

The Hammocks Community Development District

July 30, 2026

Agenda Package

2005 PAN AM CIRCLE, SUITE 300
TAMPA, FL 33706

CLEAR PARTNERSHIPS



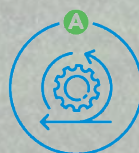
COLLABORATION



LEADERSHIP



EXCELLENCE



ACCOUNTABILITY



RESPECT

The Hammocks Community Development District

Board of Supervisors

Frances Plantikow, Chairman
Mike Henke, Vice Chairperson
Alex Manero, Assistant Secretary
Keiton Best, Assistant Secretary
Eva Sahakian, Assistant Secretary

District Staff

Kristee Cole & Lee Graffius, District Manager
Whitney Sousa, District Counsel
Robert Dvorak, District Engineer
Christian Haller, District Accountant
Diana Kapatsyna, District Admin

Special Meeting Agenda

Thursday, July 30, 2026, at 8:00 a.m.

The Regular Meeting of The Hammocks of District Community Development District will be held on July 30, 2026 at 8:00 a.m. at the Brentwood Clubhouse, 8504 Sandpiper Ridge Avenue, Tampa, Florida 33647. Please let us know at least 24 hours in advance if you are planning to call into the meeting. Following is the Agenda for the Meeting:

Meeting ID: 234 972 172 543 5

Passcode: qq3ot6fc

Dial-in by Phone: +1 646-838-1601

Pin: 786 317 492#

THE REGULAR MEETING OF BOARD OF SUPERVISORS

1. CALL TO ORDER/ROLL CALL

2. PUBLIC COMMENTS

(Each individual has the opportunity to comment and is limited to three (3) minutes for such comment)

3. BUSINESS ITEMS

A. Presentation of District Management Services

i. Presentation by GMS

ii. Presentation by Kai

iii. Presentation by Rizzetta & Company

iv. Presentation by Inframark

4. BOARD OF SUPERVISORS REQUESTS AND COMMENTS

5. ADJOURNMENT

Exhibit A
The Hammocks Community Development District
Scope of Services for District Management Services

All services required for the management of a community development district under Chapter 189, Florida Statutes, Chapter 190, Florida Statutes and all other applicable Federal, Florida, and local laws (including the ordinance(s) and resolution(s) relating to the District and any interlocal agreements). All services should be completed on a timely basis.

A. Meetings, Workshops, and Hearings

1. Organize, attend, conduct, and provide minutes for all meetings, workshops, and hearings of the District.
2. Schedule such meetings, workshops, and hearings.
3. Coordinate the time, location, and all other necessary logistics (including providing conference call numbers or telephonic or virtual meeting technology).
4. Send or publish notices for meetings, workshops, hearings, and elections pursuant to Florida law.
5. Provide agenda packages and meeting materials in the form requested by the Board.

B. District Operations

1. Act as the primary point of contact for District-related matters.
2. Maintain an action item list of tasks and follow ups from meetings.
3. Coordinate with the District's ADA document remediation vendor (and website vendor) to ensure the District's website has the content required by Florida (and is on the website for the appropriate duration) and includes any additional information or materials requested by the Board.
4. Consult with and advise the Board on policies, services, and responsibilities of the District and implement the Board's policies and direction.
5. Make recommendations and assist in matters relating to solicitation (competitive bidding, request for proposals, request for qualifications, etc...), approval, rejection, amendment, expiration, renewal, and termination of contracts for services, goods, supplies, or materials in accordance with the District's rules and Florida law.
6. Provide contract administration services. Such services include:
 - i. ensuring District vendors comply with the terms and conditions of a contract
 - ii. coordinating any changes to the contract that might occur over the course of the contract
 - iii. coordination with the District Engineer, District Counsel, or construction/project manager with respect to the work performed or contractual obligations
 - iv. coordinating the closeout/final payment after the vendor performed their services
7. Perform regular on-site visits to District grounds to generally evaluate and inspect the condition of the property and infrastructure and meet with District vendors and staff. Observe and report concerns or questions relating to District grounds.
8. Monitor certificates of insurance as needed per contracts.
9. Prepare and follow risk management policies and procedures.

Exhibit A
The Hammocks Community Development District
Scope of Services for District Management Services

10. Recommend and advise the Board, in consultation with the District Engineer of the appropriate amount and type of insurance and be responsible for procuring all necessary insurance.
11. Process and assist in investigation of insurance claims, in coordination with District Counsel.
12. Negotiate on behalf of the District (when specifically authorized by the Board) with governmental entities, vendors, contractors, residents, insurance representatives, and other parties.
13. Coordinate procurement and renewal of all applicable insurance, including but not limited to, General Liability Insurance and Directors and Officers Liability Insurance, ensuring all District assets and maintenance responsibilities are included.
14. Prepare, on or before October 1st of every year, an annual inventory of all District owned tangible personal property and equipment in accordance with all applicable rules and standards.
15. Ensure compliance with all statutes affecting the District by performing the following tasks (and such other tasks required by law but not specifically identified herein):
 - i. file the name and location of the Registered Agent and Registered Office location annually with Department of Economic Opportunity and the County.
 - ii. provide the regular meeting schedule of the Board to the County.
 - iii. prepare and file annual public depositor report.
 - iv. file all required financial reports (including the Annual Audit) to the Department of Revenue, Auditor General, the County, and other governmental agencies with jurisdiction in compliance with Florida law.
 - v. transmit Public Facilities Report and related updates to appropriate agencies.
 - vi. file request letter to the local Supervisor of Elections for number of registered voters as of April 15, each year. Report annually the number of registered voters in the District by June 1, of each year.
 - vii. serve as the contact person for the State Commission of Ethics for Financial Disclosure coordination.
 - viii. maintain the District Seal.

C. Accounting, Reporting, and Audit Support

1. Implement an integrated management reporting system compliant with Generally Accepted Accounting Principles (GAAP) and Government Accounting Standards Board (GASB) for government and fund accounting which will allow the District to represent fairly and with full disclosure the financial position of the District. The District's accounting activities should be overseen by a degreed accountant.
2. Track and oversee the District's general, capital, reserve, and bond fund activities and provide monthly and annual financial statements (including budget to actual summary).
3. Administer the processing, review, approval, and timely payment of all bills, invoices, and purchase orders (including construction requisitions).
4. Recommend and implement investment policies and procedures pursuant to Florida law, and provide cash management services to obtain maximum earnings for District operations through investment of surplus funds to the State Board of Administration.

Exhibit A
The Hammocks Community Development District
Scope of Services for District Management Services

5. Prepare reports as appropriate under applicable law, accounting standards, and bond trust indenture requirements.
6. Provide audit support to auditors for the required Annual Audit and ensure completion of the Annual Audit and Annual Financial Statements in compliance with Florida law.

D. Budgeting

1. Prepare and provide for a proposed budget for Board approval and submission to the County in compliance with Florida law.
2. Prepare final budget and backup material for and present the budget at all budget meetings, workshops, and hearings.
3. Administer the adopted budget and prepare budget amendments on an ongoing basis as necessary.

E. Assessments & Revenue Collection

1. Develop and administer the annual assessment roll for the District. This includes administering the tax roll for the District for assessments collected by the County tax collector and administering assessments for off tax roll parcels/lots.
2. Provide payoff information and pre-payment amounts as requested by property owners and collect prepayment of assessments as necessary.
3. Issue estoppel letters as needed for property transfers.
4. Maintain the District's Lien Book, in which is recorded the details of any District debt and the related debt service assessments. The Lien Book will account for all District debt and show the allocation of debt principal to assessed properties within the District.

F. Bond Compliance and Dissemination Agent

1. Oversee and implement bond issue related compliance. For example:
 - i. coordination of annual arbitrage report as required.
 - ii. transmittal of the Annual Audit, budget, and other required information to the trustee and other parties as required.
 - iii. annual/quarterly disclosure reporting as required.

G. Records

1. Maintain the "Record of Proceedings" for the District at a location within the boundaries of the local government in which the District is located and include meeting minutes, resolutions, and other records required by law and provide access to such records in compliance with Florida's public records laws.
2. Serve as the District's Records Management Liaison Officer for reporting to the Department of Library and Archives pursuant to Section 257.36(5)(a), Florida Statutes.
3. Serve as the District's designated custodian of all public records of the District and comply or coordinate the compliance with the responsibilities imposed by Chapter 119, Florida Statutes. For example:
 - i. protect the integrity, confidentiality, or exemption of all public records.
 - ii. respond to public records requests in a timely, professional, and efficient manner.

Exhibit A
The Hammocks Community Development District
Scope of Services for District Management Services

- iii. recommend best practices and services to ensure all public records of the District (including emails of the Board) are preserved pursuant to Florida law requirements.

The Hammocks Community Development District
Solicitation of Proposals for District Management Services

I. General Information.

The Board of Supervisors (“**Board**”) of The Hammocks Community Development District (“**District**”), a community development district (“**CDD**”) located in Tampa, Florida is soliciting proposals for the provision of district management services on a continuing basis (“**Proposals**”). The cost of such services is anticipated to be well below any competitive procurement thresholds and requirements. All proposers should be experienced in the professional management of CDDs 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.

The District owns and maintains the stormwater management system, landscape buffers, certain walls/fences and certain recreational facilities including a playground and basketball court within the community. The amenity is owned by the HOA.

The District typically schedules 12 meetings per year. More information about the District is available on its website: <https://thehammockscdd.com/>

II. Questions should be Directed to District Counsel. Any questions relating to this solicitation should be directed to District Counsel:

Straley Robin Vericker
Attn: Whitney Sousa
813.419.1415
wsousa@srvlegal.com
1510 W. Cleveland Street
Tampa, Florida 33606

III. Submittal of Proposals.

- a. Interested persons and firms should submit an electronic copy of their Proposal containing the information and materials described herein to District Counsel at the above email address no later than **11:00 a.m., Friday, July 3, 2026.**
- 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.

IV. Shortlist Review and Invitation to Present to the Board. The Board will review the proposals at their regularly scheduled meeting on **Wednesday, July 8, 2026** and make a shortlist of the proposers they will invite to present at a Special Meeting scheduled for **Thursday, July 30, 2026 at 8:00 a.m.** The Board reserves the right to reschedule the date of the presentations to another date, and if so, will provide appropriate notice. After the Board determines the shortlist, the District Counsel will schedule the invited proposers for 30-minute slots to include a presentation and a question and answer period. The District Counsel will provide the schedule to the invited proposers and notify rejected bidders (if any) of the Board’s decision not to proceed. The Board requests that the proposed District Manager attend the presentation.

V. Scope of Services. The district management services are generally described in the “**Scope of Services**” attached hereto as **Exhibit A** and is intended to incorporate all services that are necessarily

The Hammocks Community Development District
Solicitation for Proposals for District Management Services

performed by a management firm in the effective operation of a CDD in compliance with federal, state, or local regulation. If a specific task is not identified in the Scope of Services, but is necessary for the effective operation of the District or compliance with federal, state, or local regulation, it is expected that the management firm will include such task in the performance of its general management duties unless an additional charge is identified in the Proposal and agreed to by the District in writing.

- VI. 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 Counsel to all known proposers who have shown interest in submitting a Proposal.
- VII. Term and Renewal.** The initial term of the agreement for district management services 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.
- VIII. Submittal Requirements.** Each Proposal shall include the following information:
- a. **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
 - viii. List of any outstanding litigation that would threaten the viability of the proposer or the performance of services
 - b. **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. Staff team the proposer will assign to the District, including:
 - 1. the name, title, number of years’ service, specific services each will have primary responsibility over, and relevant educational and work experiences
 - 2. for the proposed “**District Manager**” include:
 - a. number of CDDs they are responsible for
 - b. names of the CDDs they represent nearest to the District
 - c. length of career in serving as a District Manager
 - d. professional designations (if any)
 - iv. How often site visits will be performed and how often the District Manager will meet with District vendors
 - v. How any issues arising after business hours will be handled
 - vi. Backup plan for situations where the District Manager is unavailable
 - vii. Escalation procedures and contact information if there are any concerns regarding the assigned District Manager or staff

The Hammocks Community Development District
Solicitation for Proposals for District Management Services

- c. **Cost of Services.** All proposers must submit a cost proposal for the Scope of Services (inclusive of all direct and non-direct costs as well as all overhead, fees and profit). Cost proposals should be written so that they may be incorporated, as modified during negotiations, as an attachment to an agreement. Each cost proposal must include the following:
- i. The total annual cost of all services described in the Scope of Services (“**Total Annual Price**”)
 1. if the Total Annual Price will be broken down in equal monthly installments, list the monthly installment that will be invoiced
 2. if the Total Annual Price will be broken down in another manner, list such breakdown and include the pricing and when such services will be invoiced
 - ii. A detailed listing of any other expenses or fees to be reimbursed to the proposer (excluding those additional services provided below) such as postage, courier services, printing, binding, travel expenses, etc.. Any expenses not specifically included will not be eligible for reimbursement and must be absorbed by the Total Annual Price.
 - iii. A fee proposal and detailed explanation for additional services that may be performed in addition to the items described in the Scope of Services.
 1. The fee proposal must clearly identify what types of services will be separately billed to the District, as opposed to those that are included in the Total Annual Price.
- d. **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.

IX. 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.

- X. 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. Ability of the proposer
 - c. Experience of the proposer
 - d. Geographic location of the proposer's headquarters or local office in relation to the District
 - e. Past performance of the proposer in other CDDs
 - f. Willingness to meet time and budget requirements
 - g. Recent, current, and anticipated workloads
 - h. Volume of work previously awarded to the proposer
 - i. Reasonableness of cost for the total effort
 - j. The District reserves the right to consider other factors and the criteria included herein shall constitute the minimum criteria to be considered

- XI. 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.

XII. Method of Selection, Award, and Right to Reject.

The Hammocks Community Development District
Solicitation for Proposals for District Management Services

- 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 a service 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 agreement for district management services will be sent to the District Counsel to review and approve prior to execution.

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

XIV. Required Disclosure:

- a. **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.
- b. **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.
- c. **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.
- d. **Public Records:** All Proposals are considered public records pursuant to Chapter 119, Florida Statutes.

Thank you for your interest in the District.



Governmental Management Services

Serving Florida's Communities

July 3rd, 2026

The Hammocks Community Development District Board of Supervisors
c/o Ms. Whitney Sousa, District Counsel
Straley Robin Vericker
1510 West Cleveland Street
Tampa, Florida 33606
Via email to WSousa@srvlegal.com

RE: Proposal for District Management Services

Dear Ms. Sousa,

Governmental Management Services-Tampa L.L.C. ("GMS") is pleased to provide for your review our Proposal associated with providing District Management Services to the The Hammocks Community Development District ("CDD"). We believe the Proposal demonstrates that we are the best choice for this project. Here are some of the reasons why:

- ❖ We are the leader in the Community Development District industry. We provide district management services to 290+ CDDs across the State of Florida.
- ❖ We have a team of management, financial, administrative, and operations professionals who are extremely qualified to provide these services and meet time and budget requirements.
- ❖ We have a proven approach, methodology, and philosophy towards providing these services that reflect our commitment and ability to deliver comprehensive services that exceed the expectations of our clients.
- ❖ We also have the ability to respond to individual client needs efficiently, effectively, and professionally. Our approach to providing the services for each of the responsibilities described in this RFP is to fully understand them and provide them in a manner that meets all the statutory requirements, customized to the approach preferred by the Board of Supervisors.

We thank you for this opportunity to submit our Proposal and would be happy to provide any additional information if requested. Please feel free to contact me at (865) 603-5101 or via email at DMossing@gmstnn.com if you have any questions or need additional information.

Sincerely,

Darrin Mossing

Darrin Mossing
GMS President

Enclosures

ORLANDO

219 E. Livingston St.
Orlando, FL 32801
(407) 841-5524

JACKSONVILLE

1200 Riverplace
Boulevard, Suite 705
Jacksonville, FL 32207
(904) 288-7667

ST. AUGUSTINE

50 Ellis Street,
Suite 208
St. Augustine, FL 32095
(904) 288-7667

ST. AUGUSTINE

475 West Town Place,
Suite 114
St. Augustine, FL 32092
(904) 288-7667

FT. LAUDERDALE

5385 N. Nob Hill Road
Sunrise, FL 33351
(954) 721-8681

TAMPA

4530 Eagle Falls Place
Tampa, FL 33619
(813) 344-4844

PALM COAST

393 Palm Coast
Parkway SW, Suite 4
Palm Coast, FL 33137
(904) 940-5850

KNOXVILLE

1001 Bradford Way
Kingston, TN 37763
(865) 717-7700

District Management Services Proposal Prepared For The The Hammocks Community Development District:



GOVERNMENTAL MANAGEMENT SERVICES-TAMPA, LLC

DISTRICT
MANAGEMENT
SERVICES



www.govmgtsvc.com

Submitted
July 3rd, 2026

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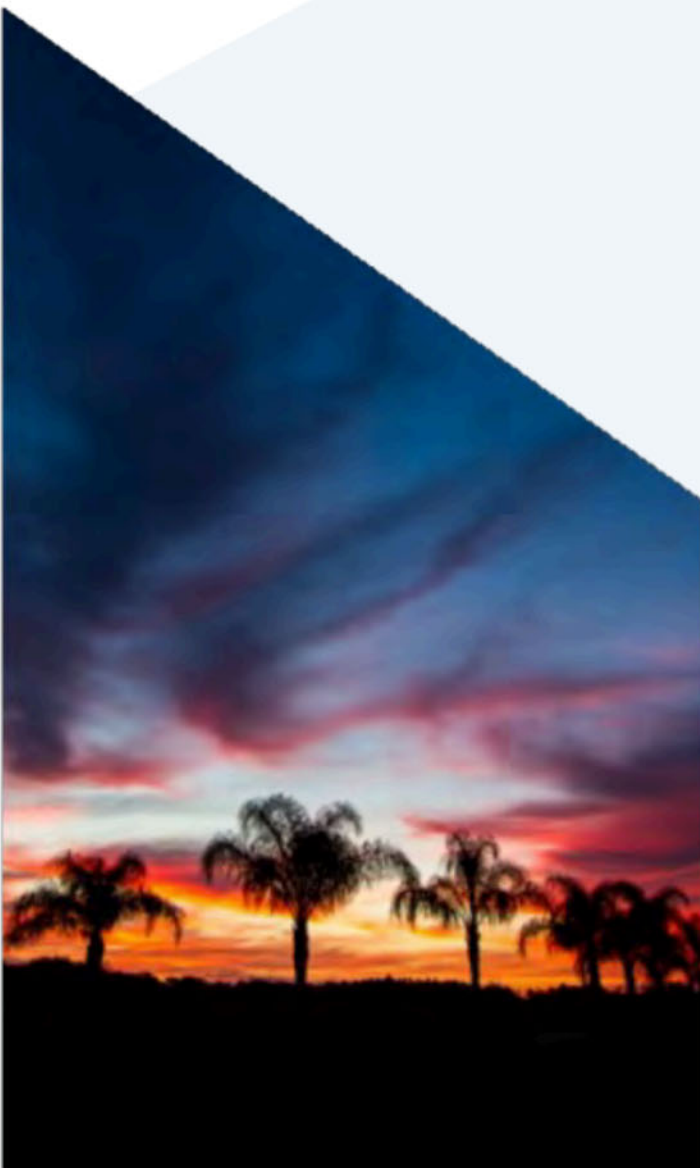
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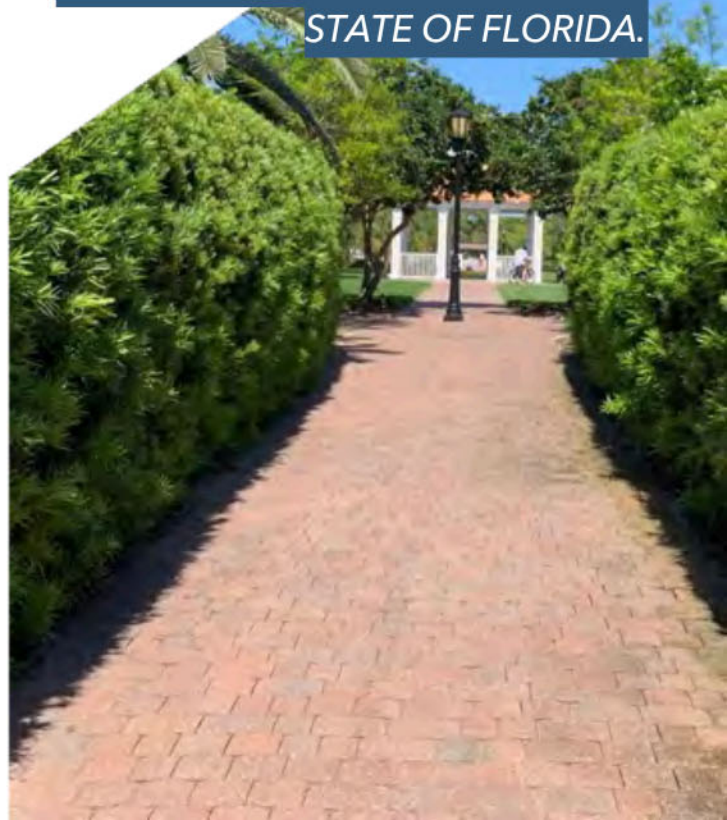


COMPANY INFORMATION

Governmental Management Services ("GMS") is a family of limited liability companies that was established for the purpose of providing district management services to Special Taxing Districts. With encouragement from industry professionals and the development community, GMS was created to provide an alternative to the existing district management companies. GMS currently has offices in St. Cloud, Orlando, Tampa, Sunrise, Miami, Tallahassee, Port St. Lucie, St. Augustine, Palm Coast, Florida, and Knoxville, Tennessee. Company personnel who would be providing services are generally determined by geography of the District and required services. However, everyone at GMS works together to provide the most efficient, effective and comprehensive management services possible. GMS currently manages over 290 Community Development Districts across the State of Florida and fully understands the requirements of Chapter 190. As described in Section 3, the personnel at GMS are very well known and respected by people involved with Community Development Districts. Many of the personnel have worked with Investment Bankers, Bond Counsel, District Counsel, Engineers, Developers, and Boards of Supervisors across the State of Florida.

They have provided management, financial, administrative, and operational services to over 290 special taxing districts and homeowners associations. Our greatest strength is our ability to respond to individual client needs quickly, efficiently and professionally.

**GMS WAS ESTABLISHED TO
PROVIDE THE MOST EFFICIENT,
EFFECTIVE AND
COMPREHENSIVE MANAGEMENT
SERVICES FOR COMMUNITY
DEVELOPMENT DISTRICTS IN THE
STATE OF FLORIDA.**



HOW WE WORK

Established in 2004, Governmental Management Services has over 250 full-time and part-time employees and has offices across the State of Florida. Services are provided by seasoned professionals with well over 1,000 years of combined Community Development District management experience. Our commitment to serving our clients and providing the most efficient, effective, and comprehensive management services for Community Development Districts continues to fuel our growth.

Statement of Qualifications

GMS is the best-qualified provider of district management services because of the experience of the personnel who will be providing the management services for the District. GMS brings a wealth of experience in management, administration, accounting, financial reporting, field operations, and assessment certifications.

GMS focuses exclusively on the services necessary for the proper management of Community Development Districts. Our staff includes managers, accountants, financial analysts, recording secretaries, and operations managers all with experience with Community Development Districts and other special districts. We offer integrated management services including:

- General Management
- Recording Secretary Services
- Accounting and Financial Reporting
- Assessment Roll Administration
- Field Operations Management
- Amenity Management
- Facility Maintenance
- Dissemination Agent Services
- Utility Billing
- Other Services

FULLY INTEGRATED SERVICES



These management services are being provided by the principals of GMS to over 290 Community Development Districts in 25 counties across the State of Florida.

OUR VALUES

MISSION

The goal of GMS is to provide the most efficient, effective, and comprehensive management services for Community Development Districts in the State of Florida.



CORE VALUES

Governmental Management Services' greatest strength is its ability to respond to individual client needs quickly, efficiently, and professionally. Listed below are our GMS core values:



Customer Commitment

We keep customer needs at the center of all that we do to provide a superior customer experience.



Integrity

We are honest, open, ethical, and fair.

People trust us to do what's right.



Teamwork

We win together, not alone.

We work together, across divisions, to meet the needs of our customers.



Passion and Drive

We are proud of the services we provide.

We play to win and strive to help our customers do the same.



Empower Individuals

Our employees set us apart.

We value our employees, encourage their development, and reward their performance.



Quality

Details matter.

We provide consistent and unsurpassed service that, together, deliver premium value to our customers.

CONTACT INFORMATION

Corporate Office:

1001 Bradford Way
Kingston, TN 37763
(865) 717-7700

As the largest CDD Management firm in the State of Florida, GMS is prepared to provide all CDD Management services directly and does not contemplate the need to subcontract services.

GMS - South Florida

5385 Nob Hill Road
Sunrise, FL 33351
(954) 721-8681

GMS - Central Florida

219 E. Livingston St.
Orlando, FL 32801
(407) 841-5524

GMS - Tampa

4530 Eagle Falls Place
Tampa, Florida 33619
(813) 344-4844

435 10th Avenue West,
Suite 200
Tampa, Florida 34221

GMS - North Florida

475 West Town Place,
Suite 114
St. Augustine, FL 32092
(904) 940-5850

1200 Riverplace
Boulevard
Jacksonville, FL 32207

393 Palm Coast
Parkway SW, Suite 4
Palm Coast, FL 32137

We have additional satellite offices
throughout the State of Florida



GOVERNMENTAL MANAGEMENT SERVICES

DARRIN MOSSING
PRESIDENT

KEITH NELSON
CHIEF OPERATING
OFFICER

HUMAN RESOURCES • RECRUITING • TRAINING
COMPLIANCE • CORPORATE FINANCE

RIVERSIDE (NF)
AULSON MOSSING
VICE PRESIDENT

SOUTH FLORIDA
PATI POWERS
VICE PRESIDENT

CENTRAL FLORIDA
GEORGE FLINT
VICE PRESIDENT

NORTH FLORIDA
JIM OLIVER
MANAGING PARTNER

TAMPA
JASON GREENWOOD
MANAGING PARTNER

FIELD OPERATIONS

- RICHARD GRAY
- CHRISTIAN DELLINGER
- JEFF JOHNSON
- JAMES SCHIESZER

AMENITIES

- TIMI WRIGHT
- NATALIE CLEM
- MARIA CRANFORD
- ROBERT ALBA
- FREDDIE OCA
- KAYLA RIKER
- & 18 OTHERS

ACCOUNTING

- PATI POWERS, VP
- TIZIANA CESSNA
- SHANNON RINKUS
- ASHLEY COOPER
- NIKI MARINO
- JENNIFER WASSERMAN, CPA
- SHEIK NEERPOO

DISTRICT MANAGEMENT

- PAUL WINKELJOHN
- JULIANA DUQUE
- ANDREW GILL
- PATRICK BURGESS
- ANDRESSA PHILLIPS
- BEN QUESADA
- JESUS LORENZO

ACCOUNTING

- KATE COSTA, DIRECTOR
- TERESA VISCARRA
- LINDA RAUOLD
- LISA CRUZ
- NANCY SOLER
- ZUNY YAN
- CAROL WRIGHT
- & 6 OTHERS

DISTRICT MANAGEMENT

- JILL BURNS, MANAGING PARTNER
- JASON SHOWE
- TRICIA ADAMS
- JEREMY LEBRUN
- ROB SZOZDA

ACCOUNTING

- OKSANA KUZMUK
- BERNADETTE PEREGRINO
- TODD POLVERE
- TARA LEE
- SUSAN FERRERO

DISTRICT MANAGEMENT

- MATTHEW BAGETTI
- CORBIN DENAGY
- MARLEE GILES
- DANIEL LAUGHLIN
- JAMES PERRY

ACCOUNTING

- SHARYN HENNING, CPA
- HANNAH HENRY
- LEAH POPELKA
- SAVANNAH SZOZDA
- ALEXANDRA WOLFE, CPA

DISTRICT MANAGEMENT

- JASON GREENWOOD
- AMANDA FERGLUSON
- RICHARD McGRATH
- BRIAN YOUNG

MAINTENANCE

- TIMOTHY CARTER
- LUTHER NEWTON
- MARK CESSNA & 13 OTHERS

LIFEGUARDS & POOL ATTENDANTS

- 30 - 50 OTHERS ON SEASONAL AND/OR FLEX SCHEDULES

ASSESSMENT ADMINISTRATION

- RICHARD HANS, VP
- DARRIN MOSSING JR
- DANIEL HARVEY

ADMINISTRATION

- JENNIFER MCCONNELL
- LATOYA FLOWERS
- ELLEN ACOSTA
- REGINE LUCAS
- & 2 OTHERS

ASSESSMENT ADMINISTRATION

- DARRIN MOSSING JR.

ADMINISTRATION

- STACEE VANDERBILT, DIRECTOR
- SAMANTHA HAM
- & 8 OTHERS

ASSESSMENT ADMINISTRATION

- SHERYL FULKS
- DARRIN MOSSING, JR.
- MARISSA SMARTO

ADMINISTRATION

- COURTNEY HOGGE
- LISA PELKEY
- SARAH SWEETING
- KATELYN BEACH

ASSESSMENT ADMINISTRATION

- MICHAEL CORTESE
- BRADFORD NELSON

ADMINISTRATION

- NICOLE VIGBITO
- REBECCA SANTOS
- SAVANNAH SZOZDA

FIELD OPERATIONS

- PAT SZOZDA
- PATRICK BURGESS
- JASON GITEL
- JULIO PADILLA

AMENITIES

- 7-15 DISTRICT EMPLOYEES FLEX SCHEDULES

FIELD OPERATIONS

- ALAN SCHEERER
- CLAYTON SMITH
- MARSHALL TINDALL
- ROB SZOZDA JR.
- & 4 OTHERS

AMENITIES

- MARCIA CALLEJA
- CHRISTINE WELLS
- ALEXANDRA PELMAGGS
- & 11 OTHERS

FIELD OPERATIONS

- JAY SORIANO
- ROBERT BERLIN
- CHRISTIAN DELLINGER
- TERRY GUYNN

AMENITIES

- KELLY MULLINS
- DANIELLE DEBARCO
- RYAN WILSON
- 7-15 DISTRICT EMPLOYEES FLEX SCHEDULES

FIELD OPERATIONS

- CLAYTON SMITH
- MICK SHEPPARD
- GARETT DUBOIS
- MATT AZRIEL

AMENITIES

- KAYLEE SANTANA
- DREAMA LONG
- MIRANGELY HIRALDO
- & 14 OTHERS

MAINTENANCE

- ANGEL GUZMAN
- JULIO COLON
- ABNER DEJESUS
- JOSE SOTO
- & 3 OTHERS

INFORMATION TECHNOLOGY

- DAN BRADLEY

MAINTENANCE

- GARETT DUBOIS
- STEVEN WENTZ
- JEFF BACHELOR
- & 3 OTHERS

MAINTENANCE

MAINTENANCE

MAINTENANCE



OUR TEAM



Although technology has tremendously impacted how services are provided for nearly every business today, GMS realizes an organization is only as good as the individuals working within it. If an organization is not able to retain hardworking, knowledgeable and dedicated employees that understand their client's needs, it is most certain to fail. It is for this reason that GMS has focused a significant effort on recruiting and retaining the best in the district management industry

STATEMENT OF STAFF CONSISTENCY

The District Management Team proposed remains the same for the duration of the contracts. Any changes in the District Management Team will be discussed and approved by the Boards of Supervisors. Members of the management team have worked together for years, and there is complete trust and loyalty in their abilities to provide the most efficient, effective and professional management services possible. In addition, these types of long-term personal relationship among GMS staff are reassuring to our clients because personnel turnover in any organization is extremely detrimental to its ability to provide the necessary services.

"GMS realizes an organization is only as good as the individuals working within it."

Proposed GMS District Management Service Team

Trusted & Service Oriented



Jason Greenwood
Partner,
District Manager



Alex Wolfe, CPA
District Accounting



Richard McGrath
District Manager



Nicole Viverito
District Administration

GMS-TAMPA
JASON GREENWOOD
MANAGING DIRECTOR

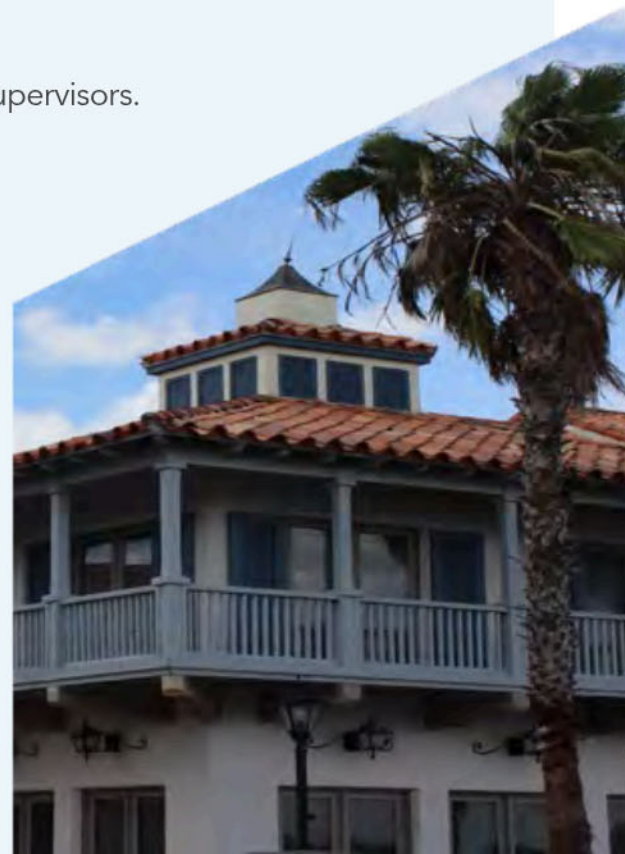
See Page 7
Of Our Proposal
For The Rest
Of The
GMS Organization

DISTRICT MANAGEMENT :	DISTRICT ACCOUNTING :	DISTRICT ADMINISTRATION :	ASSESSMENT ADMINISTRATION :	DISTRICT AMENITY MANAGEMENT :	DISTRICT FIELD OPERATIONS :	DISTRICT FIELD MAINTENANCE :
• JASON GREENWOOD • AMANDA FERGUSON • RICHARD MCGRATH • BRIAN YOUNG	• SHARYN HENNING CPA • HANNAH HENRY • LEAH POPELKA • SAVANNA SZOZDA • ALEXANDRA WOLFE, CPA	• NICOLE VIVERITO • SAVANNAH • SZOZDA • REBECCA SANTOS	• DARRIN MOSSING JR. • MICHAEL CORTESI • LEAH • POPELKA	• KAYLEE SANTANA • DREAMA LONG • MARANGELY HIRALDO	• CLAYTON SMITH • MICK SHEPARD • GARETT DUBOIS • MATT AZRIEL	• JEFF BACHELOR • GARETT DUBOIS • STEVEN WENTZ • & 3 OTHERS

DISTRICT MANAGEMENT SERVICES

THE FOLLOWING MANAGEMENT SERVICES ARE TYPICALLY PROVIDED TO ENSURE THE DISTRICT OPERATES IN ACCORDANCE WITH ALL APPLICABLE STATUTES, LAWS, RULES AND REGULATIONS:

- Attend, record, and conduct all regularly scheduled Board of Supervisors Meetings including landowners' meetings, continued meetings, and workshops.
- Present the District's annual budget in accordance with Chapter 190, Florida Statutes.
- Ensure the District is in compliance with administrative and financial reporting for CDDs.
- Correspond and communicate with the Board of Supervisors and Staff to respond to the various needs of the District and Community.
- Review and approve agendas for circulation to the Board of Supervisors.
- Review and approve the annual budget, the annual audit, and monthly disbursements.
- Review annual insurance policy with the District so that it maintains proper insurance coverage.



EDUCATION

Ohio University, 1988,
Bachelor of Science,
Major: Accounting

EXPERIENCE

38+ Years

- President and Founder – GMS Organization
- Corporate Operations & District Management

DARRIN MOSSING

PRESIDENT

Darrin Mossing is the President and Founder of the GMS organization. Mr. Mossing graduated from Ohio University with a Bachelor's degree in accounting in June 1988 and began his career as a staff accountant on September 1, 1988, for the Indian Trace Community Development District. In November 2004, Mr. Mossing established the GMS organization, which has grown to over 290 CDDs, Homeowners Association, and other Special Taxing Districts across the State of Florida.

JASON GREENWOOD

MANAGING PARTNER

Jason Greenwood provides management services to CDDs and property owners associations throughout the State of Florida. Mr. Greenwood has been committed to GMS since 2017, is a licensed Community Association Manager, and operates out of the Tampa, Florida office. Mr. Greenwood has BA degrees in Business and Finance with a minor in Marketing from Ashford University in Clinton, Iowa, and an MBA in Business Administration, specialization in Finance, from Lynn University in Boca Raton, Florida.

EDUCATION

B.A., Business, Finance,
Marketing minor,
Ashford University
MBA, specialization in
Finance, Lynn University

EXPERIENCE

9+ Years

- District Management
- Assessment Roll Administration

RICHARD MCGRATH

DISTRICT MANAGER

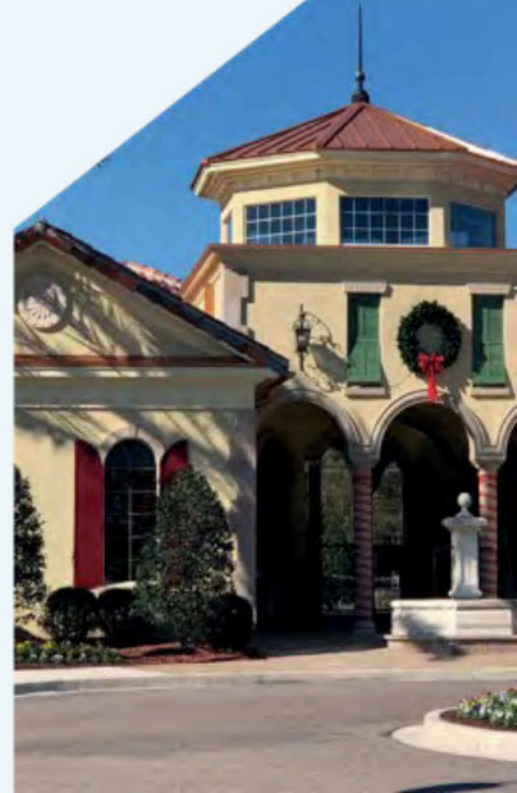
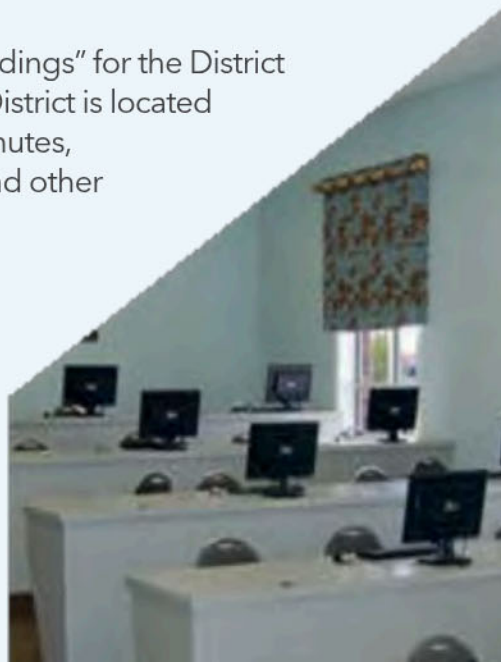
Richard McGrath also provides management services to CDDs throughout the State of Florida. Mr. McGrath is a licensed Real Estate Agent and operates out of our Tampa, Florida Office. He has a wealth of experience in customer service and management. Mr. McGrath earned his Bachelor's Degree in Business Administration from the University of Florida and continued his education by earning his Master's Degree in International Business also from the University of Florida.

ADMINISTRATIVE SERVICES

Amanda Ferguson leads our recording administration department. Amanda prepares agenda packages, meeting notices, public records administration, statutory compliance, and various other required administrative services. She is an Administration Management Professional, who has been committed to GMS since its establishment in 2004. Mrs. Ferguson has performed various functions in her 20+ years with GMS; including amenity center management at premier North Florida communities, contract compliance, managing programs and special events, lifeguard management, and transcription of board meetings. Mrs. Ferguson currently provides transcription and administrative services to 20 Community Development Districts in the Tampa Bay, Central Florida, and Southwest Florida Regions. **Nicole Viverito** joined the GMS organization in 2022 as a CDD Recording Administrator; she is known for her compliance discipline and customer service orientation.

THE FOLLOWING ADMINISTRATIVE SERVICES ARE TYPICALLY PROVIDED TO ENSURE THE DISTRICT OPERATES IN ACCORDANCE WITH ALL APPLICABLE STATUTES, LAWS, RULES AND REGULATIONS:

- Prepare agenda packages for transmittal to Board of Supervisors and staff seven days prior to Board of Supervisors' Meeting.
- Provide minutes for all Board of Supervisors' Meetings, including landowners' meetings
- Ensure compliance with all administrative statutes affecting the District which include but are not limited to :
 - Publish and circulate the annual meeting notice.
- Report annually the number of registered voters in the District by June 1 of each year.
- Maintain "Record of Proceedings" for the District within the County that the District is located which includes meeting minutes, agreements, resolutions, and other required records.
- Transmit Registered Agent information to Florida Commerce and local governing authorities.
- File Ordinance or Rule establishing the District to Florida Commerce.



ASSESSMENT ROLL CERTIFICATIONS & ADMINISTRATION

Darrin Mossing Jr, and Michael Cortese perform our assessment administration services for the Tampa, Central, and North Florida Divisions.

Our GMS Services Include:

- Develop and administer the annual assessment roll for the District. This includes administering the tax roll for the District for assessments collected by the County tax collector and administering assessments for off-tax roll parcels/lots.
- Provide payoff information and pre-payment amounts as requested by property owners and collect prepayment of assessments as necessary
- Issue estoppel letters as needed for property transfers.
- Maintain the District's Lien Book, which records the details of any District debt and the related debt service assessments. The Lien Book will account for all District debt and show the allocation of debt principal to assessed properties.



ACCOUNTING SERVICES

Alexandra Wolfe manages the accounting and financial reporting for our clients. She is a Certified Public Accountant with over 15 years of accounting and financial reporting experience with Community Development Districts across the State of Florida. Ms. Wolfe's experience includes financial statement preparation, payroll, budget preparation, preparation of annual audit reports, statutory and bond compliance. She has a Bachelor of Business Administration Degree in International Business from George Washington University. Ms. Wolfe also has experience as an auditor completing annual reports required for CDDs.

EDUCATION

B.S. in Information Management,
Masters in Business Management and Accounting

EXPERIENCE

13+ Years
• Accounting
• Financial Reporting

Hannah Henry has over 13 years of experience managing the accounting and financial reporting for our clients. Ms. Henry serves as District Accountant to 12+ CDDs and Homeowner Associations. She has a Bachelors Degree from the University of Tennessee with Information Management and has a Masters Degree from King University in Business Management and Accounting.

EDUCATION

B.A. in
International Business, George Washington University

EXPERIENCE

21+ Years, CPA
• Accounting
• Financial Reporting

THE FOLLOWING FINANCIAL SERVICES ARE TYPICALLY PROVIDED TO ENSURE THE DISTRICT OPERATES IN ACCORDANCE WITH ALL APPLICABLE STATUTES, LAWS, AND RULES AND REGULATIONS:

- Establish Governmental Fund Accounting System per the Uniform Accounting System prescribed by the Florida Department of Financial Services for Government Accounting. This system includes preparing monthly balance sheet and income statement(s) with budget to actual variances.
- Prepare accounts payable and present them to the Board of Supervisors for approval or ratification.
- Prepare annual budget for review and approval by the Board of Supervisors.
- Transmit the proposed budget to local governing authorities 60 days before adoption.
- Prepare year-end adjusting journal entries in preparation for the annual audit by an Independent Certified Public Accounting Firm.
- Maintain checking accounts with qualified public depository selected by the Board of Supervisors.
- Ensure compliance with financial and accounting statutes affecting the District which include but are not limited to:
 - Complete annual financial audit report within 9 months after the fiscal year end.
 - Circulate annual financial audit report and annual financial report to appropriate governmental agencies.
- Prepare annual public depositor report.
- Oversee and implement bond issue related compliance, i.e., coordination of annual arbitrage report, transmittal of annual audit and budget to the trustee, transmittal of annual audit to bond holders and underwriters, annual/quarterly disclosure reporting, etc.
- Transmit Public Facilities Report to the appropriate agencies
- Bind necessary insurance for the District, which includes liability, property, workers' compensation, etc.

OPERATIONS MANAGEMENT SERVICES

GMS provides operations/field management services to 80+ Districts throughout Florida under the direction of **Clayton Smith**. He has a deep, and lengthy family history connected to CDD management, and has owned and operated his own maintenance company in the Central Florida area which carried out various undertakings, primarily for CDDs. He is a proud alumnus of the Florida State University. **Mick Sheppard** is our Operations Maintenance Manager, overseeing maintenance projects and providing maintenance services. Mick is equipped and capable of handling almost all CDD maintenance needs and specializes in maintenance projects specific to CDDs. Mick has a lengthy background in various maintenance services including but not limited to plumbing, HVAC repair, grounds maintenance, and property maintenance.

PROPER OPERATION OF THE DISTRICTS INCLUDE:

- Administer and manage maintenance contracts for landscaping, stormwater, wastewater and reuse systems management
- Respond to resident and Board of Supervisors inquiries regarding Maintenance Operations
- Coordinate and implement maintenance projects throughout the community with vendors
- Conduct site visits (day and nighttime) to ensure satisfactory operation of the district and prepare periodic reports to the Board.
- Review and approve construction contracts, change orders, payment request, etc. during construction phase
- We can also develop landscaping RFPs as requested at an additional hourly or flat rate fee.

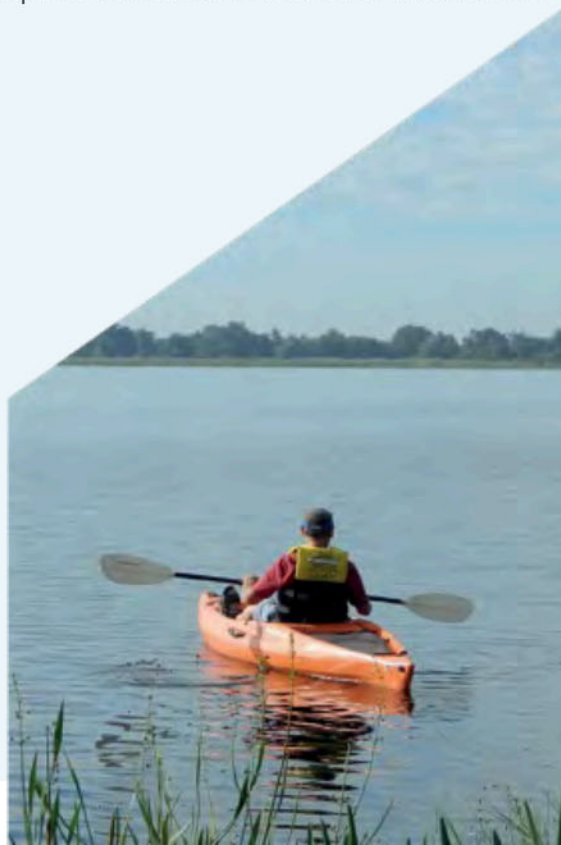
FACILITY REPAIR & MAINTENANCE SERVICES

GMS has an in-house Facility repairs and maintenance department providing fully insured maintenance services in Tampa, Central Florida, and North Florida territories. Small to medium-size maintenance requests are coordinated through the District Manager and/or Field Operations Manager at the direction of the Board of Supervisors.

AMENITY MANAGEMENT & LIFESTYLE PROGRAMMING

Kaylee Santana is the Assistant Director of Amenity Management in Tampa. Kaylee brings over five years of experience in Amenity Management and has proudly served as Assistant Director for the past two years. She holds a Bachelor's degree in Health Administration and Management from DeVry University. As the Training Manager for the Amenities Department at GMS-Tampa, Kaylee plays a key role in developing team members and ensuring operational excellence across multiple communities. Her strong foundation in CDD operations and proven leadership skills enable her to effectively guide and support a large, dynamic team.

Dreama Long is the Assistant Director of Amenity Management in Tampa. Dreama has a wealth of leadership and operational experience at GMS-Tampa. Before entering the field of amenity management, Dreama dedicated over 20 years to law enforcement in Norfolk, Virginia, with specialized expertise in narcotics, homicide, and hostage negotiation. After retiring from law enforcement, Dreama relocated to Florida and discovered a new passion in property management. She served as Chairman of her CDD Board for several years, gaining valuable insight into community operations and governance. Today, as Assistant Director of Amenity Services, Dreama applies her extensive leadership experience and problem-solving skills to guide the Amenities Department. She is committed to fostering a healthy, collaborative work environment and ensuring exceptional service across all communities.



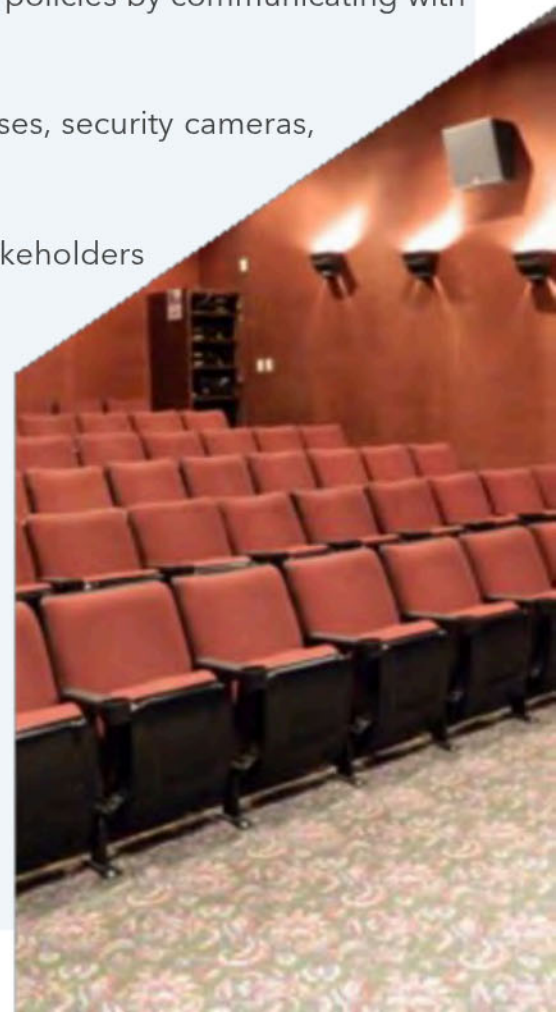
GMS has significant experience with highly amenitized CDD communities and is flexible regarding the approach taken to staffing, managing, and operating amenities. We typically see one of three approaches taken to amenity management:

- 1) District contracts with GMS for operations
- 2) District contracts with a third-party company for operations
- 3) District directly employs staff for operations

**UNDER THE FIRST APPROACH, THE FOLLOWING SERVICES ARE TYPICALLY PROVIDED
BY GMS TO ENSURE A FIRST CLASS, AMENITY CENTERED COMMUNITY:**

- Recruit, hire, train, and monitor Clubhouse and Facilities staff.
- Assume responsibility to manage a vibrant schedule of activities, events and lifestyle programming. GMS is structured to take a regional approach to serving its clients, but this structure does not preclude us from assigning the most talented and qualified individuals, regardless of their location, to appropriate roles.
- Communicate lifestyle opportunities and residential services information to owners and potential residents.
- Promote voluntary compliance with District rules, regulations and policies by communicating with residents.
- Maintain excellent level of customer service.
- Monitor the use of the amenities including resident barcode passes, security cameras, and other means of safeguarding the District.
- Maintain excellent level of customer service.
- Coordinate with vendors, contractors, internal and external stakeholders to ensure smooth operations of day to day and special activities.
- Maintain all relevant records of incidents, inspections, revenue, and other information as required by the District.
- Assist with budget preparation and reports, policy recommendations and enforcement, safety and/or security recommendations, collection of rental fees, maintaining records as needed.

Under the second and third approach, although the above services would not be provided directly by GMS, we would work to ensure that the contractor or direct employees were performing these and other necessary services.



SAMPLE SPECIAL EVENTS

Social events are for all residents and open to the public, and a critical component to the success of the community. Below are some examples of events currently provided at other communities that GMS has previously assisted in staffing.

SUMMER CAMP

Each week features an array of art activities, sports, games and a field trip. Campers are provided a t-shirt, daily snacks and extended care. A similar camp can also be provided during Spring Break.

FALL FESTIVAL

A fall celebration featuring hayrides, craft tables, carnival games, contests, bounce houses and other activities.

WINTER CELEBRATION

A holiday celebration including pictures with Santa, trolley rides, holiday decorations, cookies, hot chocolate and coffee.

KIDS NIGHT OUT/TEEN SCENE

DJ, games, food, drinks and more to entertain kids & teens.

ICE CREAM SOCIAL

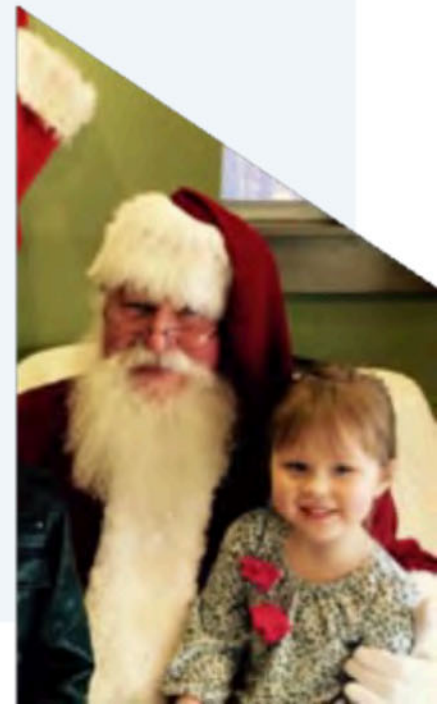
Ice cream and beverages with contests, raffles and games.

SPRING FLING

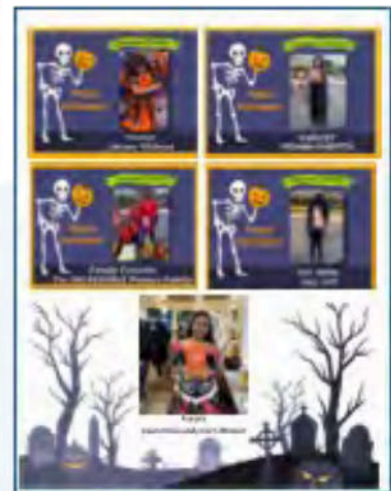
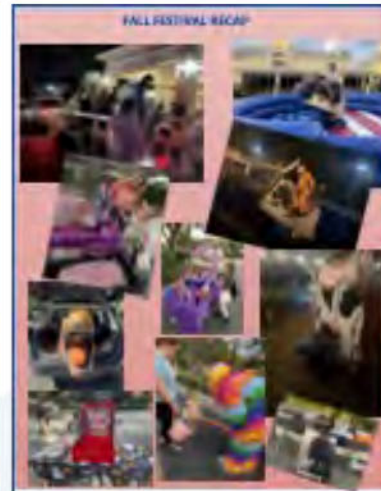
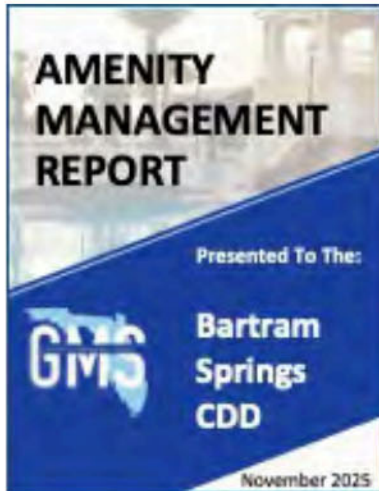
An Easter egg hunt, pictures with the Easter bunny and a petting zoo. Bounce house, dunk tank, etc. can also be provided.

DIVE-IN MOVIE

View a movie by the pool with snacks and beverages while you enjoy the show.



SAMPLE NEWSLETTER



REFERENCES

GMS prides itself on the timely delivery of quality services to its clients. As a result, our clients as well as the other CDD industry professionals have come to recognize and appreciate the quality of the services we provide. GMS encourages its prospective clients to call our references and learn what other district supervisors, developers, attorneys, engineers, and financial professionals are saying about us. The following table contains just a few of the clients and professionals who are pleased to serve as our references:

Glenn Roberts

Chair, Dupree Lakes CDD
22598 Cherokee Rose Place
Land O'Lakes, FL 34639
(502) 741-8013
seat4@dupreelakescdd.org

John Ford

Chair, Mirada CDD
31656 Cabana Rye Avenue
San Antonio, FL 33576
(516) 749-2322
johninmirada@gmail.com

Kristen Brooks

Chair, Belmont CDD
10109 Count Fleet Drive
Ruskin, FL 33573
(404) 723-1245
boardmember5@belmontcdd.com

Gerald Barkholz

Chair, Palms of Terra Ceia Bay CDD
2925 Terra Ceia Bay Blvd., Unit 2904
Palmetto, FL 34221
(941) 705-6329
jerrybarkholz@gmail.com

Paul Cilia

Chair, Forest Brooke CDD
5019 Grist Mill Court
Wimauma, FL 33598
(813) 419-8115
seat3@forestbrookecdd.org

Mark Hardee

Chair, Terra Bella CDD
23963 San Giovanni Drive
Land O Lakes, FL 34639
(301) 370-1183
terrabellacddseat5@gmail.com

GOVERNMENTAL MANAGEMENT SERVICES

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Table 2-1. District Management & Client Management Experience Summary

GMS Client #	GMS Client Name As of 2026-07-01	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
1	Aberdeen	St. Johns	✓	✓	✓		
2	Acacia Grove	Miami-Dade	✓	✓	✓		
3	Academical Village	Broward	✓	✓	✓		✓
4	Acree	Duval	✓	✓	✓		
5	Amelia Concourse	Nassau	✓	✓	✓		✓
6	Amelia Walk	Nassau	✓	✓	✓		✓
7	Anabelle Island	Clay	✓	✓	✓		✓
8	Armstrong	Clay	✓	✓	✓		
9	Astoria	Polk	✓	✓	✓		✓
10	Asturia	Pasco	✓	✓	✓		✓
11	Auburn Lakes	Brevard	✓	✓	✓		
12	Bahia Mar	Broward	✓	✓	✓		
13	Ballentrae Hillsborough	Hillsborough	✓	✓	✓		✓
14	Bannon Lakes	St. Johns	✓	✓	✓		
15	Banyan Drive Security Guard Spec	Miami-Dade	✓	✓			
16	Bartram Park	Duval	✓	✓	✓		
17	Bartram Springs	Duval	✓	✓	✓		✓
18	Bauer Drive	Miami-Dade	✓	✓	✓		
19	Bay Laurel Center	Marion	✓	✓	✓	✓	
20	Baytree	Brevard	✓	✓	✓		✓
21	Baywinds	Miami-Dade	✓	✓	✓		✓
22	Beacon Tradeport	Miami-Dade	✓	✓	✓		
23	Bella Collina	Lake	✓	✓	✓	✓	✓
24	Bella Tara	Osceola	✓	✓	✓		
25	Bellagio	Miami-Dade	✓	✓	✓		
26	Bellaviva	Osceola	✓	✓	✓		
27	Belmont	Hillsborough	✓	✓	✓		✓
28	Bent Creek	St. Lucie	✓	✓	✓		
29	Biscayne Drive Estates	Miami-Dade	✓	✓	✓		
30	Bonita Village	Lee	✓	✓	✓		
31	Bonnet Creek	Orange	✓	✓	✓		✓
32	Botaniko	Broward	✓	✓	✓		
33	Bradbury	Polk	✓	✓	✓		✓
34	Brandy Creek	St. Johns	✓	✓	✓		
35	Bridgewalk	Osceola	✓	✓	✓		✓
36	Bridgewater	Polk	✓	✓	✓		✓
37	By-The-Sea Security Guard Specia	Miami-Dade	✓	✓			
38	Campo Bello	Miami-Dade	✓	✓	✓		
39	Candler Hills East	Marion	✓	✓	✓		
40	Canopy	Leon	✓	✓	✓		✓
41	Capital Region	Leon	✓	✓	✓		
42	Captiva Erosion Prevention Distric	Lee	✓				
43	Central Lake	Lake	✓	✓	✓	✓	
44	Centre Lake	Miami-Dade	✓	✓	✓		✓
45	ChampionsGate	Osceola	✓	✓	✓		

CLIENT LISTING

www.govmgtsvc.com



GMS Client #	GMS Client Name As of 2026-07-01	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
46	ChampionsGate Condominium Pro	Osceola	✓	✓	✓		
47	ChampionsGate Villas Building 1 C	Osceola	✓	✓	✓		
48	Chapel Creek	Pasco	✓	✓	✓		✓
49	City of Coral Gables**	Miami-Dade	✓	✓			
50	Coastal Ridge	Duval	✓	✓	✓		
51	Coconut Cay	Miami-Dade	✓	✓	✓		✓
52	Cocoplum Lights	Miami-Dade	✓	✓			
53	Cocoplum Security Roving Special	Miami-Dade	✓	✓			
54	Copper Creek	St. Lucie	✓	✓	✓		✓
55	Copper Oaks	Lee	✓	✓	✓		
56	Coquina Shores	Flagler	✓	✓	✓		
57	Coral Bay	Broward	✓	✓	✓		✓
58	Coral Keys Homes	Miami-Dade	✓	✓	✓		
59	Cordova Palms	St. Johns	✓	✓	✓		✓
60	Cory Lakes	Hillsborough	✓	✓	✓		
61	Country Greens	Lake	✓	✓	✓		✓
62	County Road 33	Polk	✓	✓	✓		
63	Creekside	St. Lucie	✓	✓	✓		
64	Crossings	Osceola	✓	✓	✓		✓
65	Crossroads Village Center	Polk	✓	✓	✓		
66	Crosswinds East	Polk	✓	✓	✓		✓
67	Crosswinds West	Polk	✓	✓	✓		
68	Crystal Cay	Miami-Dade	✓	✓	✓		
69	Cypress Bluff	Duval	✓	✓	✓		
70	Cypress Cove	Broward	✓	✓	✓		✓
71	Cypress Park Estates	Polk	✓	✓	✓		✓
72	Cypress Ridge	Hillsborough	✓	✓	✓		✓
73	Darby	Duval	✓	✓	✓		✓
74	Davenport Road South	Polk	✓	✓	✓		✓
75	Deer Island	Lake	✓	✓	✓		✓
76	Deer Run	Flagler	✓	✓	✓		
77	Dewey Robbins	Lake	✓	✓	✓		
78	Double Branch	Clay	✓	✓	✓		✓
79	Dowden Central	Orange	✓	✓	✓		✓
80	Dowden West	Orange	✓	✓	✓		✓
81	Downtown Doral	Miami-Dade	✓	✓	✓		
82	Downtown Doral South	Miami-Dade	✓	✓	✓		✓
83	Dunes	Flagler	✓	✓	✓		
84	Dupree Lakes	Pasco	✓	✓	✓		✓
85	Durbin Crossings	St. Johns	✓	✓	✓		
86	Eagle Hammock	Polk	✓	✓	✓		✓
87	Eagle Trace	Polk	✓	✓	✓		
88	East 547	Polk	✓	✓	✓		✓
89	Eden Hills	Polk	✓	✓	✓		✓
90	Elevation Pointe	Orange	✓	✓	✓		

CLIENT LISTING

www.govmgtsvc.com



GMS Client #	GMS Client Name As of 2026-07-01	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
91	Enclave At Black Pointe Marina	Miami-Dade	✓	✓	✓		✓
92	Epmore	Miami-Dade	✓	✓	✓		
93	Estancia at Wiregrass	Pasco	✓	✓	✓		✓
94	Eureka Grove	Miami-Dade	✓	✓	✓		
95	Falcon Trace	Orange	✓	✓	✓		✓
96	Falls at Drake Pointe	Lake	✓	✓	✓		
97	Forest Brooke	Hillsborough	✓	✓	✓		✓
98	Founders Ridge	Lake	✓	✓	✓		
99	Fronterra	Collier	✓	✓	✓		
100	Gardens at Hammock Beach	Flagler	✓	✓	✓		
101	Golden Gem	Lake	✓	✓	✓		
102	Grand Oaks	St. Johns	✓	✓	✓		✓
103	Grande Pines	Orange	✓	✓	✓		✓
104	Green Corridor	Multiple	✓	✓			
105	Griffin Lakes	Broward	✓	✓	✓		✓
106	Hamilton Bluff	Polk	✓	✓	✓		
107	Hammock Lake Banyan Dr. Security	Miami-Dade	✓	✓			
108	Hammock Lakes Security Guard Station	Miami-Dade	✓	✓			
109	Hammock Oaks Golf and RV Resort	Sumter	✓	✓	✓		✓
110	Hammock Oaks Harbor Security Guard Station	Miami-Dade	✓	✓			
111	Hammock Reserve	Polk	✓	✓	✓		✓
112	Harbor Reserve	Osceola	✓	✓	✓		✓
113	Hartford Terrace	Polk	✓	✓	✓		✓
114	Hemingway Point	Broward	✓	✓	✓		✓
115	Heritage Park	St. Johns	✓	✓	✓		✓
116	Heron Isles	Nassau	✓	✓	✓		
117	Hickory Tree	Osceola	✓	✓	✓		
118	Hicks Ditch	Lake	✓	✓	✓		
119	Hidden Creek	Hillsborough	✓	✓	✓		✓
120	Highland Meadows	Polk	✓	✓	✓		✓
121	Highland Meadows West	Polk	✓	✓	✓		✓
122	Hilliard Isle	Osceola	✓	✓	✓		✓
123	Holly Hill Road East	Polk	✓	✓	✓		✓
124	Hollywood Beach 1	Broward	✓	✓	✓		
125	Horseshoe Creek	Polk	✓	✓	✓		
126	Hunt Club Grove	Polk	✓	✓	✓		✓
127	Indigo	Volusia	✓	✓	✓		
128	Indigo East	Marion	✓	✓	✓		
129	Islands of Doral III	Miami-Dade	✓	✓	✓		
130	Isle of Bartram Park	St. Johns	✓	✓	✓		
131	Jennings Farms HOA	Clay	✓				
132	Kepler Road	Volusia	✓	✓	✓		
133	Kingman Gate	Miami-Dade	✓	✓	✓		✓
134	Kings Bay Security Guard Station	Miami-Dade	✓	✓			
135	Knightsbridge	Osceola	✓	✓	✓		✓

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GMS Client #	GMS Client Name As of 2026-07-01	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
136	Lake Ashton	Polk	✓	✓	✓		
137	Lake Ashton II	Polk	✓	✓	✓		
138	Lake Deer	Polk	✓	✓	✓		✓
139	Lake Emma	Lake	✓	✓	✓		✓
140	Lake Harris	Lake	✓	✓	✓		✓
141	Lake Lizzie	Osceola	✓	✓	✓		✓
142	Lake Mattie Preserve	Polk	✓	✓	✓		
143	Lakehaven	Lake	✓	✓	✓		✓
144	Lakes by the Bay South	Miami-Dade	✓	✓	✓		✓
145	LakeShore Ranch	Pasco	✓	✓	✓		✓
146	Lakeside Plantation	Sarasota	✓	✓	✓		
147	Landings	Flagler	✓	✓	✓		
148	Landings At Miami	Miami-Dade	✓	✓	✓		
149	Lawson Dunes	Polk	✓	✓	✓		✓
150	Live Oak Lake	Osceola	✓	✓	✓		✓
151	Lucaya	Lee	✓	✓	✓		
152	Lucerne Park	Polk	✓	✓	✓		✓
153	Mainstreet at Coconut Creek	Broward	✓	✓	✓		
154	Majorca Isles	Miami-Dade	✓	✓	✓		
155	Mayfair	Brevard	✓	✓	✓		
156	McJunkin At Parkland	Broward	✓	✓	✓		
157	Meadowview At Twin Creeks	St. Johns	✓	✓	✓		
158	Mediterranea	Palm Beach	✓	✓	✓		
159	Metropica	Broward	✓	✓	✓		
160	Middle Village	Clay	✓	✓	✓		
161	Mirada (Lee)	Lee	✓	✓	✓		
162	Mirada (Pasco)	Pasco	✓	✓	✓		✓
163	Narcoossee	Orange	✓	✓	✓		✓
164	New River	Pasco	✓	✓	✓		
165	Newton Road	Miami-Dade	✓	✓	✓		
166	Nokomis Groves	Sarasota	✓	✓	✓		
167	North Boulevard	Polk	✓	✓	✓		✓
168	North Dade	Miami-Dade	✓	✓	✓		
169	North Powerline Road	Polk	✓	✓	✓		✓
170	North Springs	Broward		✓	✓	✓	
171	Northern Riverwalk	Palm Beach	✓	✓	✓		
172	Oakridge	Broward	✓	✓	✓		
173	Old Cutler Bay Security Guard Spe	Miami-Dade	✓	✓			
174	Old Hickory	Osceola	✓	✓	✓		✓
175	Orchid Grove	Broward	✓	✓	✓		✓
176	Osceola Chain of Lakes	Osceola	✓	✓	✓		✓
177	OTC	Duval	✓	✓	✓		
178	Palm Coast Park	Flagler	✓	✓	✓		
179	Palm Glades	Miami-Dade	✓	✓	✓		✓
180	Palms of Terra Ceia Bay	Manatee	✓	✓	✓		

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GMS Client #	GMS Client Name As of 2026-07-01	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
181	Panama City North	Bay	✓	✓	✓		✓
182	Park Creek	Hillsborough	✓	✓	✓		✓
183	Parkside Trails	Lake	✓	✓	✓		
184	Paulucci Acres	Orange	✓	✓	✓		
185	Peace Creek	Polk	✓	✓	✓		✓
186	Peace Creek Village	Polk	✓	✓	✓		✓
187	Pine Air Lakes	Collier	✓	✓	✓		✓
188	Pine Bay Estates Security Roving &	Miami-Dade	✓	✓			
189	Pine Isles	Miami-Dade	✓	✓	✓		
190	Pine Ridge Plantation	Clay	✓	✓	✓		
191	Poinciana	Polk	✓	✓	✓		✓
192	Poinciana West	Polk	✓	✓	✓		✓
193	Pollard Road	Polk	✓	✓	✓		
194	Portofino Isles	St. Lucie	✓	✓	✓		
195	Portofino Landings	St. Lucie	✓	✓	✓		✓
196	Portofino Shores	St. Lucie	✓	✓	✓		✓
197	Portofino Springs	Lee	✓	✓	✓		
198	Portofino Vineyards	Lee	✓	✓	✓		
199	Portofino Vista	Osceola	✓	✓	✓		
200	Post Oak Ranch	Pasco	✓	✓	✓		
201	Preston Cove	Osceola	✓	✓	✓		✓
202	Princeton Commons	Miami-Dade	✓	✓	✓		
203	Quail Roost	Miami-Dade	✓	✓	✓		✓
204	Radiance	Flagler	✓	✓	✓		
205	Ranches at Lake McLeod	Polk	✓	✓	✓		✓
206	Rancho Grande	Miami-Dade	✓	✓	✓		
207	Randal Park	Orange	✓	✓	✓		✓
208	Randal Park POA *	Orange	✓	✓			
209	Randal Park THOA *	Orange	✓	✓			
210	Randal Walk HOA-	Orange	✓	✓			
211	Remington	Osceola	✓	✓	✓		✓
212	Renaissance	Lee	✓				
213	Reserve	St. Lucie	✓	✓	✓	✓	
214	Residences at Tohoqua Community	Osceola	✓	✓			
215	Reunion East	Osceola	✓	✓	✓		✓
216	Reunion West	Osceola	✓	✓	✓		✓
217	Rhodine Road North	Hillsborough	✓	✓	✓		✓
218	Ridge at Apopka	Orange	✓	✓	✓		✓
219	Ridgecrest	Polk	✓	✓	✓		✓
220	Ridgewood Trails	Clay	✓	✓	✓		
221	River Place On The St. Lucie	St. Lucie	✓	✓	✓		✓
222	Riverbend	Hillsborough	✓	✓	✓		
223	Rivercrest	Hillsborough	✓	✓	✓		✓
224	Rivers Edge	St. Johns	✓	✓	✓		
225	Rivers Edge II	St. Johns	✓	✓	✓		

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GMS Client #	GMS Client Name As of 2026-07-01	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
226	Rivers Edge III	St. Johns	✓	✓	✓		
227	Riverwalk	Orange	✓	✓	✓		✓
228	Rolling Hills	Clay	✓	✓	✓		
229	Rolling Oaks	Osceola	✓	✓	✓		✓
230	Sabal Palm	Broward	✓	✓	✓		✓
231	Sampson Creek	St. Johns	✓	✓	✓		
232	San Simeon	Miami-Dade	✓	✓	✓		✓
233	Sand and Silica	Polk	✓	✓	✓		✓
234	Sandmine Road	Polk	✓	✓	✓		✓
235	Sawyer's Landing	Miami-Dade	✓	✓	✓		
236	Scenic Highway	Polk	✓	✓	✓		✓
237	Scenic Terrace North	Polk	✓	✓	✓		✓
238	Scenic Terrace South	Polk	✓	✓	✓		✓
239	Schaller Preserve	Polk	✓	✓	✓		
240	Seaton Creek Reserve	Duval	✓	✓	✓		✓
241	Sedona Point	Miami-Dade	✓	✓	✓		
242	Seminole Palms	Flagler	✓	✓	✓		
243	Seminole Palms of Flagler*	Flagler	✓	✓			
244	Shingle Creek	Osceola	✓	✓	✓		✓
245	Shingle Creek At Bronson	Osceola	✓	✓	✓		✓
246	Shotgun Road	Broward	✓	✓	✓		
247	Siena North	Miami-Dade	✓	✓	✓		
248	Silver Palms West	Miami-Dade	✓	✓	✓		
249	Six Mile Creek	Clay	✓	✓	✓		✓
250	Snapper Creek Lakes Security Gua	Miami-Dade	✓	✓			
251	Solterra	Miami-Dade	✓	✓	✓		
252	South Bay	Hillsborough	✓	✓	✓		
253	South Village	Clay	✓	✓	✓		
254	South Village New Smyrna Beach	Volusia	✓	✓	✓		✓
255	South-Dade Venture	Miami-Dade	✓	✓	✓		
256	St. Augustine Lakes	St. Johns	✓	✓	✓		
257	Stillwater	St. Johns	✓	✓	✓		
258	Stoneybrook South	Osceola	✓	✓	✓		✓
259	Stoneybrook South At CG	Osceola	✓	✓	✓		✓
260	Stoneybrook West	Orange	✓	✓	✓		✓
261	Storey Creek	Osceola	✓	✓	✓		✓
262	Storey Drive	Orange	✓	✓	✓		✓
263	Storey Park	Orange	✓	✓	✓		✓
264	Summit View	Pasco	✓	✓	✓		✓
265	Summit View II	Pasco	✓	✓	✓		
266	Sunrise Harbour Security Guard S	Miami-Dade	✓	✓			
267	Talis Park	Collier	✓	✓	✓		✓
268	Tapestry	Osceola	✓	✓	✓		✓
269	Terra Bella	Pasco	✓	✓	✓		✓
270	Tesoro	St. Lucie	✓	✓	✓		✓

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GMS Client #	GMS Client Name As of 2026-07-01	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
271	The Crossings At Fleming Island	Clay	✓	✓	✓	✓	
272	The Gardner Trails	Polk	✓	✓	✓		✓
273	TIFA	Brevard	✓	✓	✓		
274	Tison's Landing	Duval	✓	✓	✓		
275	Tohoqua	Osceola	✓	✓	✓		✓
276	Tohoqua Crossings Townhomes H	Osceola	✓	✓			
277	Tohoqua Master Association *	Osceola	✓	✓			
278	Tohoqua Reserve *	Osceola	✓	✓			
279	Tolomato	St. Johns	✓	✓	✓		
280	Towne Park	Polk	✓	✓	✓		✓
281	Townhomes at Tohoqua *	Osceola	✓	✓			
282	Tranquility	Brevard	✓	✓	✓		
283	Turnbull Creek	St. Johns	✓	✓	✓		
284	Turtle Run	Broward	✓	✓	✓		✓
285	Valencia Water Control District	Orange	✓	✓	✓		
286	Venice Grand Oaks	Sarasota	✓	✓	✓		
287	Ventana	Hillsborough	✓	✓	✓		✓
288	Veranda Landing	St. Lucie	✓	✓	✓		
289	Verano #1	St. Lucie	✓	✓	✓		
290	Verano #2	St. Lucie	✓	✓	✓		✓
291	Verano #3	St. Lucie	✓	✓	✓		✓
292	Verano #4	St. Lucie	✓	✓	✓		
293	Verano #5	St. Lucie	✓	✓	✓		
294	Verano Center	St. Lucie	✓	✓	✓		
295	Viera East	Brevard	✓	✓	✓		
296	Villa Portofino East	Miami-Dade	✓	✓	✓		
297	Villa Portofino West	Miami-Dade	✓	✓	✓		
298	Villages of Biscayne Park**	Miami-Dade	✓	✓			
299	Villages of Bloomingdale	Hillsborough	✓	✓	✓		✓
300	Villamar	Polk	✓	✓	✓		✓
301	Water Tank Road	Polk	✓	✓	✓		
302	Water's Edge	Manatee	✓	✓	✓		✓
303	Waterford Estates	Charlotte	✓	✓	✓		
304	Waterleaf	Hillsborough	✓	✓	✓		
305	Waterlin Master POA	Osceola	✓	✓			
306	Waterlin Stewardship District	Osceola	✓	✓	✓		✓
307	Waterstone	St. Lucie	✓	✓	✓		✓
308	Weiberg Road	Polk	✓	✓	✓		
309	Wellness Ridge	Lake	✓	✓	✓		✓
310	Westside	Osceola	✓	✓	✓		✓
311	Westside Haines City	Polk	✓	✓	✓		
312	Westview North	Miami-Dade	✓	✓	✓		✓
313	Westwood OCC	Orange	✓	✓	✓		
314	White Clay	Polk	✓	✓	✓		
315	Wilford Preserve	Clay	✓	✓	✓		✓

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GMS Client #	GMS Client Name As of 2026-07-01	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
316	Willow Creek	Brevard	✓	✓	✓		✓
317	Willow Creek II	Brevard	✓	✓	✓		
318	Willowbrook	Polk	✓	✓	✓		
319	Wind Meadows South	Polk	✓	✓	✓		✓
320	Windsor at Westside	Osceola	✓	✓	✓		✓
321	Windsor Cay	Lake	✓	✓	✓		✓
322	Windward	Osceola	✓	✓	✓		✓
323	Woodland Crossing	Sumter	✓	✓	✓		
324	Woodland Ranch Estates	Polk	✓	✓	✓		
325	Woodlands Section 9	Broward	✓	✓	✓		
326	Wynnfield Lakes	Duval	✓	✓	✓		
327	Wynnmere West	Hillsborough	✓	✓	✓		✓
328	Yarborough Lane	Polk	✓	✓	✓		
329	Zephyr Ridge	Pasco	✓	✓	✓		✓
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CLIENT LISTING

RISK MANAGEMENT REQUIREMENTS

ACORD		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY)
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 be endorsed. If SUBROGATION is WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).				
PRODUCER Zelen Risk Solutions, Inc. 7964 Devos Street Jacksonville FL 32220		CONTACT NAME: Holly Howe PHONE: (904) 262-8080 FAX: (904) 262-1444 E-MAIL: holly@zelenrisk.com		
INSURED Governmental Management Services-Tampa, LLC 1001 Bradford Way Kingsport TN 37763		INSURER(S) AFFORDING COVERAGE INSURER A: Northfield Insurance Company INSURER B: Hiscox Insurance Company INSURER C: ReliaFirst Insurance Company INSURER D: 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.				
INSURANCE TYPE	POLICY NUMBER	POLICY EFF. DATE	POLICY EXP. DATE	LIMITS
A COMMERCIAL GENERAL LIABILITY CLAIMS-MADE ☒ OCCUR ☐ GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PER ☐ AGG ☐ LOC	WS700756	02/27/2026	02/27/2027	EACH OCCURRENCE: \$1,000,000 DAMAGE TO RENTED PREMISES (EA OCCURRENCE): \$100,000 MED EXP (Any one person): \$5,000 PERSONAL & ADV INJURY: \$1,000,000 GENERAL AGGREGATE: \$2,000,000 PRODUCTS - COMPOD AGG: \$2,000,000
AUTOMOBILE LIABILITY ANY AUTO ☐ ALL OWNED AUTOS ☐ ALL NON-OWNED AUTOS ☐ ALL AUTOES ☐ UNBELLIA LIAB ☐ EXCESS LIAB ☐				COMBINED SINGLE LIMIT \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ EACH OCCURRENCE \$ AGGREGATE \$
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY EMPLOYER/EMPLOYEE/EXECUTIVE OFFICER/OWNER EXCLUDED? (Waiver in W-9) FIVE (5) YEAR TERM	0520-59463	09/01/2025	09/01/2026	ALL EMPLOYMENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
B Professional	MPL4245121.25	09/05/2025	09/05/2026	Each Claim \$1,000,000 Aggregate \$2,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Certificate holder, its officers, supervisors, agents, managers, engineers and staff are additional insureds with respect to the general liability when required by written contract. Coverage is primary and non-contributory. Waiver of subrogation applies in favor of the additional insureds when required by written contract.				
CERTIFICATE HOLDER The Hammocks Community Development District 4530 Eagle Falls Place Tampa, FL 33619		CANCELLATION 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>Vicky M. Zelen</i>		
ACORD 25 (2014/01) The ACORD name and logo are registered marks of ACORD. © 1988-2014 ACORD CORPORATION. All rights reserved.				

ACORD		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY)
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.				
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION is WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).				
PRODUCER State Farm 330 Alton Suite 324 Ponte Vedra, FL 32082		CONTACT NAME: Stephanie Marciani PHONE: 904-425-4054 FAX: 904-425-4049 E-MAIL: Stephanie@EdeWilliams.com		
INSURED Governmental Management Services Tampa, LLC 1001 Bradford Way Kingsport, TN 37763		INSURER(S) AFFORDING COVERAGE INSURER A: State Farm Mutual Automobile Insurance Company INSURER B: INSURER C: INSURER D: 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.				
INSURANCE TYPE	POLICY NUMBER	POLICY EFF. DATE	POLICY EXP. DATE	LIMITS
A COMMERCIAL GENERAL LIABILITY CLAIMS-MADE ☐ OCCUR ☐ GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PER ☐ AGG ☐ LOC				EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (EA OCCURRENCE) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPOD AGG \$
AUTOMOBILE LIABILITY ANY AUTO ☐ ALL OWNED AUTOS ☐ ALL NON-OWNED AUTOS ☐ ALL AUTOES ☐ UNBELLIA LIAB ☐ EXCESS LIAB ☐	X X 0525445-SFP-59	04/11/2026	10/11/2026	COMBINED SINGLE LIMIT \$ BODILY INJURY (Per person) \$1,000,000 BODILY INJURY (Per accident) \$1,000,000 PROPERTY DAMAGE (Per accident) \$1,000,000 EACH OCCURRENCE \$ AGGREGATE \$
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY EMPLOYER/EMPLOYEE/EXECUTIVE OFFICER/OWNER EXCLUDED? (Waiver in W-9) FIVE (5) YEAR TERM				ALL EMPLOYMENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) The Hammocks Community Development District, its officers, supervisors, agents, managers, counsel, engineers, staff, and representatives is additional insured with regard to Auto Liability. The insurance is Primary and Non-Contributory with respect to claims arising out of the operation of the described vehicle. Waiver of Subrogation under the Liability Coverage and Property Damage Coverage. If Liability Coverage or Property Damage Liability Coverage is charged or terminated as to the interest of the Additional Insured, we will provide the Additional Insured 30 days notice of such change or termination unless another number of days notice is shown on the Declarations Page.				
CERTIFICATE HOLDER The Hammocks Community Development District 4530 Eagle Falls Place Tampa, FL 33619		CANCELLATION 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>Stephanie Marciani</i>		
ACORD 25 (2016/03) The ACORD name and logo are registered marks of ACORD. © 1988-2015 ACORD CORPORATION. All rights reserved.				

Any additional insurance requirements will be treated as reimbursable expenses and invoiced to the District on an annual basis.

COST OF SERVICES

MANAGEMENT SERVICES

Management services will be provided for a fixed annual fee.

See Exhibits "A" and "B"

Reimbursable expenses such as copies, postage, courier services, printing, and binding will be billed on a monthly basis. Management fees are invoiced at the beginning of each month and due within 30 days of the invoice date. Subsequent management fees will be established based upon the adoption of the annual operating budget, which will be adjusted to reflect ongoing levels of service.



**EXHIBIT "A" – DISTRICT MANAGEMENT FEE SCHEDULE**

GMS Services Descriptions	FY '27 Adopted Budget	FY '27 GMS Fees	GMS Annual Savings
Management, Administrative, Financial and Revenue Collection, and Accounting Services: - Annual Fee paid in equal monthly payments (plus, reimbursable expenses) - Our Agreement contemplates up to 12 meetings per year up to 3 hours in duration	\$47,000	\$42,500	\$4,500 9.57%
Annual Assessment Administration: (Beginning with the first assessment to individual unit owners, direct assessment, or utilizing tax collector)	\$0	\$2,000	\$-2,000
Dissemination Agent Services: \$2,500 Annual Fee for 1st Bond Issuance (\$2,500 for each additional series of Bonds)	\$0	\$2,500	\$-2,500
Information Technology Fees & Annual Website Maintenance: Annual Fee paid in equal monthly payments (Does not include the cost of the creation of an ADA-compliant website, if applicable. No overage fees due to the number of pages stored by GMS.)	\$1,600	\$1,600	\$0
Management Fee Holiday: - October 2027 Services will be performed with no monthly Management Fee. (\$47,000 / 12 = \$3,917)	\$0	\$-3,917	\$-3,917
The GMS Proposal Compared To The Proposed Fiscal Year '27 Budget For The The Hammocks Community Development District	\$48,600	\$44,683	\$-3,917 8.06% Savings

EXHIBIT "B" – MISCELLANEOUS FEES SCHEDULE

Item	Cost
Agenda Package Hardcopy (if Applicable)	\$2.50 per regular Agenda Mtg.
Copy	\$0.15 / black and white page
Binders, Envelopes, Storage Boxes, and other Office Supplies	Actual Cost
USPS / FedEx / UPS / Conference Calls	Actual Cost
Offsite Physical Records Storage and Archival	\$50.00/Month
Extended or Extra Board Meetings Any extra meeting(s) or meeting duration exceeding a three-hour duration may be charged a meeting overage fee rounded up to the nearest full hour.	\$2,000/Meeting \$ 250/Hour
Additional Services Available:	Cost
Other Services ** - New Bond Issuance Cost (per bond issue) - Refinance Bond Issuance Cost (per bond issue) - Debt Service Assessment Methodology Preparation - SERC Preparation & Assistance with Petition - Prepaid Estoppel Letter - One Lot - Prepaid Estoppel Letter - Multiple Lots - Prepaid Estoppel Letter - Partial Payoffs - Annual Construction Accounting Fee (while active) - Request For Proposal Scope Preparation Documents (per RFP request - Landscaping, Irrigation, Aquatic, etc.)	\$ 25,000 \$ 15,000 \$ 20,000 \$ 5,000 \$ 100 \$ 250 \$ 500 \$ 5,000 \$ 3,500
Other Requested Administrative Services As Requested By Bondholders, Dissemination Agent, District Counsel, or Boards of Supervisors - District Manager - District Accountant - District Administration - Field Operations Manager	\$ 175/Hour \$ 125/Hour \$ 80/Hour \$ 85/Hour
Field Management Services - Annual Fee paid in equal monthly payments (plus, reimbursable expenses) - Monthly On-Site Inspections Vendor Coordination - Two (2) Visits per Month on Average	Available Service \$ TBD
Facility Maintenance and Repair Services. GMS has a comprehensive on-site and insured maintenance service for small to medium size projects which can be provided at the direction of the District Board Of Supervisors and/or the District Manager	\$55.00/Hour + Expenses

Miscellaneous fees are reviewed annually by GMS. An itemization of all miscellaneous fees and units consumed is included in the monthly invoice and presented to the Board of Supervisors for approval as part of the agenda packages. GMS strives to work with the District to minimize reimbursable expenses by utilizing electronic agendas and similar approaches. Any additional insurance requirements will be treated as reimbursable expenses and invoiced to the District annually.

TO THE BOARD OF SUPERVISORS OF THE

The Hammocks CDD



THANK



YOU

SERVING
FLORIDA'S
COMMUNITIES



GMS
GOVERNMENTAL MANAGEMENT SERVICES



Address:
4530 Eagle Falls Place
Tampa, FL 33619



Direct Phone Line:
(865) 603-5101



Darrin Mossing, GMS President:
DMOSSING@GMSTNN.COM



say hi to
happy living

**Introducing, The Hammocks CDD, to a new
approach to community management—
reinvented, reimaged,
uniquely designed for you.**





Dear The Hammocks CDD,

Kai is pleased to submit our proposal to provide District Management Services for the The Hammocks Community Development District.

Our team manages multiple CDDs in the surrounding area, giving us strong familiarity with local operations and the ability to provide consistent oversight and quick response when needed. This regional experience also allows us to apply proven best practices and maintain a high standard of service.

Our team understands the day-to-day responsibilities, regulatory requirements, and financial needs of a well-run District. We bring experience not only in administrative and financial management, but also in field service operations, including vendor coordination, facility oversight, and on-site issue resolution. This combination ensures smooth operations and a reliable point of contact for the Board.

Kai is a service-focused firm committed to clear communication, responsiveness, and practical solutions. Every District is unique, so we tailor our approach to the goals and expectations of your Board—keeping processes simple, transparent, and easy to follow. Our strengths include budgeting, assessments, audits, reporting, and long-term financial planning. Through streamlined systems and real-time financial visibility, we help the Board make informed decisions with confidence. We emphasize accuracy, accountability, and efficiency in everything we deliver.

Transitions can be challenging, but they also create opportunities to clarify priorities, improve processes, and strengthen overall operations. We are prepared to support that transition smoothly and professionally.

We are pleased to propose Andy Mendenhall as your District Manager. Andy brings strong technical knowledge, excellent organizational skills, and extensive experience with CDD operations. His hands-on, collaborative approach ensures reliable support for the Board.

At Kai, our mission is simple: happiness—rooted in kindness, action, and innovation. We welcome the opportunity to support The Hammocks CDD with dedicated service, local expertise, and dependable management.

Thank you for your consideration. We look forward to discussing how we can support the District with care and professionalism.

Sincerely,

Lauren Parsons
Vice President





Say Hi to Happy Living

COMMUNITY MANAGEMENT DONE RIGHT.



We launched Kai in 2020 to address a straightforward issue: residents struggled to get clear, timely responses. With responsibilities split among HOAs, CDDs, builders, and developers, accountability was scattered. Kai brought operations and resident support under one roof—initially serving developer-owned properties—and leveraged technology to make communication seamless and dependable.

As we expanded, we moved beyond developer-controlled properties and doubled our portfolio by partnering with additional developments and resident-managed communities. Our approach remained the same: real answers from real people, powered by innovation and technology, and supported by our Happiness Guarantee.

**Kai leads with
Kindness. Action. Innovation.**

 **Kai's Mission:**
Maximize Happiness. 

24-Hour Response Guarantee(d)

We guarantee a response within 24 hours.

**All Kai services are customized to
meet your needs.**

Homeowners Associations

Full-service HOA management, including handling compliance, finances, maintenance, and more

Special Districts

Specialization in district management that oversees operations, financing compliance, and community growth

Lifestyle & Events

Customizable lifestyle services with wellness programs, social events, and family-focused experiences

Field Services

Vendor monitoring, contract negotiations, maintenance assistance, and measuring service quality

Accounting

CPA-backed accuracy, transparent reporting, and timely financial insights you can trust

Commercial Association Management

CPA-backed accuracy, transparent reporting, and timely financial insights you can trust

THE KAI PORTFOLIO.



Districts:
37

2025 Events
Planned:
122

Counties:
14 across
Florida

Associations:
45

2025
Newsletters:
1,227

Households:
42k+

"When I need items addressed they respond, I also commend on proactively patrolling and not waiting for an issue but advise on potential issues. In my world that meets my expectations and I would recommend using Kai management Services."

* District Chairman

"Cannot say enough about the employees and management of Kai. Kai treats our community like top priority."

* Happy Resident



Proposed District Manager



Andy Mendenhall



Andy Mendenhall serves as Vice President of District Management at Kai, where he leads the company's district management department and oversees operations for multiple Community Development Districts. With more than 20 years of experience, he is recognized for his expertise in CDD governance, financial strategy, and compliance. Holding both an MBA and Project Management Professional (PMP®) certification, Andy brings proven leadership in guiding Boards, managing municipal bonds and budgets, and driving efficient, accountable operations.

Andy's connection to The Hammocks runs deeper than most – he personally managed the District for over 10 years, giving him an intimate, firsthand understanding of its infrastructure, financial history, and the unique priorities of its residents that few management companies could replicate. Andy lives just 4 miles from the District, and the Board isn't just hiring a manager – they're gaining a neighbor who is personally invested in managing the Hammocks.

- **Names and number of CDDs represented by the proposed District Manager:**
 - 6 Districts - Anthem Park CDD, Cresswind DeLand CDD, Live Oak 1 CDD, North Loop CDD, Woodland Preserve CDD, Watergrass II CDD
- **Length of Years Serving as a District Manager:**
 - 20 Years
- **After Hours Emergencies:**
 - Contact Kai's 24/7 emergency line: 813-565-4663
- **Backup Plan When Andy is Not Available:**
 - With Andy's small portfolio, it is easy for him to manage his schedule and ensure he attends all meetings. In the event that Andy is not available, we have several other District Managers on the team to ensure that coverage is always provided for The Hammocks CDD.
- **Escalation Procedures:**
 - Andy Mendenhall, VP of District Management - Andy@HiKai.com - 813-404-3507
 - Lauren Parsons, VP - Lauren@HiKai.com - 813-351-9491

Contact Andy:

- Andy@HiKai.com - 813-404-3507

Meet the **kai** Collective



Lauren Parsons, Vice President

Lauren brings over a decade of experience in community management, specializing in CDDs, HOAs, and developer partnerships. She guides Boards and developers through every stage of community creation and long-term operations with strategic insight and transparent communication.

Known for building lasting client relationships, Lauren delivers dependable guidance and results that strengthen trust, collaboration, and long-term community success. Her ability to balance priorities while maintaining operational excellence makes her a dependable leader and a trusted partner in shaping communities that stand the test of time.



Ken Joines, Controller

Ken came to Kai with over a decade and a half of Community Association and CDD experience with team management, accounting management, portfolio management, on-site management, administrative experience, financial analysis experience, and accounting experience. Previously, Ken had nearly two decades of experience in retail, financial planning, business consulting, and commercial real estate. Ken received his MBA with concentrations in Finance and Commercial Real Estate from the University of Florida – Hough Graduate School of Business. As the son of two teachers, Ken enjoys helping clients and team members grow, learn, and improve. When not working, he enjoys spending time with family, at the beach, or in the mountains.



Brian Quillen, VP of Operations

Brian brings over 20 years of diverse experience in community and regional management, with a proven track record of operational oversight, team leadership, and resident engagement. Prior to joining Kai, he served as a Regional Director, where he was responsible for the successful management of multiple large-scale associations.

Brian's foundational experience in hospitality management has shaped his service-oriented leadership style, grounded in responsiveness, accountability, and continuous improvement. He remains committed to delivering high-performance results for communities and developers alike.

Meet the **kai** Collective



Heather Dilley, District Manager

Heather is a seasoned Community Development District Manager with over 15 years of experience supporting and enhancing Florida communities. She is known for her strong financial oversight, budgeting expertise, strategic planning, and highly organized management style. With a B.S. in International Business and a PMP® certification, Heather brings a thoughtful, detail-oriented approach to every district she serves.

Her clear communication and ability to translate complex matters into actionable information help Boards make confident, informed decisions. Heather is also flexible and responsive to each Board's preferences, adapting reports, presentations, and processes to fit their unique needs. Her professionalism and dedication have made her a trusted partner in managing notable communities, including K Bar Ranch and Union Park. She is supported by Kai's VP of District Management.



David Wenck, Senior District Manager

David is a Certified District Manager with over 13 years of experience in Community Development District leadership and field services. With six years of board experience, including four as Chair, David brings a unique understanding of the perspectives and priorities of elected boards.

He is recognized for creating strong, trusted relationships with board members, and residents—with open lines of communication that drive collaboration and effective decision-making.

Specializing in multi-district portfolio management, Florida Statutes (Chapter 190, Sunshine Law), budget development, and financial turnaround, David consistently promotes transparency, accountability, and community trust in every district he serves.



Maria Elia, VP of Communications

Maria is a seasoned communications professional with a bachelor's degree in Communication from The University of Tampa and over ten years of experience in communications, marketing, and public relations. At Kai, she leads the company's end-to-end communications strategy, from resident-facing newsletters, announcements, and flyers to community portals and digital updates.

Maria oversees brand voice, messaging consistency, and visual identity, ensuring every interaction reflects the warmth and responsiveness that Kai is built on. As the escalation lead for sensitive communications, she brings a calm, thoughtful approach that builds trust when it matters most, partnering closely with leadership and external stakeholders to keep messaging purposeful, residents informed, and communities genuinely happy.

Meet the **kai** Collective



Elizabeth Moore, Budget and Assessment Manager

With 17 years of experience in Community Development District (CDD) management, Elizabeth specializes in building multi-fund budgets and complex special assessment methodologies tailored to each client's unique development program. She combines deep expertise in financial modeling with advanced allocation techniques using ERUs, trip generation, impervious surface ratios, and benefit-based factors. Elizabeth has led the structuring of multimillion-dollar bond programs and true-up strategies, aligning long-term funding with the operational and capital needs of growing communities. Known for her precision, strategic foresight, and collaborative approach, she delivers high-impact solutions that drive financial resilience and stakeholder confidence.



Dennese Martinez, Director of Accounting

Dennese Martinez has 25 years of accounting experience with Corporations, Nonprofits and Government Accounting. She has worked with auditors and CPA's on extensive audits delivering great success. Holds a Masters in Accounting and Financial Management from DeVry University. Also, 15 + years' experience in Property Management and working with HOA's. She has led many teams in developing strategic plans and policy and procedures for accounting teams. By adapting to each Board's unique preferences, she ensures her approach aligns seamlessly with their goals.

Kai combines innovative technology with decades of financial insight to empower districts with a frictionless, transparent, and accountable financial management experience. Backed by a strong, collaborative team that communicates effectively and supports one another, Kai is structured to provide seamless continuity at every level. Should additional support or backup ever be needed, the right resources and leadership are already in place to ensure The Hammocks CDD never experiences a gap in service, responsiveness, or financial oversight.

Standard District Operations

MEETING SUPPORT

Kai manages the complete lifecycle of District meetings in compliance with Chapters 189 and 190, Florida Statutes, including:

- Organizing, attending, and conducting all Board meetings, workshops, and hearings
- Preparing minutes, agendas, and supporting materials
- Publishing and posting statutory notices
- Coordinating meeting logistics, including onsite, telephonic, or virtual participation
- Maintaining meeting schedules and submitting required notices to local agencies

DISTRICT OPERATIONS & ADMINISTRATION

Kai serves as the District's primary administrative partner, providing:

- Central point of contact for District inquiries
- Maintenance of meeting action item lists and follow-up tracking
- Coordination of ADA compliance and website content management
- Policy implementation and operational guidance to the Board
- Full procurement support including competitive bidding, RFP/RFQ development, and vendor selection
- Comprehensive contract administration, including evaluating current contracts
- Regular onsite inspections of District property and infrastructure
- Insurance procurement, certificate monitoring, and claims coordination
- Development and implementation of risk management practices
- Authorized negotiation with agencies, vendors, and residents when directed

STATUTORY COMPLIANCE & REPORTING

Kai ensures adherence to all statutory requirements through:

- Annual Registered Agent filings with DEO and County
- Submission of annual Board meeting schedules
- Filing of public depositor reports
- Submission of audits and required financial reports to state and local agencies
- Annual voter registration request and reporting to Supervisor of Elections
- Serving as liaison to the State Commission on Ethics for financial disclosure
- Fulfillment of Chapter 119 public records obligations, including timely responses, record preservation, and confidentiality protections

RECORDS MANAGEMENT

Kai serves as the official custodian of District records by:

- Maintaining the Record of Proceedings within the appropriate jurisdiction
- Serving as Records Management Liaison Officer to the Department of Library and Archives
- Ensuring all records, including Board emails, meet retention and destruction requirements
- Responding to public records requests promptly and professionally
- Maintaining ADA-compliant public records access



Financial Management

BOARD PAYROLL SYSTEM – ENGAGE PEO

Engage PEO delivers a reliable, compliant payroll solution tailored to Supervisor compensation. Payroll is processed twice monthly to align with meeting schedules, ensuring accurate, on-time payments. As an IRS-Certified and ESAC-accredited provider, Engage handles all tax filings and reporting within a secure, cloud-based system that gives Supervisors and administrators transparent, self-service access.

FINANCIALS, REPORTING & AUDIT SUPPORT

Kai delivers full GAAP/GASB-compliant financial management overseen by degreed accounting professionals.

Financial systems & reporting include:

- Implementing an integrated financial reporting system tailored to government/fund accounting.
- Managing general, capital, reserve, and bond fund activity.
- Preparing monthly financial statements, including budget-to-actual summaries.
- Delivering required state, county, and trust-related financial reports.
- Coordinating directly with independent auditors and ensuring timely completion of the Annual Audit.
- With reliable preparation and organized documentation, we help ensure a smooth audit cycle each year.

ACCOUNTS PAYABLE & VENDOR PAYMENT PROCESSING

Kai provides a secure, transparent, and timely AP workflow.

Services include:

- Full invoice intake, coding, and documentation management.
- Automated approval routing using AvidXchange.
- Easy invoice submission & payment scheduling that ensures timely vendor compensation.
- Construction requisition processing and purchase order oversight.
- Maintaining auditable AP records with strong internal controls, overseen by Kai's Licensed CPA.
- Ensuring reliable vendor relationships to support uninterrupted District operations.

TREASURY SERVICES

Kai protects District funds and maximizes liquidity through disciplined treasury management.

Services include:

- Cash flow oversight and bank account administration.
- Investment of surplus funds under Florida law via SBA-approved programs.
- Securing favorable banking terms through economies of scale.
- Maintaining strong internal controls and accurate cash reporting.
- Kai has strong banking relationships with numerous banks across the State of Florida, ensuring the District has appropriate safeguards in place and District funds are protected.



Bond & Assessment Services

FINANCIAL & ASSESSMENT SERVICES

- Assessment Roll Preparation: Ownership verification, parcel allocation, and county-ready roll development.
- Tax Roll Administration: Placement of assessments on the county roll, reconciliation with collections, and allocation between Debt Service and O&M.
- TRIM Compliance: Preparation of DR-421 certifications and adherence to county requirements.
- Reporting & Compliance: Completion of all required state reports, maintenance of auditable financial records, and timely estoppel responses.

KAI FINANCIAL & BOND MANAGEMENT

Kai supports the full lifecycle of District financing with services that include:

- Preparation of estoppel letters
- Bond issuance and refinancing coordination
- Debt service billing, collection, and payment management
- Trustee liaison and compliance oversight
- Clear, reliable financial reporting to support fiscal stewardship

BOND ADMINISTRATION

Kai structures and coordinates bond issuances and refinancing, including methodology reports and identification of cost-saving opportunities. Our team oversees debt service collections, ensures timely principal and interest payments, and manages trustee communications and invoice processing. Over the past five years, we have supported more than \$445 million in total bond issuances.

CAPITAL PROGRAM ADMINISTRATION

Kai partners with District Staff and Engineers to evaluate capital projects, analyze timing and lifecycle costs, and align improvements with reserve needs and long-term planning. We also work with underwriters, lenders, and financial advisors to structure effective funding solutions. With proven procedures and reliable coordination, we guide Districts through complex financing and capital implementation processes.

BUDGETING

Our budgeting process begins with a Board vision session to establish priorities for the upcoming year. Kai's District Managers and accounting team then prepare draft budgets and lead a focused workshop to review revenue projections, operational needs, and strategic options.

We coordinate closely with District Staff, Engineers, and Attorneys to ensure all operational, maintenance, and compliance items are captured accurately. Public notices and statutory deadlines are managed seamlessly. The result is a transparent, collaborative budgeting process aligned with both immediate needs and long-term goals.



Field Service & Amenity Management

While field operations are not part of the District's requested scope, Kai offers proven expertise in maintenance oversight, asset care, and vendor management. These services remain available anytime the District requires additional support.

PROACTIVE MAINTENANCE & ASSET CARE

Kai focuses on prevention-first practices that extend the life of District assets and reduce long-term costs. Our team performs routine site observations, identifies early maintenance needs, and provides strategic recommendations designed to avoid disruptions and minimize capital reinvestments.

Grounds, Amenities & Infrastructure Oversight

We ensure the community's appearance, safety, and functionality remain top-tier by monitoring:

- Landscaping, turf, and horticulture conditions
- Pools, ponds, water features, and irrigation systems
- Gates, fencing, signage, lighting, and hardscape elements
- Roadways, sidewalks, stormwater, and drainage infrastructure

Our approach balances curb appeal with structural integrity to ensure District assets remain well-kept and dependable.

VENDOR OVERSIGHT & QUALITY ASSURANCE

Kai actively manages vendor performance—not just coordination. Our services include:

- Vendor onboarding and contract compliance checks
- Routine inspections to validate scope and service quality
- Recommendations to the Board supported by transparent reporting
- Verification of work before payment release

This ensures the District receives consistent value and accountability from every service provider.

AMENITY STAFF MANAGEMENT & HR OVERSIGHT

- Kai has experience recruiting, training and onboarding amenity staff
- Create and manage schedules for adequate coverage
- Oversee daily operations of staff, utilizing Kai's timekeeping app to track and monitor performance
- Coordinate payroll and benefits for staff

COMMUNICATION & RESPONSIVENESS

With regular updates, transparent reporting, and responsive follow-through, Kai ensures Boards always have a clear understanding of asset conditions and vendor activity—empowering informed decisions and proactive management.



Transparent AP Workflows



Here is how every invoice moves through Kai. From receipt to payment to built-in separation of duties, automated safeguards, and full Board visibility at every step.



Invoice Entry Point

All vendor invoices enter through a single controlled channel – the dedicated email lockbox Invoices@HiKai.com – which feeds directly into the AP system. Every invoice is timestamped and tracked from the moment it enters the system.

1

AP Assignment Team

The AP team receives the invoice in Vantaca, assigns it to the correct community and vendor, and routes it to the community manager. AP does not code or approve, their role is intake and routing only.

2

Manager Review & GL Coding

The manager validates the invoice against the vendor contract, confirms the work was performed and the amount is correct, and codes it to the proper general ledger account. Once satisfied, the manager routes it to the Board for approval.

3

Board Approval (If Required)

The invoice enters the Board's approval queue in Vantaca with full visibility into the vendor, amount, GL coding, and any supporting documentation. Nothing moves to payment without Board approval.

4

Accountant Review & Payment

Only after approval does the accountant review the invoice one final time and process payment. This is the only person who can execute a payment, and they cannot do so without the preceding steps completed in the system.



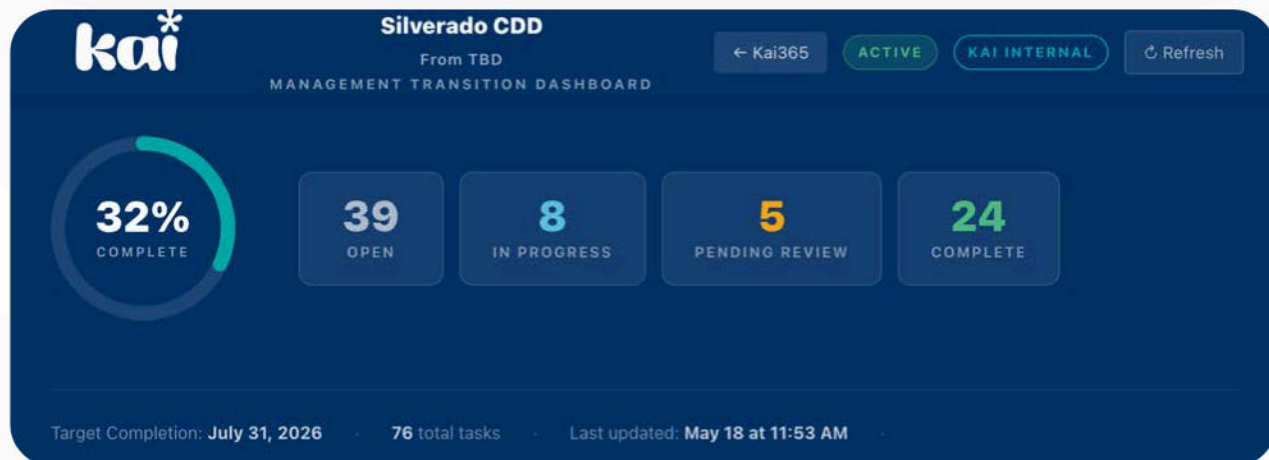
Every handoff is logged with a timestamp, user ID, and action taken – creating a permanent, auditable record accessible to every Board member through the Vantaca portal at any time.

A Smooth Transition to Kai



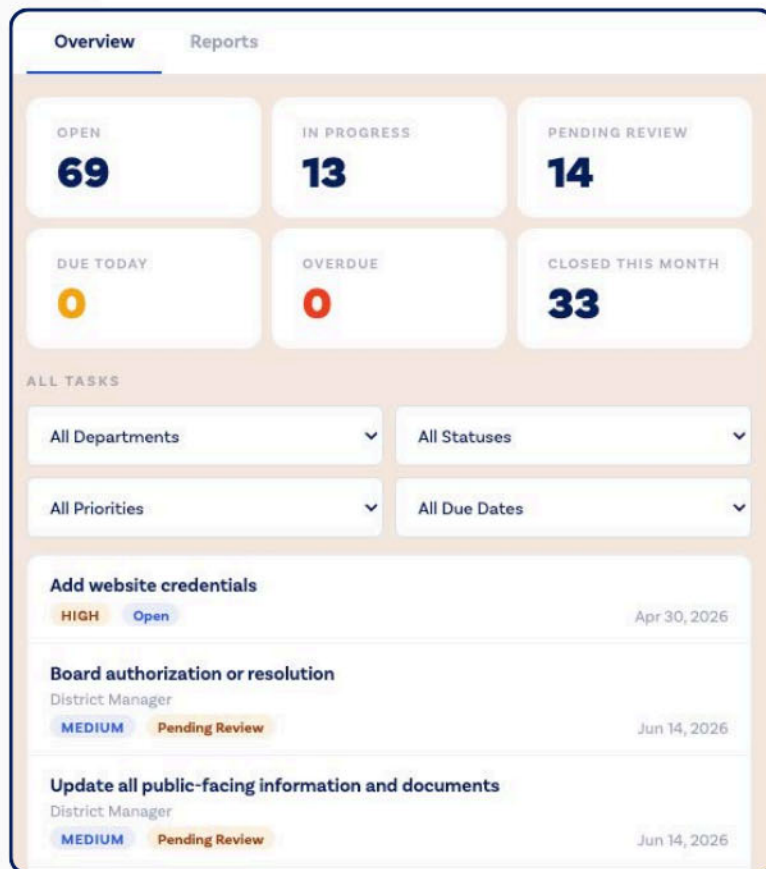
Switching management companies shouldn't feel like a leap of faith. With Kai, your Board has full visibility into every step of the onboarding process from day one.

Our interactive Transition Dashboard gives The Hammocks CDD a live, real-time view of your entire management transition — a list of structured tasks across six departments, tracked from kickoff to completion.



What your Board sees:

- * **A live progress dashboard** — see exactly how many tasks are open, in progress, pending review, and complete at any moment. No need to ask. No need to wait for a meeting.
- * **Department level tracking** — tasks are organized by team, so the Board knows whether legal, finance, field services, or administration is driving each item forward.
- * **Weekly email updates** — every week, Kai sends an automated progress report directly to Board members showing what moved, what's complete, and where we need input or decisions from the Board. No surprises.
- * **Full transparency on blockers** — if something is stuck, we show you.
- * **A view only Board portal** — Board members access the live dashboard with a simple shared password, from any device, at any time.



Proposed District Management Services

Services	Current Management Fees	Proposed Kai Management Fee (Annual)	Proposed Kai Management Fee (Monthly)
District Management	\$47,000	\$45,000	\$3,750
Annual Savings	\$2,000		
Total Management Fees	\$45,000		

Fee Schedule Pricing Notes

1. Bond Financing and Refinancing Services

Fees for bond financing and refinancing services will be negotiated at the time such services are defined and requested. These fees are typically billed on a lump-sum basis and deferred until no later than the closing or refunding of the bonds, at which time all unpaid fees and expenses will be due and payable. Fees and expenses for these services are fully reimbursable and payable solely from bond proceeds.

2. Assessment Roll Services

Assessment roll services, including the preparation and certification of the assessment roll to the property appraiser and tax collector, and/or the direct collection of special assessments from landowners, if applicable, are included in the standard monthly management fee.

3. Meeting Attendance

Management services include up to thirteen (13) meetings per year. Meetings exceeding two (2) hours will be billed at an hourly rate of \$275.00.

4. Field Services

Field services may be provided to the community for an additional fee.



why kai?



KAI'S FIVE CORE DIFFERENTIATORS:

- Personalized, high-touch service. Your District Manager knows your community, knows your Board members, and treats your concerns as priorities, not just tickets in a queue.
- Tech-enabled operations and reporting. Modern management platforms give your Board real-time access to financial data, inspection reports, and action item tracking.
- Experienced CDD leadership. Deep, specialized expertise across Florida CDD management including operations, finance, bond compliance, field services, and statutory compliance.
- Local, accessible management. Kai is based in Tampa. Your District Manager will be nearby, attend your meetings in person, and respond directly, not route you through a call center.
- Long-term partnership mindset. We don't manage districts to fill a contract. We build relationships. Kai's goal is to be a trusted partner that adds value year after year.



YOUR KAI LEADERSHIP TEAM



Vice President:
Lauren Parsons
Lauren@HiKai.com | 813-351-9491



VP of Operations:
Brian Quillen
Brian@HiKai.com | 813-474-7630



VP of District Management:
Andy Mendenhall
Andy@HiKai.com | 813-404-3507



VP of Communications/Resident Experience:
Maria Elia
Maria@HiKai.com | 813-803-1457



Controller
Ken Joines, Controller
Ken@HiKai.com - 813-742-4654



VP of Lifestyle Innovation
Eric Baker
Eric@HiKai.com | 813-474-7572

"When I need items addressed they respond, I also commend on proactively patrolling and not waiting for an issue but advise on potential issues. In my world that meets my expectations and I would recommend using Kai management Services."

District Chairman

"Our community has partnered with Kai for approximately one year, and the transition has resulted in a significant improvement in communication. Compared to our previous provider."

Happy Resident

Kai Company Overview

Legal Name, Principal Office, Headquarters and Contact Information

- Kai Connected, LLC
- 2502 N Rocky Point Drive, Suite 1000, Tampa FL 33607
- Connect@HiKai.com • 813-565-4663

Office Locations and Total Number of Employees at Each

- Tampa Office: 37
- Orlando Office: 9

Length of time in business

- Created in July 2020.

Districts Managed

- 37

Outstanding Litigations:

- None

References

Don Reichard, Chairman

DG Farms CDD
518-222-6111

Mike Ceperano, Chairman

Live Oak 1 CDD
813-417-6698

Daniel Halloway, Supervisor

Union Park CDD
904-735-0401

Zuriel Cabrera, Chairman

Watergrass II CDD
201-723-9119

Andy Lee, Amenity Manager

K Bar Ranch CDD
305-205-6546

Emily Vaughn, Chairman

Cresswind DeLand CDD
386-717-2709



ACORDTM

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/26/2026

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).

PRODUCER USI Insurance Services, LLC 2502 N Rocky Point Drive Suite 400 Tampa, FL 33607		CONTACT NAME: Susie Lones PHONE (A/C, No, Ext): 813 321-7500 FAX (A/C, No): 813 321-7525 E-MAIL ADDRESS: susie.lones@usi.com																						
INSURED Kai Connected, LLC 2161 E County Road 540A # 225 Lakeland, FL 33813-3794		<table border="1"> <thead> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A :</td> <td>Southern-Owners Insurance Company</td> <td>10190</td> </tr> <tr> <td>INSURER B :</td> <td>Technology Insurance Company, Inc.</td> <td>42376</td> </tr> <tr> <td>INSURER C :</td> <td></td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A :	Southern-Owners Insurance Company	10190	INSURER B :	Technology Insurance Company, Inc.	42376	INSURER C :			INSURER D :			INSURER E :			INSURER F :		
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INSURER D :																								
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	ADDLSUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO- ☐ LOC OTHER:		20893693	11/10/2025	11/10/2026	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 - COMP/OP AGG \$2,000,000 \$
A	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☒ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY		20893693	11/10/2025	11/10/2026	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	☒ UMBRELLA LIAB ☒ EXCESS LIAB ☒ OCCUR ☐ CLAIMS-MADE DED ☒ RETENTIONS 10000		4984574201	11/10/2025	11/10/2026	EACH OCCURRENCE \$1,000,000 AGGREGATE \$1,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? ☒ Y ☐ N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A	TWC4708465	12/16/2025	12/16/2026	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEES \$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)

Proof of coverage.

CERTIFICATE HOLDER

CANCELLATION

Kai Connected, LLC
2502 N Rocky Point Drive #1000
Tampa, FL 33607

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

[Signature]



kai*

Say hi to happy living



Rizzetta & Company
Professionals in Community Management



DISTRICT MANAGEMENT PROPOSAL

The Hammocks Community Development District

Prepared for: Board of Supervisors



Rizzetta & Company
Professionals in Community Management

June 25, 2026

Frances K. Plantikow
Chairperson
The Hammocks CDD

RE: Community Development District Management Services

Dear Frances,

Rizzetta & Company appreciates the opportunity to present our qualifications to serve as District Manager for The Hammocks Community Development District. With 40 years of experience and a state-wide presence, we are prepared to handle all present and future projects for the district.

As one of the largest providers of district management services, we are uniquely qualified to understand the complexities of managing a community development district. Our proposal outlines a knowledgeable team, including Sean Craft as your proposed Lead District Manager. He'll have the support of Matt Huber our Director of District Services, and a large team of district services professionals to ensure transition and daily operations run smoothly.

Even though you may only see your district manager at your meetings, your district would be supported by three accounting professionals, a financial associate, a director and a dedicated administrative assistant. So, you would have a team of seven that would work for your district on nearly a daily basis. All those professionals take immense pride in their work to ensure that your district always remains in compliance and fulfils all its obligations.

Thank you for your time and consideration of our proposal. We look forward to meeting with you and the Board of Supervisors to review and discuss our proposal in detail. Should you have any questions or require additional information, please feel free to contact Scott Brizendine at sbrizendine@rizzetta.com

Very truly yours,

A handwritten signature in black ink, appearing to read 'Scott Brizendine'.

Scott Brizendine
Vice President, Strategic Development & Consulting



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OUR STORY

... SO FAR

Rizzetta & Company is a Florida-based professional community management and consulting firm that provides services to residential and commercial communities throughout the state of Florida. With 40 years in the industry, Rizzetta & Company, is staffed with highly experienced managers and support staff. Each of our offices throughout Florida has a team of employees with diverse backgrounds, both personally and professionally, who provide the highest quality services to our clients.

Rizzetta & Company was founded in 1986 in Tampa, Florida by William Rizzetta. The original focus of the Company was to provide professional assessment consulting services for Community Development Districts in association with the issuance of bonds. As the Company's reputation for excellent work and customer service grew, the practice expanded over the next forty years by adding related services which resulted in today's "Full Service" organization.

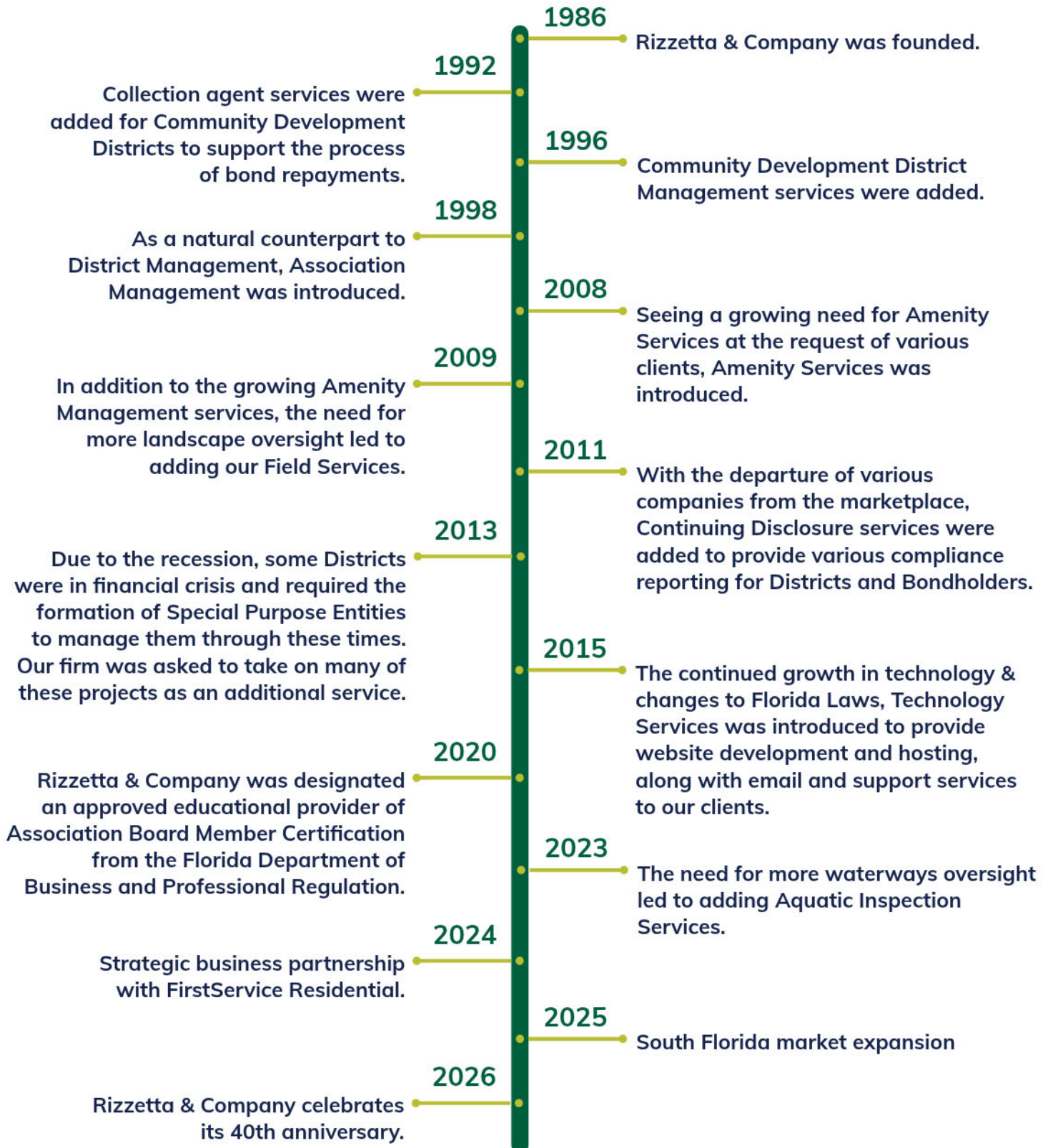
OFFICE LOCATIONS



HEADQUARTERS
3434 Colwell Avenue, Suite 200
Tampa, FL 33614



OUR MILESTONES





BY THE NUMBERS

40 

YEARS OF
EXPERIENCE
EST. 1986

150+ 

ASSOCIATION
SERVICES
CLIENTS

55 

ASSOCIATION
SERVICES TEAM
MEMBERS

25+ 

AMENITY
SERVICES
CLIENTS

100 

AMENITY
SERVICES TEAM
MEMBERS

120+ 

DISTRICT
SERVICES
CLIENTS

50 

DISTRICT
SERVICES TEAM
MEMBERS

OUR CORE VALUES





ORGANIZATIONAL CHART





AREAS OF SERVICE

Rizzetta & Company would provide professional district management services to The Hammocks CDD pursuant to Chapter 190, Florida Statutes. A brief description of these services is provided below:

Management

- Attend and conduct all regularly scheduled and special Board of Supervisors meetings, continued meetings, and workshops.
- Arrange for time and location and all other necessary logistics for such meetings.
- Ensure compliance with all statutes affecting the district which include but are not limited to:
 - » Assist in the negotiation of contracts, as directed by the Board of Supervisors.
 - » Advise the Board of Directors on the status of negotiations as well as contract provisions and their impacts on the District.
 - » Make recommendations on contract approval, rejection, amendment, renewal, and cancellation. In advance of expiration of contracts, advise the Board as to need for renewal or additional procurement activities and implement same.
 - » Monitor certificates of insurance as needed per contracts.
- Review and create as needed a periodic maintenance schedule for District assets.

The District Manager is not a role filled by an individual, rather it is a commitment by a team of motivated and skilled employees. We recognize that our role is more than an individual orchestrating a Board meeting. It is to ensure the District is fully compliant with statutory requirements and managed effectively and efficiently. Given Rizzetta's physical footprint and extensive staffing resources, we are uniquely qualified to respond to the needs of your District.





Administrative

- Prepare agendas for Board of Supervisors meetings.
- Provide accurate minutes for all meetings and hearings.
- Implement and maintain a document management system to create and save documents, and provide for the archiving of District documents per general records schedule GS1-SL.
- Certify and file the annual report to the Department of State, Library and Archive Division, for storage and disposal of public records.
- Protect integrity of all public records in accordance with the requirements of State law. Respond to public records requests as required by law and in compliance with the Rules of Procedure and the District's adopted public records policy.

Rizzetta has been electronically providing agendas to our Boards for a number of years resulting in substantial savings in printing costs to the Districts. We go one step further by providing electronic tablets to Board member for use during the meetings. This approach also allows immediate posting on the CDD website as required by statute. Audio recordings of the board meetings are stored on our Raid 5 disk array which is redundantly backed up to both a local and cloud storage appliance.

Accounting

Services include the monthly preparation of the District's financial statements in accordance with Governmental Accounting Standards, accounts payable and accounts receivable functions, asset tracking, investment tracking, capital program administration and requisition processing, filing of annual reports required by the State of Florida and monitoring of trust account activity. Rizzetta uses Sage Intacct Fund Accounting software that is designed specifically for governmental fund accounting. Our accounting processes have multi-level reviews to ensure proper internal control and accuracy. The result of our accounting infrastructure is an industry recognition by auditing firms that the books and records of Rizzetta managed districts are exceptional.

Financial & Revenue Collection

Services include investment administration of a District's bank and trust accounts, banking analyses, and related consulting services to support prudent cash management. The firm also provides all functions necessary for the timely billing, collection and reporting of District assessments in order to ensure adequate funds to meet the District's debt service and operations and maintenance obligations.

Our staff has significant expertise in assessment roll preparation and required certification to county Property Appraiser offices. Because of our experience, we enjoy a great relationship with those staff throughout the state. In addition, the required direct billings for property not on the tax roll are managed in concert with the same familiar staff.

We are organized to efficiently respond to property owner questions regarding District assessments and issue estoppel letters and lien releases as needed for property transfers



Bond Issuance Services

When the District is ready for a major augmentation that may require additional bonds; we can help by:

Preparing a Special Assessment Allocation Report;

- a) Prepare benefit analysis based on infrastructure to be funded with bond proceeds.
- b) Prepare Preliminary Special Assessment Allocation Report and present to District board and staff.
- c) Present Final Special Assessment Allocation Report to board and staff at noticed public hearing levying special assessments.

Bond Validation;

- d) Coordinate the preparation of a Bond Validation Report which states the "Not-to exceed" par amount of bonds to be issued by the District and present to board as part of the Bond Resolution.
- e) Provide expert testimony at bond validation hearing in circuit court.

Certifications and Closing Documents;

- f) Prepare or provide signatures on all closing documents, certificates or schedules related to the bond issue that are required by District Manager or District Assessment Methodology Consultant.

Because providing bond issuance services was the cornerstone on which Rizzetta was founded, our expertise in this area is unparalleled. The special assessment allocation methodology report has been continually refined over the years to reflect new financing methods that are acceptable to the industry.

Website Administration

Our Technology Services host District websites for purposes of updating records to ensure the websites remain in compliance with statutory requirements. Having this service under the same roof as District Management ensures details are not missed and critical filings are consistently observed. A third-party vendor performs the ADA mediation of the website. We also host and archive District specific e-mail accounts, if necessary.





TECHNOLOGY TOOLS & RESOURCES



Financial Management Software

Sage Intacct will simplify your accounts payable and payment processes and get convenient, secure access to all your financial information. One District account login provides access to real-time accounting information. Sage Intacct integrates with existing tools and automates processes.



Accounts Payable Automation

Avidxchange helps Sage users with a simple, streamlined and more secure way to process invoices and make payments with flexible approval workflows. AvidStrongroom for Sage Intacct and Sage 100 includes a paperless process with configurable 2-way and 3-way PO matching that offers next-level data syncing, including invoice images and custom dimensions. And by using our AvidPay solution, you'll benefit from reduced payment processing costs – helping to take your ROI to the next level.



Document Management System

SharePoint Site, a web-based collaborative platform, will allow you to quickly find District information and share files, data, news, and other resources. SharePoint empowers teamwork, seamlessly integrates with Microsoft Office, and securely connects across PCs, Macs, and mobile devices. Customize your site to streamline your District's work. Accelerate productivity by transforming processes—from simple tasks like notifications and approvals to complex operational workflows.



Project & Task Management

Monday.com is a cloud-based Work Operating System used by our teams to plan, track, and collaborate on projects. It functions as a highly visual, customizable platform where we manage daily tasks, timelines, assign responsibilities, track project deadlines, and handle operations across departments. This easy-to-use platform enables the team to customize dashboards, consolidating data from multiple sources to track budgets, workloads, and overall district project health.



Compliance View 360

Compliance View 360 is driving the property management industry forward. Using immersive video and omnidirectional cameras, the CV360 platform is helping property management companies improve efficiency and customer service by streamlining property inspections. The system lets property managers remotely inspect community infrastructure, landscaping, and compliance issues with just a few clicks, saving time and maintaining property value.



Resident Engagement & Communications*

In property management, clear resident and board communication is everything. Enumerate Engage drives better communications with mobile solutions that meet residents where they are. Board members are able to engage, task and review documents as needed. Homeowners can engage on a deeper level with daily interactions, event engagement, resource management and stay better informed.



Vendor Management Software

As leaders in the industry, we are continually looking for ways to improve the level of service we offer and protect the communities we serve. We have partnered with Vendor Information Verification Experts (VIVE) to ensure consistent compliance amongst similar vendors, speed up the review process, and allow our managers to have real-time information to properly screen vendors for insurance and trade licensing. The choice to engage with a particular vendor will always be in the hands of the board of supervisors. Our goal is to provide our clients with information to help make educated decisions.



Client Support System

Dedication to our clients is one of the driving principles at Rizzetta & Company. We're here to help our communities thrive and offer support in ways that are convenient for our board of supervisors and residents. Our integrated, client-focused system, helps our staff manage requests across platforms and efficiently connect with internal teams and external partners.

This industry-leading system allows our team to deliver immediate assistance while providing superior customer experience over the phone or e-mail. Making it easier to track, prioritize and streamline the processes to provide faster resolution.

*** To request a demo and pricing for Enumerate Engage contact tnielsen@rizzetta.com**



VALUE-ADD SERVICES



Community Asset Management

From landscaped entrances to sidewalks and parking areas, common spaces reflect the overall appeal of your community. Rizzetta & Company offers scalable, high-quality solutions that protect your investment, improve resident satisfaction, and maintain property value. Our specialized services include: community asset inspection, landscape inspection, landscape design support, arborist service, storm recovery, maintenance inspections and dispatching and more.



Amenity & Lifestyle Management

Our creates an exceptional lifestyle in your community through amenities management, events, and experienced personnel. We offer turnkey day-to-day operations for residential community clubhouses for both Community Development Districts and Associations. Our Resort-Living Lifestyle concept is about creating memories by providing innovative programs, activities, and events for residents of all ages. Our specialized services include: on-site management and support staff, lifestyle and social event, development and management of amenity, lifestyle, fitness and wellness programs, event and marketing event planning and more.



Association Services

Rizzetta & Company provides services in association management along with a complete range of accounting and financial reporting services to each of the Associations we manage. These services include financial statement preparation, coordination of budgets, billing and collecting dues, accounts payable processing, compliance with state required filings, compliance with Association covenants and ongoing analysis and reporting of the Association's finances throughout the year.



Maintenance Services

At Rizzetta & Company, we provide a reliable and efficient maintenance option that supports your district and helps simplify day-to-day operations. Our strategic vendor alliance ensures that maintenance items are handled by a licensed, trusted, and quality maintenance provider with the urgency they deserve. Our goal is to provide our clients with information to help make educated decisions. Licensed services include: HVAC, electrical, plumbing, irrigation repairs, and general maintenance.



WHY CHOOSE US?

Clients choose us because we have the experience to create robust, integrated solutions based on each District's unique needs, budget, and long-term goals.

Extensive Experience

- Rizzetta is the only "original" Community Development District Management company continuously providing services to Florida Districts since the first CDD issued bonds in 1986. Today, 40 years later, Bill Rizzetta continues to manage the company on a daily basis. In addition, Rizzetta brings extensive industry knowledge and influence at the legislative level.
- The first District Management company to successfully merge multiple separate Florida CDD's into a unified District.

Result-Driven & Client-Focused

- District Finance team has vast knowledge having been involved in over 250 separate Bond Transactions with total funding exceeding \$3 Billion; served as the Dissemination Agent for over 80 Districts; and prepared over 1,700 Tax Assessment rolls.
- District Accounting staff has been audited over 3,000 times (each District is audited annually) with no findings of internal control issues or fraudulent activity.
- We have established a dual team approach where an assigned Lead District Manager handles daily operations and the 2nd Chair District Manager ensures continuity of service by a qualified District manager when the Lead District Manager is out of the office.
- Rizzetta's continuous improvement culture compounded with relentless training of all staff provides for ever increasing levels of service and performance.

Training & Infrastructure

- As part of the transition process, we provide an Onboarding Workshop to go over responsibilities and contracts with Boards. We also offer free training sessions to new board members to gain better understanding of how the community should operate.
- Rizzetta made significant investments in its information infrastructure to harden its protection of Public Documents and enhance the electronic communication with Board members. Public documents are now protected with multi-factor authentication, cloud storage, professional patch management and hardware replacement policies.
- Rizzetta introduced "electronic agendas" to Board meetings negating the need to print and bind thousands of pages by providing electronic tablets for Board use during all meetings.



PROPOSED PRICING

District Services Provided	2026 Budget	2026 Rizzetta
Management, Administrative, Financial & Revenue Collections, and Accounting Services Attend and Conduct up to 12 Meetings and 1 Budget Workshop per Year. Administration of District Functions. Compliance Management. Budget Prep and Presentation. Implement Policies. Manage District Contracts. Obtain Proposals or Bids. Advise the Board on District Matters. Respond to Inquires from Board, Staff and Public. Administrative Fees: - For all meetings exceeding 3 hours \$200/per hour - For additional meetings \$200/per hour (includes drafting agenda, meeting attendance, and drafting of minutes)	\$47,000	\$45,000
Administrative Services Provide Minutes for All Meetings and Workshops. Public Records Repository. Preparation of 14-day Tentative and 7-day Final Agendas.		
Accounting Services Monthly Financial Package per GASB. Administration of Accounts Payable/ Receivable. Asset and Investment Tracking. Audit Support. Filing of Required Reports and Disclosures. Capital Program Administration.		
Financial & Revenue Collections Estoppel Issuance. Investment Administration. Cash and Debt Management		
Postage, Phones, Faxes, Copies ⁽¹⁾	\$275	Included
Printing and Binding ⁽¹⁾	\$100	Included
Information Technology & Website Administration Website Compliance Monitoring and Monthly Content Uploads	\$1,553	\$1,200
Office Supplies ⁽¹⁾	\$100	Included
TOTAL	\$49,028	\$46,200

(1) Postage, freight, printing, binding and office supplies included in management fees



PROPOSED PRICING

District Services Provided	2027 Budget	2027 Rizzetta
Management, Administrative, Financial & Revenue Collections, and Accounting Services Attend and Conduct up to 12 Meetings and 1 Budget Workshop per Year. Administration of District Functions. Compliance Management. Budget Prep and Presentation. Implement Policies. Manage District Contracts. Obtain Proposals or Bids. Advise the Board on District Matters. Respond to Inquires from Board, Staff and Public. Administrative Fees: - For all meetings exceeding 3 hours \$200/per hour - For additional meetings \$200/per hour (includes drafting agenda, meeting attendance, and drafting of minutes)	\$47,000	\$45,000
Administrative Services Provide Minutes for All Meetings and Workshops. Public Records Repository. Preparation of 14-day Tentative and 7-day Final Agendas.		
Accounting Services Monthly Financial Package per GASB. Administration of Accounts Payable/ Receivable. Asset and Investment Tracking. Audit Support. Filing of Required Reports and Disclosures. Capital Program Administration.		
Financial & Revenue Collections Estoppel Issuance. Investment Administration. Cash and Debt Management		
Postage, Phones, Faxes, Copies ⁽¹⁾	\$200	Included
Printing and Binding ⁽¹⁾	\$0	Included
Information Technology & Website Administration	\$1,600	\$1,200
Website Compliance Monitoring and Monthly Content Uploads		
Office Supplies ⁽¹⁾	\$0	Included
TOTAL	\$48,800	\$46,200

(1) Postage, freight, printing, binding and office cupplies included in management fees



THE HAMMOCKS CDD DEDICATED TEAM MEMBERS

Rizzetta & Company prides itself on the experience and dedication of its collective staff. When you engage Rizzetta, you have a combined group with hundreds of years of experience at your service. Our service includes a two-team District Manager approach and an after-hours answering service so your District has 24/7 coverage.



**Sean
Craft**

Lead District Manager

Sean Craft is a District Manager for Rizzetta & Company working out of our Wesley Chapel, Florida office. His portfolio includes managing eight Community Development Districts located in Hillsborough and Pasco Counties. He joined the Rizzetta team in October 2016 as a Clubhouse Attendant and has steadily worked his way up in the organization since, serving as Assistant Clubhouse Manager in 2018, and then as a Clubhouse Manager from 2018-2023 before being promoted to his current role of District Manager in April 2023. He has developed strong relationships with his Boards, residents, vendors, and on-site staff during his tenure with the company. Prior to joining Rizzetta & Company, Mr. Craft has served in a variety of roles ranging from IT sales to a USPTA Certified Elite Professional Tennis Instructor. He earned a Bachelor of Arts in Communications from Niagara University, is a Notary Public in the State of Florida, and has served as Aviation Administration in the United States Navy Reserves from 2010 through the present day.



**Matt
Huber**

2nd Chair & Director, District Services

Matthew Huber serves as Director of District Services for Rizzetta & Company, overseeing district management operations throughout Central and South Florida, including offices in Boca Raton, Tampa, Wesley Chapel, and Riverview. In this role, he provides leadership and support to district management teams while ensuring the consistent delivery of exceptional service to clients.

Mr. Huber joined Rizzetta & Company in 2006 as a District Manager serving Community Development Districts in Lee and Collier Counties. Throughout his tenure, he has held several leadership positions, including District Manager and Regional District Manager, managing portfolios of districts across Pasco, Hillsborough, Manatee, and surrounding counties. His progression within the organization reflects nearly two decades of experience in district management, operations, and client service.



Prior to joining Rizzetta, Mr. Huber worked as a Land Development Project Manager with DR Horton, where he gained extensive experience in community development and infrastructure planning. This background provides valuable insight into the development process and enhances his ability to support district operations and long-term planning initiatives.

Mr. Huber has also served as an Assistant Secretary for Community Development District Boards, providing him with firsthand experience in district governance and public administration. Earlier in his career, he interned with the Polk County Board of County Commissioners Long Range Planning Department, where he developed a strong understanding of local government operations and planning practices.

Mr. Huber earned a Bachelor of Science in Business Administration from the University of South Florida and is a Notary Public in the State of Florida.





IMMEDIATE SUPPORT FOR HAMMOCKS CDD TEAM MEMBERS



**Lucianne
Mastrionni**

Lucianne Mastrionni serves as Vice President of Business Operations for Rizzetta & Company. In this role, he oversees and supports all operational functions of the organization, including HOA and CDD Operations and Accounting; Community Services Operations encompassing Amenity Management and Community Asset Management; Human Resources; Information Technology; and Marketing. Lucianne is responsible for driving client success and retention and plays a key role in the company's strategic planning, organizational development, operational leadership, talent expansion and retention, and overall growth initiatives.

Prior to joining Rizzetta & Company, Lucianne held senior leadership roles in general management and asset management within the hospitality industry, working with globally recognized hotel brands such as Hilton, Marriott, Hyatt, and IHG. He also spent more than a decade with The Walt Disney Company, where he served in guest services operations management. Most recently, Lucianne worked in hotel development and management, overseeing new hotel construction projects and leading task force general management assignments to stabilize and recover distressed properties for major hotel ownership groups worldwide.

Lucianne holds a Bachelor of Science in Aeronautics from Embry Riddle Aeronautical University and maintains his Airline Transport Pilot (ATP) license, along with multiple additional ratings and certifications.



**Kayla
Connell**

Kayla Connell is part of the CDD management team having been with Rizzetta & Company since 2019 and manages the District Financial Services department where she and her staff are responsible for the preparation of tax rolls for the thousands of homeowners residing in Rizzetta managed Districts and the corresponding collection of the revenues from the various tax collection offices.

Additionally this department issues Estoppels for properties changing ownership, assists in individual District budget preparations and posts required disclosures to EMMA – the official source for municipal securities data and disclosure documents. She oversees the writing of assessment methodology reports for bond issuances, refundings and restructures; authoring Statement of Estimated Regulatory Costs reports for District

establishment and boundary amendment petitions.

Kayla spends some of her spare time supporting Feeding Tampa Bay, Autism Speaks as well as as playing golf. Kayla received her Bachelor of Science in Finance from the University of Central Florida.



THE TEAM



**Taylor
Nielsen**

Taylor Nielsen serves as Manager of Business Development for Rizzetta & Company, responsible for developing and executing strategic initiatives aimed at growth and expansion. Before taking on this role, Taylor served as a District Manager for accounts in Hillsborough, Manatee, and Pasco Counties.

Before joining the team at Rizzetta & Company, Taylor came from a background of Operations and Brand Management, with over 7 years of experience. During this time, Taylor worked in the tourism hotspot of Orlando, FL, where he was part of the top-level management overseeing the largest rental car operation in the world, generating over \$100 million in annual revenue.

Taylor earned a B.A. from the University of Central Florida and is a licensed Community Association Manager as well as a licensed Real Estate Sales Associate in Florida.



**Lawrence
Lakis**

Lawrence M. Lakis serves as the Client Relations Manager at Rizzetta & Company, where he focuses on understanding client needs and fostering strong, enduring relationships. He serves as the main point of contact to ensure client satisfaction, retention, and growth. Before this role, Lawrence served as a Community Manager for clients in Hillsborough and Pasco Counties.

With more than 25 years of experience in partner relations, business development, and operations, he has worked for notable companies such as IBM and Computer Associates. Additionally, Lawrence has held positions at New York-based technology and strategic consulting firms, including Neverlabs and Linx Communications.

Lawrence holds a B.A. in Psychology and Communications from Long Island University, C.W. Post, and is a licensed Community Association Manager.





WHAT OUR CLIENTS SAY ABOUT US...

The single most important factor in being successful is customer satisfaction. We understand that Tapestry Village Improvement District has certain unique characteristics. While all have similarities, our success comes from our ability to understand the nuances of each client and adapt our services, as necessary. This approach generates the basis for long-term partnerships with clients we have represented for nearly twenty years. Our service is client-centric while ensuring the district is compliant with state statutes and fulfilling bondholder obligations.

“ Rizzetta & Company is currently managing three Districts that they helped us create in the Jacksonville area. I don't know of another management firm that has the continuity and stability of Rizzetta. I have dealt with Bill Rizzetta and Melissa Dobbins and I still do today. Professionalism and customer service have always been a hallmark of their organization. ”

Bob Porter, Senior VP Land, D. R. Horton, Inc., Jacksonville

“ Rizzetta's staff have been amazing to work with, their depth of knowledge in the CDD world made a very difficult process almost painless. The Rizzetta team's depth of experience in managing CDDs proved invaluable throughout the process. Every question or situation we presented was met with prior examples and knowledgeable guidance. ”

**Andy Smith, Executive Vice President of Operations
at Freehold Companies**

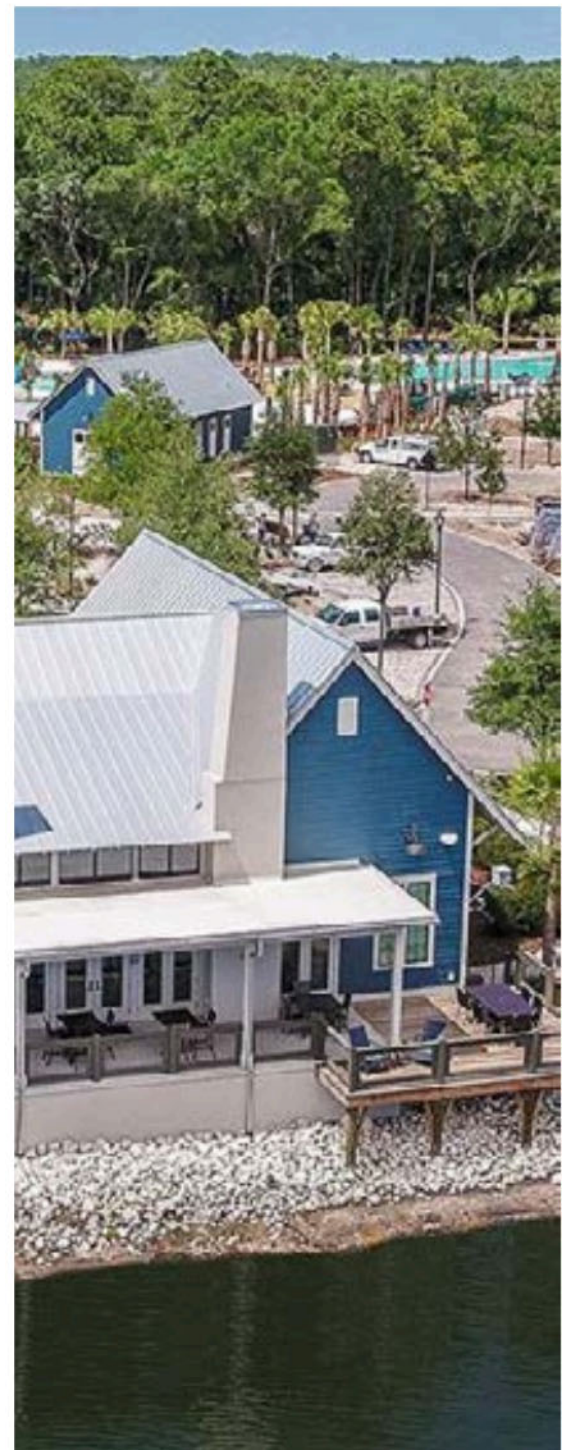
“ Rizzetta & Company has recently become the management for our Community Development District. Their positive impact within the community has been immediate. The responsiveness to issues and the professional manner in which they have been addressed has proven to be incomparable to previous management. We look forward to a relationship of many years with Rizzetta & Company. ”

**Susie White, Chairperson, The Harbourage at
Braden River Community Development District**



CLIENTS IN THE AREA

Acacia Fields
Bexley
Connerton West
Copperspring
Country Walk
Deerbrook
Del Web Bexley
Emerald Creek
GlenLakes
Grand Hampton
Harbor Bay
Hidden Creek North
Lake Padgett Estates ISD
Lakeside
Lecanto Preserve
Long Lake Reserve
Lynwood
Meadow Pointe III
Meadow Pointe IV
Milkaway
Rolling Hills
Seven Oaks
Somerset Bay
Sterling Hill
Suncoast
Talavera
University Place
Verandahs
Waterford
Waters Edge
Westbridge
Wiregrass
Wiregrass II





CLIENT REFERENCES

Marc Carlton, Chairman

Triple Creek CDD

E: mcarlton@triplecreekcdd.com

W: triplecreekcdd.com

Stephen Brown, Chairman

Covington Park CDD

E: sbrown@covingtonparkcdd.org

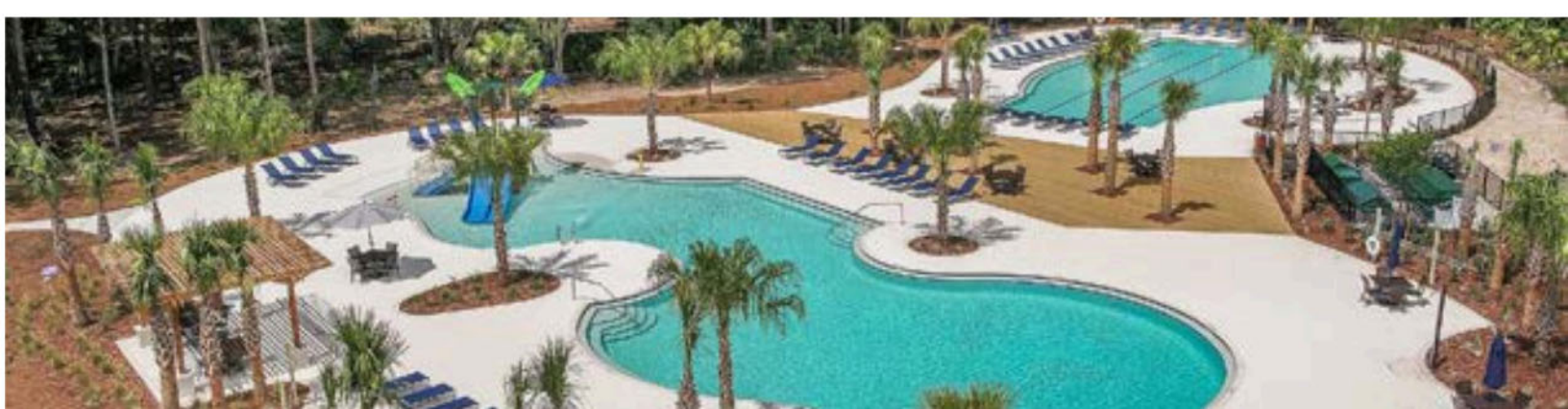
W: covingtonparkcdd.org

Steve Yarborough, Chairman

Lake Padgett Estates ISD

E: syarbrough@lakepadgettisd.org

W: lakepadgettisd.org





OUR COMMITMENT TO THE INDUSTRY

As a leader in District Management, we have a responsibility to be aware of industry-related developments and then sharing that knowledge with our clients and peers. We encourage continuing education for all staff and provide the resources needed to attend classes and conferences. Currently, Rizzetta holds memberships in the following professional organizations:

- Association of Florida Community Developers
- Community Associations Institute
- The Northeast Florida Builders Association
- Florida Government Finance Officers Association
- Florida Nursery, Growers & Landscape Association
- CFO Exchange Group
- Florida Association of Special District
- Urban Land Institute

GIVING BACK TO THE COMMUNITY



Rizzetta believes we have a responsibility to give back to the communities in which we operate. We have found the personal rewards of helping far exceeds any investments made.



Rizzetta & Company
Professionals in Community Management

WE BUILD PARTNERSHIPS THAT LAST



REGIONAL OFFICE

5844 Old Pasco Road, Suite 100
Wesley Chapel, FL 33544
813.994.1001

Celebrating 40 Years of Shaping Communities | 1.888.208.5008 | [rizzetta.com](https://www.rizzetta.com)

Municipal Advisor Disclaimer : Rizzetta & Company, Inc., does not represent the Community Development District as a Municipal Advisor or Securities Broker nor is Rizzetta & Company, Inc., registered to provide such services as described in Section 15B of the Securities and Exchange Act of 1934, as amended. Similarly, Rizzetta & Company, Inc., does not provide the Community Development District with financial advisory services or offer investment advice in any form.



**The Hammocks
Community Development District**
Proposal – District Management Services
2026





Re: Proposal for The Hammocks Community Development District

Dear Board of Supervisors,

Inframark is excited and pleased to provide a proposal for District Management services with pricing and a scope of services for The Hammocks CDD.

Our Mission is: "To be the Partner and Protector of the Most Critical Resource that helps Communities Prosper." We do this through our principles of CLEAR Partnership (Collaboration, Leadership, Excellence, Accountability, and Respect).

We strongly believe in our people and our ability to exceed our clients' expectations. These beliefs are rooted in some of the following:

CLEAR PARTNERSHIPS



- **Experience:**
 - Providing District Management Services to the State of Florida for over 45 years.
 - We provide service to over 143 CDDs and 3 Municipalities throughout Florida.
 - 20 District Managers on staff with 9 years + average tenure.
 - Our District Managers are degreed professionals with a variety of experience in IT, Finance, Government and Construction.
- **Project Management:** We can provide project management services with an Inframark employee who has Project Management experience for capital improvement projects.
- **Cost Savings:** We will review your current operating budget to identify savings opportunities or more efficient ways to operate the district.



Technology:

- **Avid Strongroom:** An advanced accounts payable system that is highly efficient and effective at making sure that District invoices are paid timely and only after review and approval by Inframark staff or a designated Board member, if desired. This system provides historical information on invoice payments, provides for creation of specialized reports, and allows Board members to review all invoices for the District through a web-based application.
 - **Customized Financial Statements and Budgets:** Inframark developed a proprietary financial operating system designed exclusively for the Community Development business allowing us to provide clients with customized financial statements and budgets. Our financial software is continually being updated and we offer our clients the ability to choose how their financial statements and budget documents will look, depending upon the preference of the Board.
- **Team Approach:** *We are more than the individual assigned to your account.* Our service to your community will include a team of 10+ professionals.
 - **Infrastructure:**
 - Full team of Health, Safety and Environmental (HSE) staff.
 - Complete internal IT support and infrastructure. We backup our servers and your information at multiple Inframark offices around the state and country to protect against catastrophic storms.
 - Team of HR professionals to assist with recruiting, employee retention and appreciation, bonus plans and more.

Inframark is committed to making continuous process improvements and service enhancements, offering new technology and processes to help keep your community on the leading edge of the industry. We are excited to implement our new service enhancements and technology for your community. All the proposed services are designed to demonstrate our desire to be a long-term partner for your community and make certain that the Board and residents are receiving the most effective and advanced services possible, all with a value-added service fee schedule.

We look forward to hearing from you concerning our proposal and further discussing these plans, along with your vision, for your community.

Chris Tarase
President
Inframark Community Management Services





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Executive Summary

Inframark Community Management Services is pleased to provide this proposal for district and field management services to the board. Inframark has been one of the leading providers of District Management and HOA services in Florida for over 45 years.

To meet the needs of your District, we provide a fully empowered local District Manager out of our Tampa area office. We provide additional support to all our clients through a central office with a regional management, support team and our structured business systems. This approach brings the strength, experience and expertise of Inframark to work proactively to address the needs of the District in the most cost-effective manner possible.

Inframark specializes in value-added services to our clients which include the following:

- **Personnel:**
 - Inframark offers one of the largest and most accomplished professional teams in the District Management business.
 - We can also bring in professionals from different disciplines to address special issues that may arise. Therefore, it is not only the number of professionals we offer to your District as a value-added service, but also our competence in addressing a wide range of complex matters that may come before your District.
 - Your assigned team has more than 50 years combined expertise and experience in the CDD business.
- **Willingness to Meet Time & Budget Requirements:** Inframark is capable and committed to meeting time and budget requirements as agreed upon with the Board and in compliance with Florida statutes.
- **Experience:**
 - Inframark is the most experienced company in the business.
 - We manage over 225 clients statewide including Community Development Districts, Special Districts, Homeowner Associations and local municipalities.
 - We specialize in customized customer service and have a client retention rate of 97.6%.
- **Capital Project Management:** Inframark has a Certified Project Manager (PMP) who has the ability to manage multi-million dollar capital improvement projects for our clients.
- **Office Locations:**
 - We have seven offices throughout the State of Florida that support our district clients. They are located in Tampa, Brandon, Wesley Chapel, Ft. Myers, Celebration, St. Augustine and Coral Springs.



- **Safety:**
 - Inframark is the only District management company who has a specialized team of Health, Safety and Environmental (HSE) professionals.
 - Documented monthly safety training for ALL Inframark personnel.
 - Disaster Preparedness Plans for staff and clients
- **Human Resource Management:**
 - Inframark has its own professional team of human resource professionals.
 - Provides drug and background screening that meet all applicable Federal and State requirements.
 - Employees complete monthly mandatory training on a wide variety of issues including sexual harassment, anti-discrimination, ethics, customer service and other important programs.
 - Regimented performance review process.
 - Spot bonus and annual merit incentives
 - Best in industry employee benefit and 401(k) program
- **Field Services:** Inframark is also able to provide the following field services with our own employees.

A complete range of Field Management and Maintenance services including but not limited to:

- Vendor management
- Contract administration
- Sidewalk grinding
- Pressure washing
- Concrete Replacement and sidewalk repair
- Monthly field services report
- Landscape reviews
- Janitorial
- A full range of general maintenance services for District and Association clients

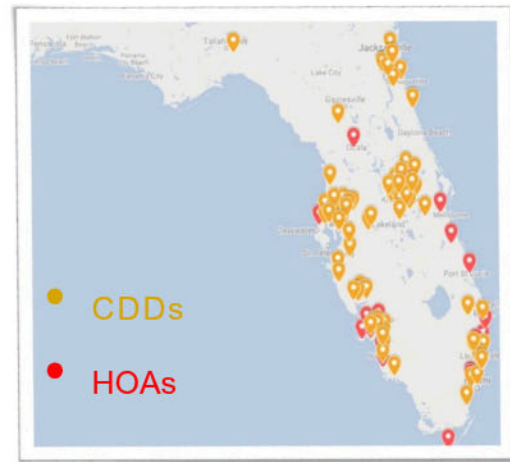


CLEAR PARTNERSHIPS

About the Company

Inframark is an organization designed to accommodate all phases of operations for Community Development Districts municipalities, commercial, and residential property owner associations. Inframark serves over 300 association partners, and over 143 Community Development Districts, and has offices throughout the State of Florida in Wesley Chapel, Tampa, Jacksonville, Celebration, Ft. Myers, and Coral Springs.

Inframark maintains a focus in serving CDDs and HOAs, and as a result, has become a leader in our industry, managing over \$250M in financial assets for our Special Districts and Association clients throughout the state.



Inframark is an active member of Community Association Institute (CAI), the Association of Florida Community Developers (AFCD), the Urban Land Institute (ULI), the Tampa Bay Builders Association (TBBA), the Greater Orlando Builders Association (GOBA), Florida Association of Special Districts (FASD), and the Florida League of Cities.

Many of our Managers are committee and Board members for these organizations, volunteering their time to advancing best practices in community and district management.

"I have been on the Board of Supervisors of the Meadow Pointe CDD in excess of ten years with over 5 years as Chairman and three years as Treasurer."

"I am totally satisfied with the service we have been and are receiving from Inframark. Our District Manager is dedicated, knowledgeable, and responsive to our needs. He is backed up by a professional staff, both locally and in Coral Springs."

"I highly recommend Inframark."

*Dennis Smith- Former Chairman
Meadow Pointe CDD*



Clients – References & Partial List

Tampa Palms Open Space and Transportation CDD

Inframark has been TPOST CDD's management partner for over 20 years. The CDD oversees a variety of community needs, including maintenance of parks and waterway management, and general community upkeep. TPOST is an icon in Florida, and we are grateful for their continued partnership for over two decades.

Two Rivers CDDs (North, South, East and West)

Two Rivers is a master-planned community of more than 6,000 planned residential homes, townhomes, apartments, and villas located North of Tampa that are enveloped by woods, grasslands, and water. Inframark has been partnered with Two Rivers since development, offering insight and solutions as Two Rivers navigates cultivating these beautiful, historical landscapes into a master-planned community filled with luxury homes connected to nature trails, agriculture, and lush springs.



Celebration CDD

Celebration is an innovative, real town that successfully combines architecture, education, health, and technology in ways that promote a strong sense of community. Celebration, conceived as a small central Florida town with pre-1940s architecture, was developed by The Celebration Company (a subsidiary of The Walt Disney Company) in Northwest Osceola County, Florida. The District's infrastructure includes village-specific roadways, bridges, domestic water distribution systems, wastewater/sanitary sewer collection systems, wetlands, and common area development.



Inframark has provided Management Services for Celebration CDD (population 8,500) since the district was established in 1994. We have been involved since inception, providing Developer Services to The Celebration Company beginning in 1993 and through the years it has evolved into its current, arguably famous state.

Inframark oversees the day-to-day management of the District with responsibilities that include field management, financial reporting, accounting, administration, budget, and city clerk activities. We routinely participate in community activities, including the Celebration K-8 ball field construction, annual holiday lighting at Market Square Park, and other field-related enhancements outside the scope of our management contract.



CLEAR PARTNERSHIPS

REFERENCES

Inframark took over as the District Management Company for the Harbour Isles C.D.D. in December of 2020 and the transition could not have gone more smoothly. Mrs. Angel Montagna was selected to be our District Manager.

Prior to the first Board of Supervisors meeting Mrs. Montagna met individually with each of us Board members to not only get to know us as people but to discuss each of our concerns as well as our visions of what we hope to achieve in the future to make Harbour Isles a better place to live. As a result of her initiative in doing this, and her research into how to help with our concerns, the first Board meeting was well prepared and organized. And this enthusiasm, organization and the feeling of her caring about our community and its residents and striving to make it a happy place to live has continued. When issues have come up, big or small, Mrs. Montagna has always been a good listener and prepared to help with the problem-solving aspect with her vast knowledge and past experiences.

We Board members know if we have a question or a concern we can contact her by phone, text or email and she will promptly answer in a respectful, pleasant, helpful manner. Her professionalism is a true asset to our community.

All of the Inframark employees I have had contact with have been extremely respectful and eager to help in any way possible, always with good results. I have learned that a company is only as good as the employees it has working for it.

I have to say that, in the 12 years I have been a member of the Harbour Isles Board of Supervisors, Inframark has to be the best that we have had.

Respectfully,
Elizabeth Fantauzzi
Harbour Isles C.D.D. Board Chairman
Appollo Beach, Florida (Hillsborough County)
Seat1@harbourislescdd.org



District (Partial List)	Region	County
Dovera CDD	Central	Seminole
Golden Lakes CDD	Central	Polk
West Lakeland WCD	Central	Polk
Brighton Lakes CDD	Central	Osceola
Celebration CDD	Central	Osceola
Enterprise CDD	Central	Osceola
Overoaks CDD	Central	Osceola
Stevens Plantation CDD	Central	Osceola
Xentury City CDD	Central	Osceola
East Park CDD	Central	Orange
Urban Orlando CDD	Central	Orange
Vista Lakes CDD	Central	Orange
Gateway Services CDD	West	Lee
Vasari CDD	West	Lee
Cedar Hammock CDD	West	Collier
Stonebrier CDD	West	Hillsborough
Naples Heritage CDD	West	Collier
Quarry CDD	West	Collier
Heritage Lake Park CDD	West	Charlotte
Heritage Oak Park CDD	West	Charlotte
Riverwood CDD	West	Charlotte
Heritage Springs CDD	West	Pasco
Lake Bernadette CDD	West	Pasco



Lexington Oaks CDD	West	Pasco
Meadow Pointe CDD	West	Pasco
Meadow Pointe II CDD	West	Pasco
Oak Creek CDD	West	Pasco
Oakstead CDD	West	Pasco
Watergrass II CDD	West	Pasco
Arbor Greene CDD	West	Hillsborough
Cordoba Ranch CDD	West	Hillsborough
Hammocks (The) CDD	West	Hillsborough
Harbour Isles CDD	West	Hillsborough
Heritage Isles CDD	West	Hillsborough
Live Oak No.2 CDD	West	Hillsborough
South Fork CDD	West	Hillsborough
South Fork East CDD	West	Hillsborough
TPOST CDD	West	Hillsborough
Waterchase CDD	West	Hillsborough
Westchester	West	Hillsborough
Spring Ridge CDD	West	Hernando
Woodlands CDD	West	Sarasota
Eastlake Oaks CDD	West	Pinellas
Lexington CDD	West	Manatee
Piney-Z CDD	West	Leon
Briger CDD	East	Palm Beach
Seminole Improvement District	East	Palm Beach
Bonterra CDD	East	Miami Dade



Beacon Lakes CDD	East	Dade
Spicewood CDD	East	Dade
Villages of Westport CDD	North	Duval
Maple Ridge CDD	East	Broward
Monterra CDD	East	Broward
Pine Tree Water Control District	East	Broward
St. Johns Forest CDD	East	St. Johns
Palm Coast Park CDD	East	Flagler
Town Center at Palm Coast CDD	East	Flagler



Pricing & Business Considerations

Inframark's Pricing	
District Management Services	\$47,000.00
Total	\$47,000.00

Additional Comments:

- Pricing is all inclusive of Accounting, Finance, Administration, and District Management.
- The assigned District Manager will be Lee Graffius, assisted by Senior District Manager Kristee Cole.



Qualifications

Meetings, Hearings and Workshops:

Inframark attends and conducts all regularly scheduled meetings. Inframark will also schedule and attend special Board meetings, continued meetings, hearings and workshops, as requested. As the District Manager, Inframark will arrange for time and location and all other necessary logistics for such meetings. For each meeting, we will prepare agenda packages for transmittal to the Board and staff at least seven days prior to the Board's meeting. Inframark will attend up to twelve meetings a year at no additional cost to the District.

Records and Administration:

Inframark has one of the largest teams of administrative professionals in the business. Our Administration Department develops all the necessary advertisements for meetings. With the size and professionalism of our Recording Department, we can provide an extremely high level of service for all our District Management clients. This service includes an unmatched level of automation of records management. Our team is aided through our searchable database that allows for quick and accurate searches for past meeting minutes and efficient responses to public records inquiries. We have dedicated staff that are assigned to handle all public record requests and are highly experienced in ensuring compliance with the requirements of Florida Statutes.

Inframark provides full compliance with all the Florida Statutes Records Requirements of Chapter 119. This includes storage of records, access to records and coordination of all responses to public record requests. In addition, Inframark is in full compliance and follows all the requirements of the Florida Administrative Code Section R.1B-24.003(1)(a), which deals with the retention of District records.

Other critical aspects of our Records Management Services Include:

Document Management:

Inframark utilizes three parallel processes to manage the documents of our clients.

- First, our electronic document management system allows access security settings to be placed on each file to prevent unauthorized editing or manipulation, thus ensuring the integrity of the document. The documents are maintained in a PDF format that is exportable to the client's Website for timely updates. We update records of District meetings (minutes, agendas and supporting documentation) to the District's Website in compliance with Florida Statutes. The document management system allows for ease of e-retrieval of documents using multiple search methods (document name, document number, document content, file type, author or the assigned retention category) to ensure all record requests are fulfilled in a timely fashion.
- Secondly, the process utilizes offsite storage of documents. Our vendor guarantees the secure storage and/or destruction of documents. Annually, upon completion of the audit, the accounting and accounts payable files are inventoried, boxed and sent to the secured offsite storage facility. All records are maintained within applicable statutory requirements.
- Finally, we maintain an onsite Master File for each client. The Master File contains previous years' audits, arbitrage reports, budgets, insurance policies and other important historical information.



Disaster Contingency & Recovery:

Disaster recovery is particularly important since the Districts we manage are in areas prone to hurricanes. Our hurricane preparedness procedure includes the following:

- Provisions for the compilation and storage of files and data required to perform critical client services
- Securing the physical office space with the protection of client files as a top priority
- Satellite phone for contingency communication with local team
- Internet and phone-based communication chains to update personnel
- The ability to shift client critical tasks and District Management services to alternate office locations both out of region or state if necessary
- Securing priority commitments from key contractors due to strong and lasting relationships

Because of the critical nature of the electronic information, we manage on behalf of our clients, Inframark emphasizes system security and has disaster recovery procedures in place to minimize the impact of storms, power outages and other similar events for the districts we serve. Our disaster recovery plans are continually updated in response to the changing needs of our business and the clients we serve.

In addition, Inframark utilizes sites certified to survive the equivalent of a Category 5 hurricane. District data is stored on servers that reside in Horsham, Pennsylvania. A full backup of all data is performed nightly and stored offsite at a remote location. Our Horsham facility is equipped with backup generator power. In addition to redundant equipment at our Houston IT center, we also have equipment co-located at other sites.

District Operations:

Inframark has twenty-two (22) District Managers throughout the State of Florida with over 130 years of District Management experience in the Florida Community Development District market. Since Inframark utilizes a team approach in the provision of all its services, we share best practices and success stories from District clients across the state. We conduct monthly manager calls in which we discuss existing issues and develop and implement solutions that are in the best interest of our clients. All Inframark team members go through monthly training to keep them up to date on a wide variety of issues that impact District operations.

The District Management team has access to all records of their Districts which includes all current and past contracts entered into by the District Board of Supervisors. With our searchable data base, it is very easy for our District Managers to review past contracts to compare with existing or proposed contracts. This allows our District Management team to keep up with contract termination dates, scope of services and fee schedules in each contract. We work closely with the Attorney for each District to ensure compliance with contract requirements and make certain that when the Board decides to terminate a vendor contract, it is done in an appropriate manner avoiding legal issues for the District.

Inframark has dedicated personnel that work with each District Manager on the renewal of District insurance requirements, including review of District facilities and working with insurance providers to develop the most cost-effective approach to insuring District facilities.



Our District Management team is highly experienced in working with District Attorneys and District Engineers in the development of Request for Proposals (RFPs) for a wide variety of District construction, capital and maintenance projects including:

- a) Development of complex bid and proposal packages
- b) Advertisement of the opportunities
- c) Analysis of the proposals and bids
- d) Development of recommendations for Board consideration

With the vast experience of our District Management team and the experience of Inframark across the State of Florida we have established excellent relationships with many vendors and contractors which brings a value-added service to the District.

Accounting and Reporting:

Inframark performs all required financial accounting functions through solid workflow processes that are designed to integrate the traditional tasks associated with accounting transactions. Those traditional accounting tasks of disbursements, accounts payable, general ledger journal entries, trial balance reconciliation and budget monitoring are knitted together in such a way to achieve:

- Fast turnaround for vendor payments
- Smooth approvals for setting up capital requisitions
- Open communications to field operations staff
- Advanced preparation for independent audit field work

Our understanding of accounting processes allows us to quickly differentiate areas needing further work and those items that are routine in nature. While there is a great deal of accounting activity that goes into ensuring the individual transactions are properly recorded in the financial records of the District, we use our expertise, our knowledge and our experience to ensure accounting theory is applied in the best interest of the District. The importance of complying with statutory requirements as well as annual disclosure to lenders and bondholders is given an interconnected focus of everyone on our staff which is appreciated and respected by our industry partners. Our accounting staff is committed to a quality standard that allows the accounting activities of the District to properly reflect its financial condition. Inframark has over 300 years of combined experience on our Finance Team.

Our finance team constantly monitors various investments instruments in Qualified Public Depositories to determine the best investment plan for District funds. Our accounting team monitors the maturity dates of District investments and alerts the District Manager so that the options for reinvestment can be brought to the Board for direction.

Audits:

Inframark has been working for decades with District auditors to make certain that each District audit is in full compliance with all GAAP and State accounting requirements. Inframark has a fully customized accounting software system that was designed for the Community Development District business that allows us to provide the most accurate and comprehensive information for all audit requirements.



Budgeting:

Inframark's customized CDD financial software system allows us to deliver options to our clients to customize their monthly financials and annual budget. Each District Manager works with their assigned accountants to develop a draft budget for consideration by the Board of Supervisors. The draft budget is based upon the input from the Board as to the goals they wish to achieve in the upcoming budget cycle.

The Inframark Assessment Team works with the District Manager and the Finance Team to present a complete picture of the revenue and expenses for each annual budget and how the proposed expenditure plan impacts the annual assessments. This approach allows our clients to see how their annual budget will impact residents (financially) and how each budget will achieve the goals set forth by the Board of Supervisors. The District Manager and Finance Team work closely with the Recording Department to ensure that all legal requirements for advertisements are met during the budgeting process. In addition, the District Manager will solicit input from the District Staff, District Engineer and District Attorney on any operation and maintenance expenditures that they believe need to be increased, decreased or eliminated as part of the new budget cycle.

Capital Program Administration:

As part of the annual budgeting process, the District Manager will solicit information from the District Engineer and District Staff on any capital projects they believe should be included in the annual budget. This includes the timing, cost, and whether a capital expenditure will increase or decrease any operation or maintenance expenditure currently included in the budget.

Inframark has many years of experience in dealing with capital bond issues and bank qualified loans for District projects. We have extensive experience in working with bond underwriters, financial advisors and various lending institutions on the establishment and implementation of capital programs for District clients. We have established procedures for making certain that specific deadlines associated with bond documents and bank qualified loan requirements are met. We have an excellent reputation of successful implementation of a wide variety of financing programs for our District clients.

Assessments and Revenue Collection:

Inframark has an exceptional record of administering annual assessment rolls for our District clients. This experience includes on roll and off roll collection. We have successfully worked with District legal counsel to accurately and timely collect off roll assessments when they are called for. We routinely conduct true up analysis for District tax rolls to ensure that all collections are being completed as per the Board's direction. Our Assessment Department also provides estoppel letters on an as needed basis at no cost to the District.

Our Treasury Services Group actively manages the revenue and investments for Districts across the State of Florida. This team ensures that the revenue generated by the District provides the financial platform to meet all its operational expenses and debt obligations. By working closely with the banking industry across our broad client base, we can provide economies of scale in the management of our banking relationships – which is passed along to the Districts we service in the form of favorably negotiated fees and service costs.

The depth and breadth of our special assessment knowledge lends opportunities to capture efficiencies and effectiveness in the collection of District revenues. We pride ourselves in our ability to interpret developer agreements to maximize cash flow for the District and satisfy cash requirements for running the operations of the District.



Effective Technology Tools and Support

Avid Strongroom Accounts Payable Processing System

- Avid Strongroom is an Accounts Payable software that automates the process of invoicing.
- Allows users to approve invoices online, streamline invoice approval processes, and monitor invoice statuses.
- Avid Strongroom reduces the risk of entry errors as the system eliminates the task of manual invoice entry.
- Scalable for Growth: Enables Inframark to streamline the invoice-to-pay process while securely managing large volumes of bank accounts and check signatures.
- Reduced Fraud Risk: Limits chances of fraud with enforced controls and customized workflows.

ADP Payroll Processing System

- ADP is an industry leader in Payroll, HR, and Tax solutions with over 75 years in the industry and 1,000,000 companies currently using ADP solutions.
- Allows for seamless payroll processing including direct deposit, physical paychecks, W-2, etc.
- Employee and manager self-service portal online and with a mobile app, allows users to access their information and records.
- Data Security: ADP is an industry leader in data security and business protection,
- Fully integrated in Inframark's Accounting software, allowing data reporting capabilities.

Microsoft Business Central Accounting Software

- Industry leader in Enterprise Resource Planning and Accounting Software.
- Cloud-Based software that ensures Inframark's districts will have current Accounting software experience, with monthly updates from Microsoft.
- Manages finances end to end: oversee your budget, accelerate month-end and year-end close, automate bank reconciliation, use unlimited dimensions, track fixed assets, and more.
- Financial reporting: Allows for scheduled financial reports based on client and internal requirements.
- Power Bi Compatibility: Allows advanced analytics by integrating Power Bi Data driven Dashboards.

A BETTER WORLD TOGETHER™



Staffing

Inframark is the only District Management firm with its own Human Resource team.

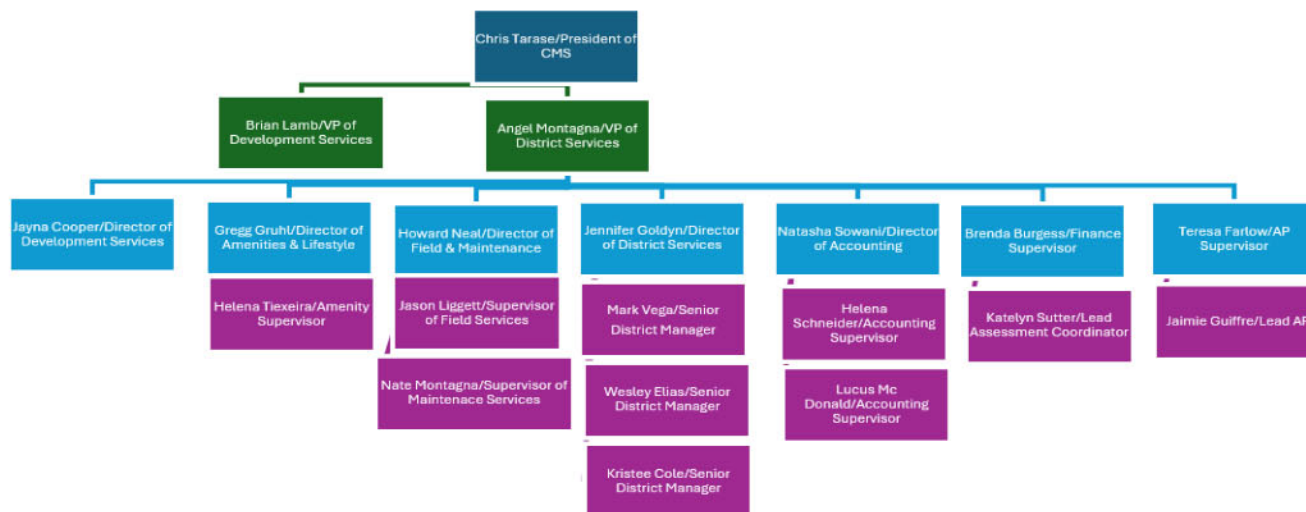
This means the following:

- Our employees are fully vetted prior to hiring
- Employees have regular performance evaluations
- We follow a progressive disciplinary policy
- We provide exceptional benefits program for our employees that other firms do not offer
- Employees have a bonus program for exceptional performance
- We offer a management bonus for employees who are responsible for financial performance goals
- 401(k) retirement plans
- Ongoing training and training incentive programs
- Tuition reimbursement opportunities
- In-house safety team and continuous safety training program for all employees

Inframark places the highest value on its employees and provides a work environment and benefits that are designed to encourage long-term employment with Inframark.

In terms of the personnel assigned to your District, Inframark will ensure to the highest degree possible that we will retain the same personnel for your District.

Organization Chart 2026





District Management:

Jennifer Goldyn, Director of District Services. Jennifer will work with the assigned team to address any issues that may develop. She is responsible for the overall performance of the Inframark District Management team. Ms. Goldyn has 10 years of district management experience and currently manages two (2) Districts, allowing her to be available to her team and Inframark clients. Her background includes over 10 years in property management and 2 years in construction management. She holds a bachelor's in business and marketing and has held a Real Estate License.

Kristee Cole, Senior District Manager, Is a seasoned Senior District Manager with nine years of experience in the CDDs, serving in both management and administrative capacities. Her well-rounded background provides her with a comprehensive understanding of district operations, governance, and financial oversight. Kristee's extensive industry knowledge, combined with her strategic and solutions-oriented approach, makes her exceptionally capable of leading districts of any size or complexity. She has a proven track record of successfully guiding newly formed residential Boards, stabilizing and turning around districts facing financial challenges, and effectively managing vendor relationships to ensure operational excellence.

Administrative Services:

Janice Swade, Senior Administrative Assistant, has been working with Inframark for 14 years as a District Recording Secretary. Her previous experience includes 13 years with The Port Authority of New York and New Jersey, working in various administrative and clerical positions, including that of Senior Executive Secretary with the Deputy Director of the World Trade Center. Ms. Swade is extremely thorough in her attention to detail with all the Districts she serves.

Accounting & Finance Team:

Teresa Farlow, Accounts Payable Supervisor, has been with Inframark since 2018 working closely with vendors, field managers, District Managers, Developers and accountants. Teresa is proficient in the accounts payable process, processing over 10,000 invoices annually.

Natasha Sowani, Director of Accounting, is a graduate of the University of South Florida with a bachelor's degree in Business Management and a minor in Accounting with over 20 years of accounting experience. Her career began in college while working at a small tax and accounting firm, then transitioned to one of our competitors where she gained industry experience in governmental accounting for CDD's. While there she managed several of their offices throughout the state.

Brenda Burgess, Finance Supervisor, began working in the special district industry in 1996 under the leadership of Gary Moyer. Brenda's responsibilities included providing administrative, management, accounting, finance and assessment services for the business. Brenda was promoted to finance supervisor and oversees all finance activities, including budget templates, assessment rolls, estoppels, and other finance and bond-related matters.



Sample Scope of Services

All services required for the management of a community development district under Chapter 189, Florida Statutes, Chapter 190, Florida Statutes and all other applicable Federal, Florida, and local laws (including the ordinance(s) and resolution(s) relating to the District and any interlocal agreements). All services should be completed on a timely basis.

District Management Services

A. Meetings, Workshops, and Hearings

1. Organize, attend, conduct, and provide minutes for all meetings, workshops, and hearings of the District.
2. Schedule such meetings, workshops, and hearings.
3. Coordinate the time, location, and all other necessary logistics (including providing conference call numbers or telephonic or virtual meeting technology).
4. Send or publish notices for meeting, workshop, hearing, and election pursuant to Florida law.
5. Provide agenda packages and meeting materials in the form requested by the Board.

B. District Operations

1. Act as the primary point of contact for District-related matters.
2. Maintain an action item list of tasks and follow ups from meetings.
3. Coordinate with the District's ADA document remediation vendor (and website vendor) to ensure the District's website has the content required by Florida (and is on the website for the appropriate duration) and includes any additional information or materials requested by the Board.
4. Consult with and advise the Board on policies, services, and responsibilities of the District and implement the Board's policies and direction.
5. Make recommendations and assist in matters relating to solicitation (competitive bidding, request for proposals, request for qualifications, etc...), approval, rejection, amendment, expiration, renewal, and termination of contracts for services, goods, supplies, or materials in accordance with the District's rules and Florida law.
6. Provide contract administration services. Such services include:
 - i. ensuring District vendors comply with the terms and conditions of a contract
 - ii. coordinating any changes to the contract that might occur over the course of the contract
 - iii. coordination with the District Engineer, District Counsel, or construction/project manager with respect to the work performed or contractual obligations
 - iv. coordinating the closeout/final payment after the vendor performed their services



CLEAR PARTNERSHIPS

7. Perform regular on-site visits to District grounds to generally evaluate and inspect the condition of the property and infrastructure and meet with District vendors and staff. Observe and report concerns or questions relating to District grounds.
8. Monitor certificates of insurance as needed per contracts.
9. Prepare and follow risk management policies and procedures.
10. Recommend and advise the Board, in consultation with the District Engineer of the appropriate amount and type of insurance for all District assets and maintenance responsibilities are included and procure and renew all applicable insurance, including but not limited to, General Liability Insurance and Directors and Officers Liability Insurance.
11. Process and assist in investigation of insurance claims, in coordination with District Counsel.
12. Negotiate on behalf of the District (when specifically authorized by the Board) with governmental entities, vendors, contractors, residents, insurance representatives, and other parties.
13. Prepare, on or before October 1 of every year, an annual inventory of all District owned tangible personal property and equipment in accordance with all applicable rules and standards.
14. Ensure compliance with all statutes affecting the District by performing the following tasks (and such other tasks required by law but not specifically identified herein):
 - i. file the name and location of the Registered Agent and Registered Office location annually with Department of Economic Opportunity and the City/County.
 - ii. provide the regular meeting schedule of the Board to the City/County.
 - iii. prepare and file annual public depositor report.
 - iv. file all required financial reports (including the Annual Audit) to the Department of Revenue, Auditor General, the City/County, and other governmental agencies with jurisdiction in compliance with Florida law.
 - v. transmit Public Facilities Report and related updates to appropriate agencies.
 - vi. file request letter to the local Supervisor of Elections for number of registered voters as of April 15, each year. Report annually the number of registered voters in the District by June 1, of each year.
 - vii. serve as the contact person for the State Commission of Ethics for Financial Disclosure coordination.
 - viii. maintain the District Seal.



C. Accounting, Reporting, and Audit Support

1. Implement an integrated management reporting system compliant with Generally Accepted Accounting Principles (GAAP) and Government Accounting Standards Board (GASB) for government and fund accounting which will allow the District to represent fairly and with full disclosure the financial position of the District. The District's accounting activities should be overseen by a degreed accountant.
2. Track and oversee the District's general, capital, reserve, and bond fund activities and provide monthly and annual financial statements (including budget to actual summary).
3. Administer the processing, review, approval, and timely payment of all bills, invoices, and purchase orders (including construction requisitions).
 - i. All vendor invoices, receipts, application for payments, etc. must be provided to the Board within 30 days of receiving it.
4. Recommend and implement investment policies and procedures pursuant to Florida law, and provide cash management services to obtain maximum earnings for District operations through investment of surplus funds to the State Board of Administration.
5. Prepare reports as appropriate under applicable law, accounting standards, and bond trust indenture requirements.
6. Provide audit support to auditors for the required Annual Audit and ensure completion of the Annual Audit and Annual Financial Statements in compliance with Florida law.
7. Assist the District in obtaining and completing a Reserve Study and complying with the findings and direction of the Board.

D. Budgeting

1. Prepare and provide for a proposed budget for Board approval and submission to the City/County in compliance with Florida law.
2. Prepare final budget and backup material for and present the budget at all budget meetings, workshops, and hearings.
3. Administer the adopted budget and prepare budget amendments on an ongoing basis as needed.

E. Assessments & Revenue Collection

1. Develop and administer the annual assessment roll for the District. This includes administering the tax roll for the District for assessments collected by the County tax collector and administering assessments for off tax roll parcels/lots.
2. Provide payoff information and pre-payment amounts as requested by property owners and collect prepayment of assessments as necessary.



3. Issue estoppel letters as needed for property transfers.
4. Maintain the District's Lien Book, in which is recorded the details of any District debt and the related debt service assessments. The Lien Book will account for all District debt and show the allocation of debt principal to assessed properties within the District.

F. Bond Compliance and Dissemination Agent

1. Oversee and implement bond issue related compliance. For example:
 - i. coordination of annual arbitrage report as required.
 - ii. transmittal of the Annual Audit, budget, and other required information to the trustee and other parties as required.
 - iii. annual/quarterly disclosure reporting as required.

G. Records

1. Maintain the "Record of Proceedings" for the District at a location within the boundaries of the County in which the District is located and include meeting minutes, resolutions, and other records required by law and provide access to such records in compliance with Florida's public records laws.
2. Serve as the District's Records Management Liaison Officer for reporting to the Department of Library and Archives pursuant to Section 257.36(5)(a), Florida Statutes.
3. Serve as the District's designated custodian of all public records of the District and comply or coordinate the compliance with the responsibilities imposed by Chapter 119, Florida Statutes. For example:
 - i. protect the integrity, confidentiality, or exemption of all public records.
 - ii. respond to public records requests in a timely, professional, and efficient manner.
 - iii. recommend best practices and services to ensure all public records of the District (including emails of the Board) are preserved pursuant to Florida law requirements.

H. Board Email Backup and Retention Services

1. Provide for or coordinate with a third-party vendor to ensure emails of the Board are backed up and retained in compliance with Florida's public records laws.
 - i. If such services are not provided directly, then the District will contract directly with such third party vendor and the costs of such services will be borne by the District.



I. Field Services

1. Perform a monthly inspection of the District's property and maintenance responsibilities.
2. Provide monthly inspection report with pictures and recommendations for repairs to the District; provided however, the Service Company shall not be responsible for performing such repairs unless otherwise agreed to by the parties in writing; and
3. Notify the District about deficiencies in the services performed by its vendors.

I. Maintenance/Porter Services – Available upon mutually agreed upon Scope and Pricing