautification project, starting with high-traffic areas for the benefit of the community.

Additionally, I will be preparing a full description by area, including photos, to present at next month's meeting. This will include updates on turf, plants, and a calendar outlining next month's scheduled services.

Please let me know if you have any questions or need any additional details.

Best regards,

Josue Mendez

Account Manager

Venice Branch

O | (239) 561-5980 ext 1003

D | (239) 469-9280

E | josue.mendez@juniperlandscaping.com

Visit us at www.junipercares.com





Work Order	00932455	Account	Heritage Lake Park CDD
Work Order	00932455	Contact	Justin Faircloth
Number		Address	25614 Heritage Lake Blvd Punta Gorda, FL 33983 United States
Created Date	2/10/2026		

Work Details

Specialist	Two vertex lights were installed and are working	Prepared By	Alex Rivera
Comments to	properly upon departure.		
Customer			

Work Order Assets

Asset	Status	Product Work Type
Heritage Lake Park CDD Fountain 1	Included	

Service Parameters

Asset	Product Work Type	Specialist Comments to Customer
Heritage Lake Park CDD Fountain 1		



Work Order	00925554	Account	Heritage Lake Park CDD
Work Order	00925554	Contact	Justin Faircloth
Number		Address	25614 Heritage Lake Blvd Punta Gorda, FL 33983 United States
Created Date	2/10/2026		

Work Details

Specialist	Fountain was cleaned and checked for	Prepared By	Alex Rivera
Comments to	functionality. Motor is running within amp range .		
Customer	Both vertex lights are working.		

Work Order Assets

Asset	Status	Product Work Type
Heritage Lake Park CDD Fountain 1	Inspected	

Service Parameters

Asset	Product Work Type	Specialist Comments to Customer
Heritage Lake Park CDD Fountain 1	CHECK POWER CABLE	
Heritage Lake Park CDD Fountain 1	PANEL COMPONENT CHECK	
Heritage Lake Park CDD Fountain 1	LIGHTING INSPECTION (IF APPLICABLE)	
Heritage Lake Park CDD Fountain 1	FOUNTAIN FUNCTIONALITY	
Heritage Lake Park CDD Fountain 1		

1 **MINUTES OF MEETING**
2 **HERITAGE LAKE PARK**
3 **COMMUNITY DEVELOPMENT DISTRICT**
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6 The regular meeting of the Board of Supervisors of the Heritage Lake Park Community
7 Development District was held on Monday, January 5, 2026, at 10:00 a.m. at the Heritage Lake
8 Park Clubhouse, located at 25635 Heritage Lake Boulevard, Punta Gorda, Florida 33983.

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11 Present and constituting a quorum were:

12 James DeFilippo	Chairperson
13 Greg Krauss	Vice Chairperson
14 Robert Delagi	Assistant Secretary
15 Elizabeth Shella	Assistant Secretary
16 Niles Waring	Assistant Secretary

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18
19 Also present were:

20 Heather Jackson	District Manager
21 Mark Vega	Senior District Manager
22 Various Residents	

23
24
25 *This is not a certified or verbatim transcript but rather represents the context and*
26 *summary of the meeting. The full meeting is available in audio format upon request. Contact*
27 *the District Office for any related costs for an audio copy.*

28
29 **FIRST ORDER OF BUSINESS**

Call to Order and Roll Call

30 Mr. Vega called the meeting to order and called the roll. A quorum was established.

31
32 **SECOND ORDER OF BUSINESS**

Pledge of Allegiance

33 The Pledge of Allegiance was recited.

34
35 **THIRD ORDER OF BUSINESS**

Approval of Agenda

36
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On MOTION by Mr. Waring, seconded by Mr. DeFilippo, with all 38 in favor, the agenda was approved. (5-0)

39
40 **FOURTH ORDER OF BUSINESS**

Audience Comments on Agenda Items

41 There being no audience comments, the next order of business followed.

42 **FIFTH ORDER OF BUSINESS** **Staff Reports**

43 **A. District Accountant**
44 Not Present- No Report.

45
46 **B. District Engineer**
47 Not Present- No Report.

48
49 **C. District Counsel**
50 Not Present- No Report.

51
52 **D. District Manager**
53 **i. SOLitude Service Reports**
54 No report from SOLitude.

55
56 **ii. LMP Monthly Inspection Report**
57 No report. District Management will work with Mr. Waring to start making
58 sure LMP is providing their reports.

59
60 **iii. Update on Follow-Up Actions**
61 Report not included. Mr. DeFilippo stated that everything was handled in
62 the report.

63
64 **SIXTH ORDER OF BUSINESS** **Business Items**

65 **A. Consideration of Resolution 2026-02, Removing and Replacing Treasurer**

66
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On MOTION by Mr. Krauss, seconded by Ms. Shella, with all in 68 favor, the Board adopted Resolution 2026-02, Removing and 69 Replacing the Treasurer. (5-0)

70
71 **B. Discussion of Preliminary Fiscal Year 2027 Budget**
72 Discussed and ensued. The meeting date for June will need to be changed from June
73 1st, 2026, to June 8th, 2026. Advertising will need to be completed.

74
75

On MOTION by Mr. Delagi, seconded by Ms. DeFilippo, with all 76 in favor, the Board would like to reschedule the June 1, 2026 77 meeting, to June 8, 2026. (5-0)
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78
79 **C. Discussion of Reserve Study**
80 Discussed and ensued. Mr. Vega will work on having the mail kiosk removed from
81 the reserve study, as it has already been completed.

82
83 **D. Consideration of Painting Proposal from Peacock Painting Services**

for Painting of Amenity Facilities

On MOTION by Ms. Shella, seconded by Mr. Delagi, with all in favor, the Board approved the Painting Proposal from Peacock Painting Services for the Painting of Amenity Facilities. (5-0)

E. Consideration of Proposal 377661 from Juniper for Tall Palm Tree Trimming

On MOTION by Mr. Waring, seconded by Mr. Krauss, with all in favor, the Board approved Proposal 377661 from Juniper for the Tall Palm Tree Trimming. (5-0)

F. Consideration of Proposal 377662 for Island Beautification

On MOTION by Mr. DeFilippo, seconded by Ms. Shella, with all in favor, the Board approved Proposal 377662 for Island Beautification. (5-0)

G. Consideration of Proposal 337765 for Washington Tree Removal

On MOTION by Mr. Waring, seconded by Mr. DeFilippo, with all in favor, the Board approved Proposal 337765 for the Washington Tree Removal. (5-0)

H. Consideration of Property Purchase

Discussed and ensured in depth.

On MOTION by Mr. Krauss, seconded by Mr. Waring, with all in favor, the Board approved to move forward with a proposal to designate Greg Krauss to investigate the property purchase for Parcel A & B, with a not-to-exceed amount of \$350,000.

SEVENTH ORDER OF BUSINESS Business Administration

A. Minutes of the December 1, 2025 Regular Meeting

On MOTION by Mr. Waring, seconded by Ms. Shella, with all in favor, the Minutes of the December 1, 2025, Regular Meeting were approved. (5-0)

B. Acceptance of the November 2025 Financial Report

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On MOTION by Ms. Shella, seconded by Mr. Krauss, with all in favor, the November 2025 Financial Report was accepted. (5-0)

C. Ratification of Items Approved Under Resolution 2024-04

i. Proposal 375300 from Juniper for Irrigation Enhancement

On MOTION by Mr. DeFilippo, seconded by Mr. Delagi, with all in favor, the Board ratified Proposal 375300 from Juniper for Irrigation Enhancement.

ii. Estimate 2110900 from Paradise Outdoor Lights LLC for Gatehouse & Palm Tree Lighting

On MOTION by Mr. DeFilippo, seconded by Mr. Delagi, with all in favor, the Board ratified Estimate 2110900 from Paradise Outdoor Lights LLC for the Gatehouse and Palm Tree Lighting.

EIGHTH ORDER OF BUSINESS

Supervisor Requests

Ms. Shella- The pool vendor is not filling out the pool log testing daily. Ms. Jackson was instructed not to contact the vendor. Greg Krauss- Would like to investigate an RFP for security/camera services.

NINTH ORDER OF BUSINESS

Chairperson’s Comment

Mr. DeFilippo informed the Board that the lighting is all complete.

TENTH ORDER OF BUSINESS

Audience Comments – 3 Minute Time Limit

There being no audience comments, the next order of business followed.

ELEVENTH ORDER OF BUSINESS

Adjournment

There being no further business,

On MOTION by Mr. Krauss, seconded by Ms. Shella, with all in favor, the meeting was adjourned at 11:51 a.m. (5-0)

James DeFilippo
Chairperson

43 **FIFTH ORDER OF BUSINESS** **Staff Reports**

44 **A. District Accountant**
45 Not Present- No Report.

46
47 **B. District Engineer**
48 Not Present- No Report. Mr. DeFilippo states that PMI is missing the Density
49 Report for Asphalt to engineering.

50
51 **C. District Counsel**
52 Not Present- No Report.

53
54 **D. District Manager**
55 Ms. Jackson informed the Board regarding her Maternity leave and that Mr. Vega
56 will oversee the District while she is away. She reminded the Board to please start
57 copying Mr. Vega in all email correspondence.

58
59 **i. SOLitude Service Reports**
60 No report from SOLitude.

61
62 **ii. LMP Monthly Inspection Report**
63 No report. District Management will work with Mr. Waring to start making
64 sure LMP is providing their reports.

65
66 **SIXTH ORDER OF BUSINESS** **Business Items**

67 **A. Consideration of Light Pole Replacement Proposals**

68
69 On MOTION by Mr. DeFilippo, seconded by Mr. Waring, with all
70 in favor, the Board approved the Trowbridge Energy Group Inc, in
71 the amount of \$12,031.08.

72
73 **B. Consideration of One-Time Littoral Planting Proposal**

74
75 On MOTION by Mr. Delagi, seconded by Ms. Shella, with all in
76 favor, the Board approved the One-Time Littoral Planting Proposal.

77
78 **C. Discussion of Envera Replacement RFP**
79 Mr. Krauss discussed the Envera Replacement RFP. District counsel will prepare
80 an informal RFP.

81
82 **D. Discussion of Property Purchase Update**
83 Mr. Krauss discussed the issue.

84
85 On MOTION by Mr. Krauss, seconded by Mr. Delagi, with all in
86 favor, the Board approved to make a counteroffer at \$250,000.

87

88 **E. Discussion of Repairing the Paver Sidewalk to Remove the Puddles from**
89 **Forming Around the Sprinklers**

90 The funds will be coming out of the Capital Improvements/Reserve.
91

92 On MOTION by Mr. DeFilippo, seconded by Ms. Shella, with all in
93 favor, the Board approved Estimate 5268 from Thaylons Pavers Pro,
94 LLC in the amount of \$6,578.

95
96 **SEVENTH ORDER OF BUSINESS Business Administration**

97 **A. Minutes of the January 5, 2026, Regular Meeting**

98 Tabled due to pending offer on Parcel A/B.
99

100 **B. Acceptance of the December 2025 Financial Report**

101
102 On MOTION by Ms. Shella, seconded by Mr. DeFilippo, with all in
103 favor, the December 2025 Financial Report was accepted. (5-0)

104
105 **C. Ratification of Items Approved Under Resolution 2024-04**

- 106 1. Ratification of the Replacement of the Bin for the Ice Machine
107 Proposal
108

109 On MOTION by Mr. DeFilippo, seconded by Mr. Delagi, with all in
110 favor, the Board ratified the Proposal of the Replacement of the Bin
111 for the Ice Machine.

- 112
113 2. Ratification of the Replacement of the Circuit Breaker Proposal
114

115 On MOTION by Ms. Shella, seconded by Mr. DeFilippo, with all in
116 favor, the Board ratified the Replacement of the Circuit Breaker
117 Proposal.

118
119
120 **EIGHTH ORDER OF BUSINESS Supervisor Requests**

121 Mr. Niles has an upcoming meeting with LMP on behind projects. Mr. Delagi proposed to
122 relocate the AED to the fitness center for two weeks while a cold front is present. The
123 Board agreed. Mr. Krauss- Will follow up with Envera regarding the credit from October
124 2025. Ms. Shella informed the board that the pool vendor is still not actively logging at the
125 pool.
126

127 **NINTH ORDER OF BUSINESS Chairperson’s Comment**

128 Mr. DeFilippo made a motion to stay a W2 District.
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On MOTION by Mr. DeFilippo, seconded by Ms. Shella, with all in favor, the Board agreed to stay as a W2 District.

TENTH ORDER OF BUSINESS

Audience Comments – 3 Minute Time Limit

There being no audience comments, the next order of business followed.

ELEVENTH ORDER OF BUSINESS

Adjournment

There being no further business, Adjournment: 11:55am Liz/Bob

On MOTION by Ms. Shella, seconded by Mr. Delagi, with all in favor, the meeting was adjourned at 11:55 a.m. (5-0)

James DeFilippo
Chairperson