NAPLES HERITAGE Community Development District

November 4, 2025 MEETING

AGENDA PACKAGE

The meeting will be held at:

Naples Heritage Golf & Country Club Clubhouse
8150 Heritage Club Way
Naples, Florida 34112

INFRAMARK
INFRASTRUCTURE MANAGEMENT SERVICES

11555 HERON BAY BOULEVARD, SUITE 201
CORAL SPRINGS, FLORIDA 33076

Naples Heritage Community Development District

Board of Supervisors
Kenneth Gaynor, Chairperson
Gordon Mettam, Vice Chairperson
Gary Lukens, Assistant Secretary
Georgiann Schulte, Assistant Secretary
Philip Smith, Assistant Secretary

District Staff
Justin Faircloth, District Manager
Gregory Urbancic, District Counsel

Meeting Agenda

Tuesday, November 4, 2025 – 9:00 a.m.

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1. **Call to Order and Roll Call**
2. **Approval of Agenda**
3. **Public Comment on Agenda Items**
4. **Consideration of RFQs for District Engineering Services**
   - A. Discussion of Evaluation Criteria
   - B. Responses/Statement of Qualifications
     - i. AIM Engineering & Surveying, Inc.
     - ii. Barraco and Associates, Inc.
     - iii. Johnson Engineering
5. **Business Items**
   - A. Club Updates
   - B. Fiscal Year 2025 Lake Bank Restoration Update
   - C. Fiscal Year 2026 Lake Bank Restoration Discussion Including Potential Association Costs for Drainage Work
   - D. Sidewalk Repairs Disbursement
   - E. Presentation of 1st and 2nd Quarter Website Audit Reports
6. **Staff Reports**
   - A. District Attorney
   - B. District Engineer
     - i. AIM Engineering & Surveying SUE Proposal
   - C. District Manager
     - i. Follow-Up Items
       - a. FY2025 Performance Measures & Standards Report
   - D. SOLitude Lake Management Service Reports
7. **Business Administration**
   - A. Approval of Minutes of the May 6, 2025 Meeting
   - B. Acceptance of Financial Report as of September 30, 2025
   - C. Consideration of Resolution 2026-01, Amending the Fiscal Year 2025 Budget
   - D. Consideration of Fiscal Year 2025 Audit Engagement Letter from Grau & Associates

E. Consideration of Insurance Renewal from Brown & Brown
F. Expenses Approved Under Resolution 2021-01
   i. Estimate #194 for Pine Tree Removals
   ii. Service Agreement with Pristine Lakes and Wetlands
   iii. Installation of Metal Plate Over Gutter

8. Supervisor Comments
A. Supervisor Gaynor
B. Supervisor Mettam
C. Supervisor Schulte
D. Supervisor Lukens
E. Supervisor Smith

9. Audience Comments

10. Adjournment

The next Meeting is scheduled for Tuesday, January 6, 2026 at 9:00 a.m.

Fourth Order of Business

4A

Naples Heritage Community Development District

Inframark, Community Management Services

11555 Heron Bay Boulevard, Suite 201, Coral Springs, Florida 33076
Telephone: (954) 603-0033

The Evaluation Committee will first evaluate and rank responsive proposals on the criteria listed below. The criteria are itemized with their respective weights for a maximum total of 100 points. A firm may receive the maximum points or a portion of this score depending on the merit of its proposal, as judged by the Evaluation Committee.

Responses shall be evaluated based upon the following criteria and weight: **Qualifications/Experience of the:** Firm Individuals and Sub-Consultants Assigned to Project Project Manager	**30**
References: Recent Experience in Similar Work Verification and Reference Responses	**20**
Technical: Proposed Approach and Methodology Understanding of the Scope of Work Management Capabilities	**30**
Location Considerations: Location of Office in Relation to the District	**10**
Presentation: Submittal Quality of Document/Oral Presentation	**10**
Grand Total:	

4Bi.

Naples Heritage
Community Development District

October 17, 2025 | 3:00PM

AIM Engineering & Surveying, Inc.

2161 Fowler Street | Suite 100 | Fort Myers, FL 33901
239.332.4569

Jamie W. Rivera, PE, CFM
jrivera@aimengr.com | 239.284.1901

A. *Ability & Adequacy of the Applicant's Professional Personnel*

AIM Engineering & Surveying, Inc. (AIM) was founded in 1980 in Lehigh Acres as a partnership between two professional engineers and land surveyors. In the 45 years since, the firm has been incorporated and relocated to downtown Fort Myers. We are a full-service planning, engineering, surveying, and construction management firm providing services tailored to the size and complexity of any given project. We have staff resources distributed throughout the state of Florida, with 175 employees positioned in both various support project offices and permanent offices located in Fort Myers (Corporate), Bartow, Jacksonville, Orlando, and Tampa.

From project planning to completion, our in-house experts provide services that include civil engineering; general site civil; water resources; environmental and permitting; land development; geographical information systems (GIS); construction management; construction engineering and inspection (CEI); public outreach / information; parks and recreation; project development and environment (PD&E); utilities design and locates; subsurface utility engineering (SUE); surveying and mapping; planning; transportation design; traffic operation and safety; and travel demand modeling. We also maintain Florida Department of Transportation (FDOT) prequalifications in the areas of PD&E Studies (Group 2), Highway Design (Group 3), Traffic Engineering & Operations Studies (Group 6), Traffic Operations Design (Group 7), Surveying & Mapping (Group 8), CEI (Group 10), and Planning (Group 13).

Our FDOT experience and qualifications may be relevant for any tasks that involve or affect the nearby Davis Boulevard or Collier Boulevard corridors. We are also a respected consultant for Collier County, should tasks involve connection improvements and/or drainage opportunities along these corridors. AIM has also served as a consultant to the **South Florida Water Management District,** through which our relationships, knowledge, and experience will benefit the District as we help navigate their permitting and review processes efficiently.

Specific individual affiliated with the Applicant who will be handling District meetings, construction services, & other engineering tasks.

Serving as AIM Contract Manager for the Naples Heritage Community Development District (CDD) will be Jamie W. Rivera, PE, CFM. Ms. Rivera's experience encompasses Southwest Florida land development, including project management modeling, and local and state municipality permitting, CDD representation, MS-4 reporting, establishments, and pay requisition / CDD infrastructure turnover reporting.



Jamie W. Rivera, PE, CFM

Main Point of Contact / Contract Manager

Contact Information: jrivera@aimengr.com; 239.284.1901

AIM Experience: 1.5 Years **Total Experience:** 8 Years

Education: BS, Environmental Engineering, Florida Gulf Coast University, 2018

Professional Registrations:
Professional Engineer: Florida #94230, 2022
Certified Floodplain Manager: #23-12980
Stormwater, Erosion, & Sedimentation Control: #39983, 2018

Ms. Rivera's CDD Experience: Colonial Country Club, Heritage Palms, River Hall, Bayside, Bay Creek, Hudson Creek, Paseo, Treeline, Lucaya, & Castalina

B. *Certified Minority Business Enterprise*

AIM is not a Certified Minority Business Enterprise (MBE), but we work with qualified and local MBEs on almost every engineering and construction management contract. Should the District have a task that is an opportunity for a qualified MBE firm, AIM would support the District's efforts to contract with that firm.

C. *Applicant's Willingness to meet Time & Budget Requirements*

Schedule Controls

One major asset of the AIM Team includes our project engineers' ability to communicate directly with our in-house surveying and environmental departments. This not only allows for clear communication during the data collection effort but results in a quicker response to additional data collection needs. The project requirements will be communicated directly to our survey and environmental staff and any sudden changes to the project scope or unanticipated field conditions will be coordinated and resolved immediately resulting in increased efficiency.

AIM has also worked with a multitude of engineering subconsultants in the region on a variety of projects. The relationships developed between other geotechnical, structural, and hydrogeological specialized firms will help streamline the collection, evaluation, and communication of any collected data that may be needed throughout the District's projects as applicable.

As **AIM's Contract Manager, Jamie W. Rivera, PE, CFM,** will be responsible for monitoring the project schedules and milestones that come to fruition throughout the timeline of this contract. She will assess the following items during all projects:

Critical Path: Staff availability versus work to be performed

Resource Utilization: Actual expended staff hours versus anticipated staff needs

Milestones: Deliverable dates and review periods

Schedule Feedback: Collectively evaluated by discipline leaders

Potential Delays: Identify variances to the schedule; promptly notify the District with the solution to avoid delays

Completion Percentages: Percentile figure based on staff hours to complete

The AIM team offers depth and availability of staff to keep all assigned tasks ahead of schedule. Should the District decide to expedite a project schedule to meet other scheduling or budgetary constraints, our team has ample staff with the necessary similar experience to advance the tasks within the project's critical path.

Cost Controls

Ms. Rivera will also be responsible for project cost control. It is imperative that cost be considered at all stages of each and every project. Having extensive experience in the field and hands-on construction experience allows our engineers to keep abreast with the latest construction trends and practices. This comprehensive knowledge helps to incorporate cost-efficient design features and avoid unnecessary change orders and field problems.

The AIM Team has been developing construction cost estimates for planning, preliminary engineering, and final design projects on a continuous basis for various state and local governmental entities; therefore, we are constantly updating the unit prices to reflect current economic conditions. Any construction cost estimate developed and submitted to the District for review will include the specific unit prices that were used (along with the sources) and the construction quantity estimates.

Value engineering has been defined as an organized approach to the identification and elimination of unnecessary cost. Over many years of service, AIM has developed and routinely applies effective and practical value engineering techniques to improve the overall performance and outcome of our various design projects. In addition to identifying, evaluating and selecting the best value alternatives for design, our team realizes the importance of improving the understanding of the total project by fostering better working relationships between clients, consultants, and contractors.

D. *Applicant's Experience & Performance, including but not limited to experience as a District Engineer for any CDDs & experience in Collier County, Florida.*

Experience by Scope

AIM's engineers, scientists, and planners have the multi-disciplinary expertise that aids in defining project objectives, developing process methodologies, and completing design plans, documents, and necessary permit applications. As detailed below, our experience includes projects with a wide range of scope elements.

- **Residential & Commercial Private Development:** Project management; modeling; Community District Development (CDD) representation; local, state, and municipality permitting; stormwater and utility modeling; MS-4 and other reporting; stormwater, floodplain, and wetland analysis; and surveying and mapping.
- **Public Infrastructure:** Roadways, streets, intersections, and pump stations; potable water and sewer distribution design; sidewalks and shared-use paths; and stormwater drainage improvements.
- **Construction Phase Services:** Grant funding; contract management; shop drawing review; technical specifications; public information; construction observation and inspection; and project certification.
- **General Engineering Administration:** Municipal continuing contract activities; preliminary engineering evaluations; site plan permitting reviews; land management planning; and GIS database management.
- **Surveying & Mapping:** Pre- and post-construction, construction layout, cross sections, design, drainage, utilities, easements, boundary, right-of-way, As-Builts/GIS, GPS, LiDAR, topographic survey, unmanned aerial vehicle (UAV) survey, hydrographic/ bathymetric survey, emergency post-storm survey, pre- and post-dredge, and Subsurface Utility Engineering (SUE).
- **Project Management:** Planning; resource management; stakeholder communication; quality control; cost control; schedule maintenance; documentation and reporting; and construction oversight
- **Construction Engineering & Inspection (CEI):** Rural, urban, and interstate roadway, bridge, signals, lighting, sidewalk, safety, drainage, and utilities improvements.
- **Construction Management:** Transportation construction; utilities; drainage; water treatment facilities; stormwater management facilities; and parks and recreation amenities.
- **Water Resources & Stormwater Management:** Flood mitigation and stormwater storage solutions; master planning; hydrology and hydraulics modeling; and water control structure design.
- **Environmental Assessments & Permitting:** Species habitat assessments; wetland delineations; resource agency permitting; ecological restoration; and mitigation design.
- **Hydrologic & Ecosystem Restoration:** Channelized filter marshes; littoral zone design; water quality improvement; TMDL and BMAP analysis; and dredging.













Experience as District Engineer / with Community Development

AIM has provided professional services to special districts formed under Chapter 189, 190, and 298 of Florida Statutes in Southwest Florida. Together, AIM and Ms. Rivera's experience ranges from advising CDDs on a variety of services, including road resurfacing and improvements; establishment of a Permit Criteria Manual to guide phased development; inspection of ponds and wetlands; resolution of drainage issues; assessment of pavement condition; surveys of traffic signage and pavement markings; review of sidewalks and ADA-compliance issues; modification of SWMS; upgrade to irrigation and maintenance facilities; and preparation of GATSB 34 accounting statement. Similar contracts AIM's proposed team members have worked on include:

- Professional Engineering Services – Colonial Country Club Community Development District (CDD)
- Professional Engineering Services – Heritage Palms Golf & Country Club – CDD
- Gateway Services Miscellaneous Construction Inspection – Gateway Services CDD
- Countywide Permitting & Mitigation – Lee County
- MSTBU Master Contract – Lee County
- Captiva Adaptation Plan & Public Private Implementation Analysis – Captiva Erosion Prevention District (CEPD)
- Professional Services Engineer – Lee County Electric Cooperative (LCEC)
- East Mulloch Drainage District (EMDD) Engineer – EMDD
- General Engineering Services – Lehigh Acres Municipal Services Improvement District (LA-MSID)
- Surveying & Mapping Master Agreement – South Florida Water Management District (SFWMD)
- General Engineering & Professional Services – Southwest Florida Water Management District (SWFWMD)
- Environmental Consultant/Engineering Services CSC – West Coast Inland Navigation District (WCIND)

Experience with Collier County

AIM has more than 20 years of experience providing professional services for Collier County, with proven expertise in transportation, stormwater, and utility infrastructure. Our foundation in subsurface utility engineering (SUE), surveying and mapping, permitting, and construction inspection ensures projects are designed for constructability, executed to specification, and fully compliant with regulatory standards. A balanced portfolio of roadway, utilities, stormwater projects, as well as miscellaneous improvements, such as sidewalks and pedestrian pathways, along with long-standing partnerships with Collier County, demonstrates our ability to deliver practical solutions. This experience uniquely positions AIM to support the Naples Heritage CDD in addressing current infrastructure needs while planning effectively for future growth. Below is a sample of recent/current contracts and projects successfully delivered to the County.

Contracts

- Countywide Engineering Services: Planning, Roads, CEI, SUE, & Survey
- Professional Services Library: Architecture & Engineering
- Professional Services Library: Civil Engineering
- Professional Services Library: Construction Management Services
- Professional Services Library: Planning & Design
- Professional Services Library: Surveying & Mapping
- Collier County MPO – General Planning
- Continuing CEI Services Contract for LAP Funded Projects

Projects

- Goodlette-Frank Stormwater & Ditch Improvements (Section B) – *Design, Permitting, Survey, & SUE*
- YMCA Road WM Abandonment & Replacement – *Design, Permitting, Survey, SUE, & Construction Phase Services*
- Corkscrew Road Safety Improvements – *Design & Construction Phase Services*
- White Boulevard Widening – *Design, Survey, SUE, Permitting, Utility Coordination, & Post-Design Services*
- Inland Tidal GIS Waterway Assessment – *Engineering Services for Inspection & Evaluation of Designated Waterways*
- Naples Park Wastewater Basin 101 Master Pump Station – *Survey & SUE*
- Freedom Park Bypass Ditch Improvements – *Construction Engineering & Inspection*
- Golden Gate City Transmission Water Main Improvements – *Construction Engineering & Inspection*
- I-75 / Pine Ridge Road Interchange – *Sidewalk Feasibility Study*
- Collier County Traffic Impact Studies – *Review of Traffic Impact Studies (each fiscal year dating back to 2016)*

Performance

Below we have provided details related to clients with whom we have similar contract experience. These clients serve as reference as to our ability to perform at an exceptional degree of quality, beyond our clients' expectations.

Client: Premier District Management for Colonial Country Club CDD & Heritage Palms CDD
Address: 3820 Colonial Blvd., Suite 101, Fort Myers, FL 33966
Contact: Cal Teague, District Manager
E-mail: cteague@cddmanagement.com
Phone: 239.850.0992

Client: Lehigh Acres Municipal Services Improvement District
Address: 601 East County Lane, Lehigh Acres, Florida 33936
Contact: Michael Cook, Assistant District Manager
E-mail: mcook@la-msid.com
Phone: 239.292.7491

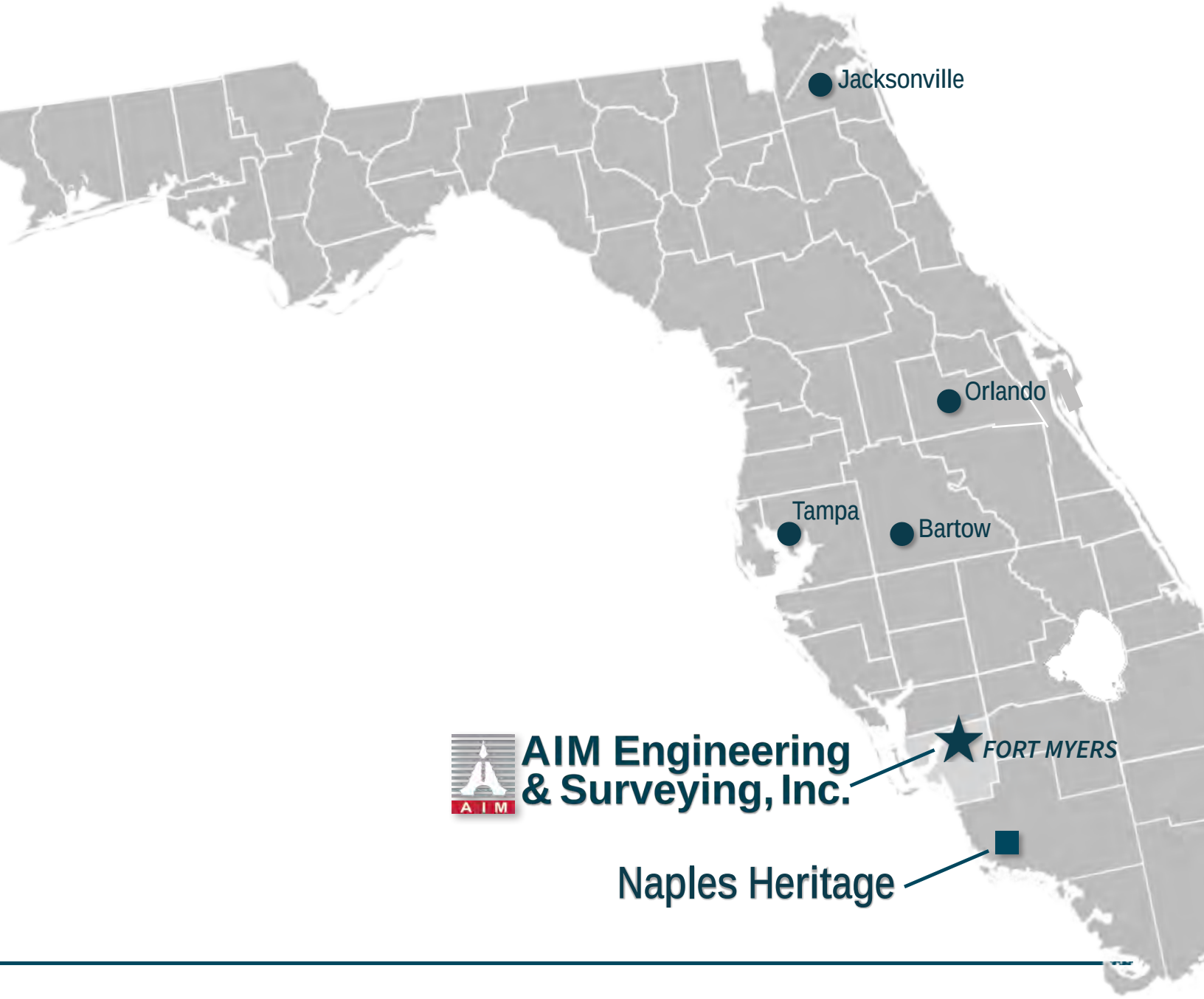
Client: Hendry County
Address: 99 East Cowboy Way, LaBelle, FL 33935
Contact: Shane Parker, PE, County Engineer
E-mail: sparker@hendryfla.net
Phone: 863.675.5222

Client: City of Sanibel
Address: 800 Dunlop Road, Sanibel, FL 33957
Contact: Holly Milbrandt, Natural Resources Director
E-mail: holly.milbrandt@mysanibel.com
Phone: 239.472.3700

E. *Geographic Location of the Applicant's Headquarters & Offices*

AIM's headquarters and the responsible office for this contract is located in downtown Fort Myers. We also have permanent technical offices in Bartow, Jacksonville, Orlando, and Tampa, and field offices throughout Florida.

- **Fort Myers – Corporate / Contract Office:** 2161 Fowler Street, Suite 100, Fort Myers, FL 33901
- **Bartow:** 195 S Orange Avenue, Suite 1, Bartow, FL 33830
- **Jacksonville:** 4600 Touchton Road, Building 100, Suite 120, Jacksonville, FL 32246
- **Orlando:** 20 North Orange Avenue, Suite 605, Orlando, FL 32801
- **Tampa:** 201 East Kennedy Boulevard, Suite 1800, Tampa, FL 33602



F. *Current & Projected Workload of the Applicant*

We have conducted an evaluation of our team's current workload, as indicated below, and we are confident that we have more than sufficient resources, as the majority of our current workload is in the final stages. Additionally, we are 100% committed to assigning the key individuals identified on our organizational chart to this contract.

PROJECT	CLIENT	STATUS
Tract J4 Sanitary Sewer Utilities Turnover	Naples Heritage CDD	Providing limited assistance w/Utility Owner conveyance issues
Concrete Plan Site Design	Private / Land Dvlpmnt	Providing permitting assistance
YMCA Retrofit	Private / Land Dvlpmnt	Providing permitting assistance
Caron Commercial	Private / Land Dvlpmnt	Permitting stage
Frank Mann Preserve Hydrologic Restoration	LA-MSID	Working on 100% plans & permitting applications
Boca Grande Tennis / Pickleball Court Retrofit	Lee County	Providing limited construction-phase services
Cape Coral Alleyway Improvements	City of Cape Coral	Providing limited construction-phase services
Caloosahatchee River Estuary Storage & Treatment (CREST) Facility, Phase III	LA-MSID	Providing limited construction-phase services
Rehydration of Bedman (Creek) Utilizing Storage & Treatment (ROBUST)	LA-MSID	Working on final design & permit applications
Alva Community Park	Lee County	Project initiation stage
Boca Grande Additional Parking	Lee County	Project initiation stage

G. *Volume of work awarded to the Applicant by the District*

The Naples Heritage Community Development District has not previously awarded a $5,000 contract to AIM Engineering & Surveying, Inc. to provide services related to Tract J4 Sanitary Sewer Utilities Turnover.

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION *(City and State)*
NAPLES HERITAGE COMMUNITY DEVELOPMENT DISTRICT *(Collier County, Florida)*

2. PUBLIC NOTICE DATE	3. SOLICITATION OR PROJECT NUMBER
September 2025	**Request for Qualifications for Engineering Services**

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE
Jamie W. Rivera, PE, CFM / Contract Manager

5. NAME OF FIRM
AIM Engineering & Surveying, Inc.

6. TELEPHONE NUMBER	7. FAX NUMBER	8. E-MAIL ADDRESS
239.284.1901	855.731.7971	jrivera@aimengr.com

C. PROPOSED TEAM

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

	(Check) PRIME	(Check) J-V PART-NER	(Check) SUB-CON-TRAC-TOR	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
a.	☒	☐	☐	AIM Engineering & Surveying, Inc. ☐ CHECK IF BRANCH OFFICE	2161 Fowler Street, Suite 100 Fort Myers, Florida 33901	Project Management; Geographic Information Systems; Civil Engineering; Environmental / Permitting; Construction Management / Inspection
b.	☐	☐	☐	☐ CHECK IF BRANCH OFFICE		
c.	☐	☐	☐	☐ CHECK IF BRANCH OFFICE		
d.	☐	☐	☐	☐ CHECK IF BRANCH OFFICE		
e.	☐	☐	☐	☐ CHECK IF BRANCH OFFICE		
f.	☐	☐	☐	☐ CHECK IF BRANCH OFFICE		
g.	☐	☐	☐	☐ CHECK IF BRANCH OFFICE		
h.	☐	☐	☐	☐ CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM ☐ *(Attached)*

Naples Heritage Community Development District

PRINCIPAL
Jerron K. Hull, PE

CONTRACT MANAGER
Jamie W. Rivera, PE, CFM

SENIOR PROJECT ENGINEER / QC MANAGER
Steve Neff, PE

DESIGN

SENIOR ENGINEERS
Jamie W. Rivera, PE, CFM
Daniel Schroeder, PE, MSE, PMP
Steve Neff, PE

DESIGN / CADD SUPPORT
Max Rivera, EI
Giovanni Arriaga, EI
6 Student Interns

ADDITIONAL RESOURCES

CONSTRUCTION SUPPORT

Lee Flynn, PE
CEI & Construction Manager

Senior Project Engineers	5
Project Administrators	9
Inspection Staff	18
Office Support	7

SURVEY & MAPPING SUPPORT

Grant Fichter, PSM
Senior Surveyor & Mapper

Professional PSM	6
CADD Technicians	4
Crew Chiefs	8
Survey Crews	8
SUE Crews	5
Office Support	15

ENVIRONMENTAL SUPPORT

Chris Salicco
Senior Environmental Scientist

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Jerron K. Hull, PE	**President & CEO Principal-in-Charge**	30	30

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
BS, Civil Engineering, University of Florida, 1997	Professional Engineer, Florida #59365

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Mr. Hull offers unique hands-on experience within AIM, serving the firm from an administrative role as President/Chief Executive Officer overseeing the daily operations of the firm, as well as a technical role overseeing the management of design and construction engineering and inspection projects throughout Florida and ensuring constant Quality Control. His background combines 25 years of experience in all disciplines of the company, including positions as Survey Party Chief, Engineering Technician/Designer, Senior Project Engineer, Project Manager, Quality Assurance/Quality Control Manager, and Project Principal. Over the years, Mr. Hull has developed strong professional relationships with our clients, including many local, state, and federal agencies, and has been named as one of the top "40 Under 40" up-and-coming executives in Southwest Florida.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lehigh Acres Municipal Services Improvement District (LA-MSID) General Engineering Services / District Engineer, Lee and Hendry Counties, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Principal on this contract. AIM has held the contract for more than 20 years and is responsible for providing professional engineering services to assist LA-MSID with the maintenance of their drainage system infrastructure that includes 100-square-miles of canals, weirs, ditches, and drainage piping. Services include making day-to-day engineering decisions, providing watershed planning, designing capital improvements, inspecting construction, directing major maintenance operations, and advising the Board of of Commissioners on various engineering matters.

b.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Miscellaneous Professional Services Contract, Lee County, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Principal on this contract for Lee County. Projects under this contract include Wild Turkey Strand – Surface Water Diversion, Yellow Fever Creek Restoration, and Post Irma Flooding Analysis. Tasks included a topographic survey, environmental assessments, and surface water analysis to prepare plans, documents, and permit applications for proposed restoration enhancements, as well as assisting with the bidding and construction phase, hydrologic and water quality modeling, and drainage evaluation.

c.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Jordan Marsh Water Quality Treatment Park, Sanibel, Florida	03/19	03/19

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Principal for the design, engineering, and permitting of this Water Quality Treatment Park located on a portion of public and private conservation land near the intersection of Periwinkle Way and Casa Ybel Road on Sanibel Island, adjacent to the Sanibel River. AIM's design of the Jordan Marsh Water Quality Treatment Park maximizes opportunities for water quality improvement and storage and provides expanded recreational opportunities and improved habitat for the enjoyment of residents and visitors of Sanibel Island. Additional project elements included environmental assessment, topographic survey, and post-design services. Two change orders were later added to the scope; one for legal sketch and description for a proposed easement and legal sketch and description for an as-built intake pipe.

d.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lee County Municipal Service Benefit Unit Projects Consulting Engineer, Lee County, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Principal for two consecutive terms on this contract for Lee County Municipal Service Benefit Unit. AIM serves as District Engineer for projects that include retrofitting older neighborhoods with new water and sewer systems, new roads, and drainage facilities to mitigate flooding hazards and preparation of parcel maps with legal descriptions and sketches for easements and right-of-way stakes. Projects have included San Carlos Drive Improvements – Design & Construction Services; Emily Lane Water and Sewer Systems Replacement – Design, Permitting, & Construction Services; Airport Woods Commerce Center Water Treatment Plant – Planning, Design, Survey; Homestead Road Roadway & Drainage Improvements – Design, Survey, & Construction Services.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Jamie W. Rivera, PE, CFM	**Contract Manager**	8	1.5

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
BS, Environmental Engineering, Florida Gulf Coast University, 2018	Professional Engineer, Florida # 94230 Certified Floodplain Manager #23-12980 Stormwater, Erosion, & Sedimentation Control #39983

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Ms. Rivera is a Project Manager with experience in Southwest Florida land development, including project management modeling, local and state municipality permitting, Community District Development representation, MS-4 reporting, establishments, and pay requisition/ CDD infrastructure turnover reporting. Throughout her career as a land development professional engineer, Ms. Wilson has had the opportunity to work on a wide range of projects that have included designing complex drainage systems for commercial developments to providing oversight during the construction of residential communities, she has always been driven by a passion for creating spaces that are not only functional but also aesthetically pleasing. With a keen eye for detail and a deep understanding of the latest industry trends and technologies, she is confident in her ability to tackle any project and deliver results that exceed even the highest expectations.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Captiva Adaptation Plan & Public Private Implementation Analysis, Captiva, Florida	04/24	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Project Manager for tasks assigned as a subconsultant to APTIM for the Captiva Erosion Prevention District. AIM was responsible for Public Private Implementation Analysis and Adaptation Plan, including opportunities for flood control, for this $27M project. The renourishment consists of the placement of approximately 800,000 cubic yards of beach fill along 4.85 miles of shoreline and rehabilitation of existing dunes that were destroyed during Hurricane Ian in late 2022. The contract calls for fill along the entire Gulf of Mexico shoreline of Captiva Island between Redfish Pass and Blind Pass and may include the restoration of dunes and vegetation. Various funding sources have been procured, including an additional $13.2M in grants from the Florida Department of Environmental Protection.

b.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Caron Commercial Development, Lehigh Acres, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

AIM is providing engineering and permitting assistance for a ±1.0-acre parcel of land consisting of five lots in platted Lehigh Estates. The project includes engineering design and permitting assistance for the site development of two commercial buildings and associated parking, drive aisles, stormwater management system, and supporting utility infrastructure. The scope of work is limited to design and permitting services for the site's non-vertical elements; tasks include project coordination and team meetings; civil engineering services, including conceptual site plans, construction plans, and temporary impact statement; permitting for FDOT, LAMSID, Lee County Development Order, FDOH, Lee County well permit, and SFWMD; and limited engineering construction observation and post-construction services. The project also includes environmental (BearPaws) and landscape architect (DMJA) services, both provided by subconsultants.

c.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Boca Grande Tennis & Pickleball Courts Renovation, Boca Grande, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

AIM is providing design, permitting, survey, SUE, post-design, and construction phase services for the new construction and renovation of facilities at Wheeler Road Community Park in Boca Grande. The park now has two existing tennis courts, a restroom, chain-link fencing, and lighting. The project includes reconstructing the existing tennis courts, constructing four new pickleball courts to the south of the property, new parking, a chain-link fence, sidewalks, addition of a prefabricated shade structure, a larger restroom, and a 6'-wide concrete path along the Boca Grande Dog Park fenced area.

d.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Commercial Out-Parcel, Charlotte County, Florida	03/22	10/23

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☐ Check if project performed with current firm

This project included commercial out-parcel within an existing ±70 acres mixed use development; City of Fort Myers, SFWMD, FDEP, and FDOT drainage connection exemption; Permitting submittals; Storm Tech subsurface chamber design and utility modeling; and FDOT stormwater analysis

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Daniel Schroeder, PE, MSE, PMP	**Senior Project Engineer**	16	15

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
MSE, Sustainable Water Engineering, Florida Gulf Coast University, 2021 BS, Civil Engineering, Minor Environmental Engineering, Florida Gulf Coast University, 2009	Professional Engineer, Florida # 78646 Project Management Professional #3917244

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Mr. Schroeder serves as Vice President and Manager of our Civil Group. As Civil Group Manager, he is responsible for overseeing a team of engineers, business development, ensuring the timely and cost-efficient completion of projects, and instituting ongoing communications between the client and contractor. He is an experienced Designer and EOR, with a background involving project management of prominent engineering and construction projects, hydrologic and ecosystem restoration, roadway and public infrastructure, and flood mitigation and stormwater storage solutions.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lehigh Acres Municipal Services Improvement District (LA-MSID) General Engineering Services / District Engineer, Lee and Hendry Counties, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Chief Project Manager (Contract Manager) on the current iteration of this contract. AIM has held the contract for more than 20 years and is responsible for providing professional engineering services to assist LA-MSID with the maintenance of their drainage system infrastructure that includes 100-square-miles of canals, weirs, ditches, and drainage piping. Services include making day-to-day engineering decisions, providing watershed planning, designing capital improvements, inspecting construction, directing major maintenance operations, and advising the Board of of Commissioners on various engineering matters.

b.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Goodlette-Frank Road Stormwater & Ditch Improvements, Section B, Naples, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Engineer of Record for the design, permitting, survey, and SUE improvements to approx. one mile of existing ditch located along the west side of Goodlette-Frank Road. The project provides efficient maintainable drainage for this conveyance facility that serves Goodlette-Frank Road and abutting developments. The design addresses bank stabilization; the border between the ditch and adjacent properties to the west; stormwater flow capacity, with a design that provides for an adequate flood protection level of service for the area against a twenty-five (25) year, three (3) day storm event; landscaping/beautification; and allows for continuous maintenance and inspection.

c.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Jordan Marsh Water Quality Treatment Park, Sanibel, Florida	03/19	03/19

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Project Engineer for the design, engineering, and permitting of this Water Quality Treatment Park located on a portion of public and private conservation land near the intersection of Periwinkle Way and Casa Ybel Road on Sanibel Island, adjacent to the Sanibel River. AIM's design of the Jordan Marsh Water Quality Treatment Park maximizes opportunities for water quality improvement and storage and provides expanded recreational opportunities and improved habitat for the enjoyment of residents and visitors of Sanibel Island. Additional project elements included environmental assessment, topographic survey, and post-design services. Two change orders were later added to the scope; one for legal sketch and description for a proposed easement and legal sketch and description for an as-built intake pipe.

d.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
YMCA Road Water Main Abandonment & Replacement, Naples, Florida	06/23	06/23

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Project Engineer on a Collier County Professional Services Contract to replace aging infrastructure and install a new potable water main along YMCA Road in Naples. Phase I involved expedited design deviation, bidding, and construction support for the emergency grouting and in-place abandonment of about 150 LF of failing asbestos concrete water main under Airport Pulling Road. Phase II included survey, SUE, design, permitting, and bidding for improvements such as removing 700 LF of asbestos cement main, grouting 300 LF, and installing 1,100 LF of new 8" water main. It also incorporated associated appurtenances like fire hydrants, gate valves, air release valves, permanent sample points, and the relocation/reconnection of water services.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Steve Neff, PE	**Senior Project Engineer / QC Manager**	48	8

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
BS, Civil Engineering, Purdue University, 1978	Professional Engineer, Florida # 33205

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Mr. Neff's lengthy career has been dedicated to the Engineering, Construction, and Public Works sectors; having spent 30+ years with the City of Cape Coral in various roles, including Public Works Director. His role with the City required extensive interaction with the City Manager and City Council, as well as various Department Heads, governmental agencies, and consulting firms. His experience gives him a profound understanding of various areas of public and corporate interests, including contract management, team building, negotiations, budget planning, and public presentations; all of which he has channeled into his role as Contract Manager/Project Director for AIM on numerous projects and multiple task-based/continuing services contracts.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lehigh Acres Municipal Services Improvement District (LA-MSID) General Engineering Services / District Engineer, Lee and Hendry Counties, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Project Manager / Senior Engineer on this contract. AIM has held the contract for more than 20 years and is responsible for providing professional engineering services to assist LA-MSID with the maintenance of their drainage system infrastructure that includes 100-square-miles of canals, weirs, ditches, and drainage piping. Services include making day-to-day engineering decisions, providing watershed planning, designing capital improvements, inspecting construction, directing major maintenance operations, and advising the Board of of Commissioners on various engineering matters.

b.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Goodlette-Frank Road Stormwater & Ditch Improvements, Section B, Naples, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Project Manager for the design, permitting, survey, and SUE improvements to approx. one mile of existing ditch located along the west side of Goodlette-Frank Road. The project provides efficient maintainable drainage for this conveyance facility that serves Goodlette-Frank Road and abutting developments. The design addresses bank stabilization; the border between the ditch and adjacent properties to the west; stormwater flow capacity, with a design that provides for an adequate flood protection level of service for the area against a twenty-five (25) year, three (3) day storm event; landscaping/beautification; and allows for continuous maintenance and inspection.

c.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Jordan Marsh Water Quality Treatment Park, Sanibel, Florida	03/19	03/19

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Project Director for the design, engineering, and permitting of this Water Quality Treatment Park located on a portion of public and private conservation land near the intersection of Periwinkle Way and Casa Ybel Road on Sanibel Island, adjacent to the Sanibel River. AIM's design of the Jordan Marsh Water Quality Treatment Park maximizes opportunities for water quality improvement and storage and provides expanded recreational opportunities and improved habitat for the enjoyment of residents and visitors of Sanibel Island. Additional project elements included environmental assessment, topographic survey, and post-design services. Two change orders were later added to the scope; one for legal sketch and description for a proposed easement and legal sketch and description for an as-built intake pipe.

d.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lee County Municipal Service Benefit Unit (MSBU) Consulting Engineer Lee County, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Contract Manager / Engineering Manager on this master contract, with tasks that have included retrofitting older neighborhoods with new water and sewer systems, new roads and drainage facilities to mitigate flooding hazards, and preparation of parcel maps with legal descriptions and sketches for easements and right-of-way stakes. STA 3 under this contract, known as Cherry Estates Road Resurfacing, required the milling and resurfacing of the roadway. AIM was tasked with providing professional services including surveying, preparation of contract document specifications for bidding, and engineering construction services.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Max Rivera, EI	**Engineering / CADD Support**	5	<1

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
BS, Civil Engineering, Florida Gulf Coast University, 2023	Engineer Intern, Florida # 1100028011

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Mr. Rivera is an Engineer Intern. He has land development engineering internship experience in Southwest Florida. Stormwater management system modeling via Bentley Pondpack in SFWMD and SWFMWD; pipe sizing and surface water modeling via Bentley StormCAD; pressure pipe modeling, pump station calculations, and fire flow modeling via Bentley WaterCAD; Also, Excel spreadsheet creation to assist with and integrate calculations and design information. His experience includes working on county and city projects, stormwater and utility modeling, AutoCAD and Civil 3D design, project permitting, and small-scale project management.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)
Caron Commercial Development, Lehigh Acres, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE

☒ Check if project performed with current firm

Engineer Intern for design and permitting assistance for a ±1.0-acre parcel of land consisting of five lots in platted Lehigh Estates. The project includes engineering design and permitting assistance for the site development of two commercial buildings and associated parking, drive aisles, stormwater management system, and supporting utility infrastructure. The scope of work is limited to design and permitting services for the site's non-vertical elements; tasks include project coordination and team meetings; civil engineering services, including conceptual site plans, construction plans, and temporary impact statement; permitting for FDOT, LAMSID, Lee County Development Order, FDOH, Lee County well permit, and SFWMD; and limited engineering construction observation and post-construction services. The project also includes environmental (BearPaws) and landscape architect (DMJA) services, both provided by subconsultants.

b.

(1) TITLE AND LOCATION (*City and State*)
Tsala-Apopka Golf Course Structure Modification, Inverness, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
08/18	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE

☒ Check if project performed with current firm

Engineer Intern assisting with construction phase oversight for the modification of an existing operable water control structure to improve flow into the Inverness Pool and assists with flood protection within the Tsala Apopka Chain-of-Lakes. Design, permitting, and survey services were completed in August of 2018, prior to Mr. Rivera's Employment with AIM.

c.

(1) TITLE AND LOCATION (*City and State*)
Goodlette-Frank Road Stormwater & Ditch Improvements, Section B, Naples, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE

☒ Check if project performed with current firm

Engineering Intern for the design, permitting, survey, and SUE improvements to approx. one mile of existing ditch located along the west side of Goodlette-Frank Road. The project provides efficient maintainable drainage for this conveyance facility that serves Goodlette-Frank Road and abutting developments. The design addresses bank stabilization; the border between the ditch and adjacent properties to the west; stormwater flow capacity, with a design that provides for an adequate flood protection level of service for the area against a twenty-five (25) year, three (3) day storm event; landscaping/beautification; and allows for continuous maintenance and inspection.

d.

(1) TITLE AND LOCATION (*City and State*)
Commercial Out-Parcel, Charlotte County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
03/22	10/23

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE

☐ Check if project performed with current firm

This project included commercial out-parcel within an existing ±70 acres mixed use development; City of Fort Myers, SFWMD, FDEP, and FDOT drainage connection exemption; Permitting submittals; Storm Tech subsurface chamber design and utility modeling; and FDOT stormwater analysis

e.

(1) TITLE AND LOCATION (*City and State*)
YMCA Retrofit, Arcadia, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
04/24	Unknown

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE

☐ Check if project performed with current firm

The project is a private-public initiative with the City of Arcadia to design, permit, and certify the development of a parking lot, stormwater management system, and supporting utility infrastructure for a historic building that has been retrofitted into a YMCA facility.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Giovanni Arriaga, EI	**Engineering / CADD Support**	3	3

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
BS, Civil Engineering, Florida Gulf Coast University, 2024	Engineer Intern, Florida # 1100027909

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Mr. Arriaga's experience includes working on county and city projects involving sidewalk enhancements, road resurfacing, and other various roadway improvements. His experience with various procedures includes plans production, field reviews, and traffic studies. He is skilled in the utilization of Autodesk Civil 3D and Inventor, MATLAB knowledge, and Microsoft Office applications. As a licensed Engineer in Training, Mr. Arriaga works closely with professional engineers to assist in designing engineering projects, performing calculations, preparing technical reports, and drafting site plans. He is also skilled in ArcGIS Pro and prepared planning GIS exhibits used to guide the design process. In 2024, Mr. Arriaga passed the Principles and Practice of Engineering Exam and will become a licensed Engineer upon completion of his time requirement.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lehigh Acres Municipal Services Improvement District (LA-MSID) General Engineering Services / District Engineer, Lee and Hendry Counties, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Engineer Intern assisting with various tasks on projects under this contract. AIM has held the contract for more than 20 years and is responsible for providing professional engineering services to assist LA-MSID with the maintenance of their drainage system infrastructure that includes 100-square-miles of canals, weirs, ditches, and drainage piping. Services include making day-to-day engineering decisions, providing watershed planning, designing capital improvements, inspecting construction, directing major maintenance operations, and advising the Board of Commissioners on various engineering matters.

b.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Boca Grande Tennis & Pickleball Courts Renovation, Boca Grande, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Engineer Intern. AIM is providing design, permitting, survey, SUE, post-design, and construction phase services for the new construction and renovation of facilities at Wheeler Road Community Park in Boca Grande. The park now has two existing tennis courts, a restroom, chain-link fencing, and lighting. The project includes reconstructing the existing tennis courts, constructing four new pickleball courts to the south of the property, new parking, a chain-link fence, sidewalks, addition of a prefabricated shade structure, a larger restroom, and a 6'-wide concrete path along the Boca Grande Dog Park fenced area.

c.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
E-911 Call Center Site Renovation, Fort Myers, Florida	01/24	10/24

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

As an Engineer Intern, Mr. Arriaga assisted with pre-construction services, including 60% and 90% plans review, value engineering, and preparation of the GMP and final schedule, of the site work and parking lot associated with the addition of a consolidated E911 Communications Center being integrated into the County's existing Emergency Operations Center (EOC) complex. The construction scope included removal of existing structures, utilities, and vegetation; resurfacing and restriping of parking areas; addition and upgrading of accessible parking spaces; and installation of new signage, lighting, fencing, and gate systems. Landscaping enhancements included drought-resistant plants, improved drainage, and reshaped retentions to maximize stormwater volume. Additionally, non-traditional water quality measures, such as pervious pavers, were employed to improve onsite filtration and reduce contaminants in local waterways.

d.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Midtown Streetscape & Utility Replacement Project, Program Manager, Fort Myers, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Engineering Intern. AIM is providing the Program Management to develop an infrastructure plan "framework" for the City's Midtown area; the first phase of which is comprehensive Master Planning. AIM's construction company, AIM Construction Contracting, is overseeing multiple design firms that are completing the various infrastructure planning and typical ROW layout of the elements, including watermains, sanitary sewer lines, stormwater networks (drainage, storage, and treatment), and streetscape elements to be developed in a conceptual GIS format to guide the future design phases and provide consistency at phase junction lines.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Grant Fitcher, PSM	**Senior Surveyor & Mapper**	27	27

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
BS, Business Supervision & Management, Florida Southwestern State College, 2022	Professional Surveyor & Mapper, Florida # 7453

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Mr. Fichter is Vice President and Manager of AIM's Surveying and Mapping Division. He is a highly experienced Contract and Project Manager with a depth of experience that reaches every level of the organization, including raw field data collection and designating and locating work to reduction, processing, calculations, and drafting work in the process of final deliverable production, as well as QA of all field and office data. His experience and proficiency in the science of SUE makes AIM a premier service provider throughout the state. His expertise includes Advanced Utility Locating and SUE locating and marking, utilization of approved methods such as GPR, electromagnetic locating devices, and vacuum excavation equipment. He has worked on hundreds of transportation design, design build, and construction projects for federal, state, and local governments as well as hundreds of private industry clients.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lehigh Acres Municipal Services Improvement District (LA-MSID) General Engineering Services / District Engineer, Lee and Hendry Counties, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Lead Project Surveyor. AIM has held the contract for more than 20 years and is responsible for providing professional engineering services to assist LA-MSID with the maintenance of their drainage system infrastructure that includes 100-square-miles of canals, weirs, ditches, and drainage piping. Services include making day-to-day engineering decisions, providing watershed planning, designing capital improvements, inspecting construction, directing major maintenance operations, and advising the Board of of Commissioners on various engineering matters.

b.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lee County Electric Cooperative – Subsurface Utility Exploration (SUE) Contract, Lee County, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Contract Manager / Surveyor. Under this contract, AIM conducts non-invasive subsurface exploration 'soft-dig' boreholes, including field staking and markings, backfilling and recording per FDOT standards, at proposed pole locations on an as-needed basis for potential LCEC infrastructure upgrades and/or new facilities construction. The scope of work for tasks under the contract includes obtaining necessary permits; protecting existing facilities/dwellings from damage; placing and confirming pole stake locations; and identifying each facility found.

c.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Miscellaneous Surveying & Mapping Services Contract, Lee County, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Contract Manager for this continuing services contract. Tasks involved surveys such as as-built, boundary, construction layout, control, hydrographic, mean high water line, quantity, record, specific or special purpose, topographic, wetland jurisdiction line, legal descriptions and parcel sketches, R/W, and map preparation. Projects included the following: Wild Turkey Strand High-Water Level Survey; Daniels Parkway & Gateway Boulevard Design & Topographic Survey; Summerlin Road & Cypress Lake Drive Design & Topographic Survey; Del Prado Boulevard & Hancock Bridge Parkway Design & Topographic Survey; 10-Mile Canal/Mullock Creek Bathymetric Survey; Big Carlos Pass Bridge Scour – Hurricane Irma Bathymetric Survey.

d.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Wastewater Basin Program (Basin 101) Utility Replacement, Naples, Florida	10/16	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

AIM provided support for the design of new sanitary sewer force mains, gravity mains, lift stations, as well as drainage improvements and potable water design. The scope included two miles of topographic design survey, including cross sections every 100' as well as collecting all above ground features, driveways, drainage structures, fences and overhead utilities. The scope also required AIM to define and depict the right-of-way, establish project control for the survey through construction as well as perform Level A and Level B SUE services identifying the existing underground utilities throughout the project.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Lee Flynn, PE	**CEI / Construction Manager**	25	25

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
BS, Agricultural & Biological Engineering, University of Florida, 2000	Professional Engineer, Florida #63907

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Mr. Flynn serves AIM as Vice President / Principal of AIM and is the manager of our CEI group. His current role involves oversight of numerous CEI and Construction projects and contracts, and his background includes providing value engineering, post design services, design support for roadway projects and contracts, and managing intricate water resource and land development projects. His experience includes managing projects of all types and sizes, including large task-work-based contracts for FDOT and municipalities and federally funded contracts and projects. Prior to his role leading the CEI Group, Mr. Flynn managed AIM's Civil Engineering Design Group, responsible for a substantial list of public works and infrastructure projects, including design, permitting, and construction management. He also provided post-design services, leadership for VE, and design support for both Roadway and CMAR contracts.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lehigh Acres Municipal Services Improvement District (LA-MSID) General Engineering Services / District Engineer, Lee and Hendry Counties, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Technical Advisor / Former Contract Manager. AIM has held the contract for more than 20 years and is responsible for providing professional engineering services to assist LA-MSID with the maintenance of their drainage system infrastructure that includes 100-square-miles of canals, weirs, ditches, and drainage piping. Services include making day-to-day engineering decisions, providing watershed planning, designing capital improvements, inspecting construction, directing major maintenance operations, and advising the Board of of Commissioners on various engineering matters.

b.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Construction Engineering & Inspection (CEI) Services for Local Agency Program (LAP) Funded Projects, Collier County, Florida	10/20	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Principal / Contract Manager. Under this contract, AIM provided CEI and Contract Compliance services on various projects. Services were provided under the Florida Department of Transportation's (FDOT) manuals and procedures; specifically in the areas of roadway CEI, construction materials inspection, and minor bridge and miscellaneous structures CEI. Tasks on these projects included intersection improvements, sidewalks, and pedestrian pathways. AIM also monitored the Contractor's and Subcontractor's performance for compliance with all requirements of the Equal Employment Opportunity (EEO), Affirmative Action (AA), Disadvantaged Business Enterprise (DBE), and federal Wage Rate Provisions required by the FHWA 1273 Required Contract Provisions Federal-Aid Construction Contracts and Florida Statutes. Nine tasks were completed under the contract, with a combined construction amount of $4.2M.

c.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Golden Gate City Transmission WM Improvements CEI, Naples, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Principal. This project, with two concurrent phases, is for the installation of new transmission water mains (WM) within the Collier County Water Sewer District to enhance potable water service for Golden Gate City (GGC) customers. Phase I includes 24" and 30" mains from Collier Boulevard to Santa Barbara Boulevard/Radio Road, along with a new force main (FM) through the GGC golf course to support future developments. Phase II involves 16" and 12" transmission mains near Santa Barbara Boulevard, Green Boulevard, and 48th Street SW, with both phases including selective stormwater pipe and structure replacements.

d.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lee County Municipal Service Benefit Unit Projects Consulting Engineer, Lee County, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Principal for two consecutive terms on this contract for Lee County Municipal Service Benefit Unit. AIM serves as District Engineer for projects that include retrofitting older neighborhoods with new water and sewer systems, new roads, and drainage facilities to mitigate flooding hazards and preparation of parcel maps with legal descriptions and sketches for easements and right-of-way stakes. Projects have included San Carlos Drive Improvements – Design & Construction Services; Emily Lane Water and Sewer Systems Replacement – Design, Permitting, & Construction Services; Airport Woods Commerce Center Water Treatment Plant – Planning, Design, Survey; Homestead Road Roadway & Drainage Improvements – Design, Survey, & Construction Services.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Chris Salicco	**Senior Environmental Scientist**	20	2.5

15. FIRM NAME AND LOCATION (*City and State*)
AIM Engineering & Surveying, Inc., Fort Myers, Florida

16. EDUCATION (*Degree and Specialization*)	17. CURRENT PROFESSIONAL REGISTRATION (*State and Discipline*)
BA, Environmental Science & Policy, University of South Florida, 2004	FFWCC Authorized Gopher Tortoise Agent (GTA-21-00056) Inspector Certification, NHI Highway Traffic Noise (NHI 142051)

18. OTHER PROFESSIONAL QUALIFICATIONS (*Publications, Organizations, Training, Awards, etc.*)

Mr. Salicco has 20 years of environmental and project development and environmental (PD&E) experience. He has provided technical support, field surveys, and document preparation for numerous PD&E studies, ranging from wetlands and wildlife to contamination, traffic noise, and air pollution. He has permitted numerous transportation and other projects throughout Florida with the US Army Corps of Engineers, water management districts, Department of Environmental Protection, and local government agencies. His experience also includes wildlife surveys, Uniform Mitigation Assessment Method and Wetland Rapid Assessment Procedure assessments, interpretations of state rules and statues, noise studies, contamination screenings, and computer programs such as ArcMap GIS.

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Environmental Consulting Contract (Permitting, Mitigation, & Monitoring), Lee County, Florida	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Contract Manager / Senior Environmental Scientist. This contract involves providing miscellaneous environmental task assignments on an as-needed basis. Services include environmental impact surveys and assessments, mitigation design and implementation, preparation of cost estimates, environmental permitting with local, state, and federal permitting agencies, permit compliance and monitoring, coastal planning and engineering, review and development of environmental stewardship plans, hydrological studies and restoration plans, and other environmental services that may be needed by the county.

b.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Districtwide Miscellaneous PD&E Consultant Services, FDOT District Three	Ongoing	N/A

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Senior Environmental Scientist / Quality Control. This contract provides miscellaneous environmental support services for projects within District Three's five-year work program and range from environmental reviews, reevaluations, commitment monitoring, document reviews, wetland delineation and evaluations, cultural resources, navigation studies, air and noise studies, mitigation plans/banks, wildlife and habitat studies, and Section 106 and Section 4(f) studies. Task work orders under this contract included 21 Type 1 categorical exclusions, 50 programmatic categorical exclusions, 28 non-major state actions, 38 reevaluations, as well as additional documentation and special studies.

c.

(1) TITLE AND LOCATION (*City and State*)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Lehigh Acres Municipal Services Improvement District (LA-MSID) General Engineering Contract, Lee & Hendry Counties, Florida	Ongoing	Per TWO

(3) BRIEF DESCRIPTION (*Brief scope size, cost, etc.*) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Environmental Task Lead providing environmental and permitting support for professional engineering consulting services to assist LA-MSID, a Florida Statues 298 Special District created in 1958 to build, operate, and maintain drainage facilities in eastern Lee County and western Hendry County to facilitate land development, with the maintenance of their drainage system infrastructure that includes 100-square-miles of canals, weirs, ditches, and drainage piping. Responsibilities include making day-today engineering decisions, providing watershed planning, designing capital improvements, inspecting construction, directing major maintenance operations, and advising the Board of Commissioners on various engineering matters. TWOs vary from $5K to $400K with projects that include:Scope development and negotiation support for D7 PD&E studies

- Caloosahatchee River & Estuary Storage & Treatment (CREST) – Gopher Tortoise Relocation
- Frank-Mann Preserve / GS-10 Hydrologic Restoration – PD&E Studies
- Rehydration of Bedman (Creek) Utilizing Storage & Treatment (ROBUST) – Design Services / PD&E

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (*Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.*)	20. EXAMPLE PROJECT KEY NUMBER
	1

21. TITLE AND LOCATION: *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
General Engineering Services / District Engineer, Lee & Hendry Counties, Florida	Ongoing	Per TWO

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Lehigh Acres Municipal Services Improvement District (LA-MSID)	Mike Cook, Assistant District Manager	239.368.0044 ext. 16 (O) mcook@la-msid.com

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

AIM Engineering & Surveying, Inc. (AIM) serves as the District Engineer providing professional engineering consulting services to assist LA-MSID, a Florida Statues 298 Special District created in 1958 to build, operate, and maintain drainage facilities in eastern Lee County and western Hendry County to facilitate land development, with the maintenance of their drainage system infrastructure that includes 100-square-miles of canals, weirs, ditches, and drainage piping. Responsibilities include making day-to-day engineering decisions, providing watershed planning, designing capital improvements, inspecting construction, directing major maintenance operations, and advising the Board on various engineering matters. TWOs vary from $5K to $400K with recent projects that include:

- **Caloosahatchee River & Estuary Storage & Treatment (CREST).** AIM provided civil engineering services that included the development of preliminary concept plans, design plans, surveying, geotechnical investigation, environmental assessments, Caracara species mitigation, water management analysis, hydraulic modeling, nutrient load reduction analysis, permitting, and application/acquisition of grant funds for a 104.5(+) acre stormwater storage reservoir and water quality treatment facility in East Lee County/West Hendry County.
  2024 American Council of Engineering Companies of Florida's (ACEC-FL) Southwest Branch Sustainable Project of the Year.
- **Weir S-H-2 Replacement.** This Emergency Watershed Protection (EWP) project involved the replacement of LA-MSID-owned water control structure S-H-2. Due to storm events related to Hurricane Irma in September 2017, the existing structure collapsed. AIM provided professional services, including preliminary design and design, permitting, and construction phase assistance for the emergency replacement. A National Resources Conservation Service (NRCS) grant helped fund most of the project.
- **West Marsh Preserve Design, Permitting, & Construction Phase Services.** AIM completed the evaluation, design, permitting, surveying, and construction phase services for this multi-phase project creating treatment wetlands to improve water quality and provide stormwater storage in the LA-MSID Able Canal (Orange River) basin. The 206-acre site, now called the West Marsh Preserve, functions as both a reservoir and treatment wetland adjacent to the 578-acre Harns Marsh Water Management Area. The project enhanced flood control and water quality while adding lakes, expanding wildlife habitats, and supporting recreational uses like bird watching, hiking, and non-motorized boating. AIM's scope included topographic surveying, a Digital Terrain Model, environmental assessment, and hydraulic modeling to optimize operations and control structures, and managed permitting with SFWMD, USFWS, and USACE and oversaw construction in three phases coordinated with FDOT and grant funding.
  2023 ACEC-FL Engineering Excellence Honor Award Winner
- **Buckingham Park Bank Stabilization NRCS.** AIM was responsible for surveying, design, and construction inspection of this Natural Resources Conservation Service (NRCS) Hurricane Irma grant funded project in an accelerated time frame. As a result of Hurricane Irma, the bank of Canal 46-16- 2 (Colonel Canal) had been washed out at select locations. Canal flow was affected by sediment from the embankment slope sloughing into the canal and thereby also posing a flooding risk to adjacent houses. To remedy this situation the sedimentation in the bottom of the canal was removed, the canal banks were re-graded and stabilized, and 2,400LF of Flexamat, non-woven filter fabric and rip rap were placed on the locations of the canal with the erosion issue (west and south embankment) to prevent sedimentation from occurring again and reducing potential flooding.
- **Critical Culvert Replacement, Phase I.** This project was for the first phase of critical culvert replacements, which are critical to the functioning of the overall LA-MSID master surface water management system. The Corrugated Metal Culverts (CMPs) were initially installed under roadways where roads crossed drainage canals. Over time, the CMPs deteriorated, and several pipes caused the road crossing above to collapse. The CMPs were replaced with either reinforced concrete pipes or concrete box culverts and the road crossings were modified to improve drainage into the nearby canal. The project included coordination with the Lee County DOT since the road segments were part of the County's public roadway infrastructure.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	AIM Engineering & Surveying, Inc.	Fort Myers, Florida	Project Management; Preliminary Engineering; Final Design; Contract Documents; Bidding Assistance; Construction Phase EOR Services; Permitting
b.	AIM Engineering & Surveying, Inc.	Tampa, Florida	Structural, Environmental / Permitting

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (*Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.*)	20. EXAMPLE PROJECT KEY NUMBER
	2

21. TITLE AND LOCATION: *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Jordan Marsh Water Quality Treatment Park, Sanibel, Florida	03/19	03/19

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
City of Sanibel 800 Dunlop Road Sanibel, FL 33957	Holly Milbrandt Natural Resources Director	239.472.3700 ext. 377 holly.milbrandt@mysanibel.com

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

The Sanibel River Basin is an impaired waterbody that has been impacted over the years from residential, commercial, and agricultural development. To combat these adverse impacts and protect Sanibel's water quality and natural ecosystem, restoration efforts were developed and several initiatives were put into action. One of these initiatives was to collect and treat water within the often-stagnant Sanibel River. This was accomplished through the development of a water quality treatment park, known as Jordan Marsh, which is a multi-purpose surface water treatment facility within conservation lands adjacent to an existing drainage outfall.

AIM Engineering & Surveying, Inc. (AIM) provided the design, engineering, and permitting of the Jordan Marsh Water Quality Treatment Park that is located on a portion of 14.5 acres of public and private conservation land near the intersection of Periwinkle Way and Casa Ybel Road on Sanibel Island, adjacent to the Sanibel River. Successful permit acquisition was accomplished through coordination with USACE and FDEP. Public outreach and collaboration with the Sanibel-Captiva Conservation Foundation stakeholders proved to be a vital component. An inflow pumping station, discharge weir control structure, and telemetric features were incorporated into the design which allows for remote measurement tracking of the system's stage, velocity, and flow statistics. To assess the hydraulics and water quality for the park, the EPA SWMM model was used and constructed with 67 links and nodes to represent the treatment system consisting of varying depths and roughness. Inflow rates, as well as Total Nitrogen and Total Phosphorus nutrient loads were assessed. Inflow rates were routed through the system in SWMM hydraulics. Total Nitrogen and Total Phosphorus were simulated in the SWMM water quality routine using a first order decay process.

AIM's design of the Jordan Marsh Water Quality Treatment Park maximizes opportunities for water quality improvement and storage and provides expanded recreational opportunities and improved habitat for the enjoyment of residents and visitors of Sanibel Island. Additional project elements included environmental assessment, topographic survey, and post-design services. Two change orders were later added to the scope, one for legal sketch and description for a proposed easement and legal sketch and description for an as-built intake pipe.

Total AIM Fee: $167,731
Construction Amount: $638,001.83

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	AIM Engineering & Surveying, Inc.	Fort Myers, Florida	Project Management; Preliminary Engineering; Final Design; Contract Documents; Bidding Assistance; Construction Phase EOR Services; Permitting
b.	AIM Engineering & Surveying, Inc.	Tampa, Florida	Structural, Environmental / Permitting

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (*Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.*)	20. EXAMPLE PROJECT KEY NUMBER
	3

21. TITLE AND LOCATION: *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Hendry County Municipal Services Benefit Units, Hendry County, Florida	Ongoing	Per TWO

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Hendry County 99 East Cowboy Way LaBelle, Florida 33935	Shane Parker, PE County Engineer	863-675-5222 863-674-2941 (fax) sparker@hendryfla.net

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

Hendry County created several Municipal Service Benefit Units (MSBUs) for communities throughout the county to create a funding mechanism to address specific infrastructure needs, including road-ways, lighting and stormwater projects. Below is a list of a couple example projects **AIM Engineering & Surveying, Inc. (AIM)** performed for the various MSBUs in Hendry County.

- **Roy Brown Canal & Ivan Outfall Drainage Improvements, North LaBelle MSBU.** This project aimed to evaluate, recommend, and design improvements to address flooding issues within the North LaBelle Municipal Service Benefit Unit (NLMSBU), which drains into the Roy Brown Canal. Makeshift roadway crossings with undersized conveyance pipes had caused blockages and high-water stages during major storm events, leading to street and property flooding. AIM conducted surveying, data collection, watershed delineation, and developed a detailed Ad-ICPR hydraulic model to analyze existing conditions and test improvement scenarios. The analysis recommended replacing two road/canal crossings with properly sized pipes and adding stormwater storage to reduce peak flood stages and improve the Roy Brown Canal's backwater profile. AIM delivered a Hydraulic Analysis Report, prepared detailed design plans, and secured a joint SFWMD/USACE Environmental Resource Permit (ERP) for the improvements. The engineering fee was $132K.
- **Wheeler Road Improvements, Phase I, Hendry MSBU.** AIM provided design, survey, permitting and construction CEI services for the 2.6-mile improvement of Wheeler Road in north Wheeler Estates, including the extension from 23rd Terrace to the Townsend Canal Grade and reconstruction of existing unpaved segments from 10th Place to 13th Place. The design scope included permitting, surveying, Subsurface Utility Engineering (SUE), geotechnical investigations, listed species surveys, FLUCCS mapping, utility coordination, and preparation of construction plans, EOPC, and bid documents. AIM coordinated with SFWMD, LAMSID, and other agencies to secure permits and ensure environmental compliance. Construction activities included limerock base stabilization, Superpave asphalt paving, drainage improvements, slope regrading, signage and pavement markings, turf establishment, and maintenance of traffic. Through comprehensive oversight from design through final inspection, AIM delivered a safe, durable, and well-drained roadway that enhances mobility and infrastructure for the surrounding community. The engineering fee was $213K; the CEI fee was $363K; and the construction cost was $2.5M.
- **Flood Mitigation Study, Felda MSBU.** AIM as a consultant to Hendry County, has performed various studies to look at ways to address historical flooding issues within the Felda MSBU service area, including obtaining a positive legal outfall for the Felda MSBU service area. Significant data has been collected, various alternatives have been reviewed, and easements for drainage alignment have been considered. As such, Hendry County recently applied for and received a grant from the Florida Department of Environmental Protection (FDEP) to perform a thorough study of the Felda MSBU service area to formally address the drainage issues and outline a plan for implementation. Hydrologic and hydraulic models to simulate the existing stormwater system and proposed improvements were developed along with a Geographic Information System (GIS) mapped inventory of facilities. The water quality review incorporated the National Pollution Discharge Eliminate System (NPDES) methodology for expected pollutant loadings from existing or proposed land uses. AIM staff provided professional services which included attending kick-off and progress meetings, data collection, data inventory preparation and maintenance, watershed/basin delineation, and overall assistance with the stormwater master plan development. Under a separate contract, AIM was later asked to design several of the needed capital improvement projects identified in this study. The engineering fee for the study was $101K.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	AIM Engineering & Surveying, Inc.	Fort Myers, Florida	Project Management; Final Design; Permitting; Preliminary Engineering; Contract Documents; Bidding Assistance; Construction Phase EOR Services
b.	AIM Engineering & Surveying, Inc.	Tampa, Florida	Structural, Environmental / Permitting

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (*Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.*)	20. EXAMPLE PROJECT KEY NUMBER 4

21. TITLE AND LOCATION: *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Gateway Services Community Development District, Fort Myers, Florida	Ongoing	Per TWO

23. PROJECT OWNER'S INFORMATION		
a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Gateway Services CDD 11922 Fairway Lakes Dr Ste 1, Fort Myers, FL 33913	Fred Mittl, PE Senior Project Manager Tetra Tech	239.390.1467 fred.mittl@tetratech.com

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

AIM Engineering & Surveying, Inc. (AIM) has provided design, permitting, surveying, mapping, subsurface utility exploration (SUE), and construction phase services for multiple projects under the Gateway CDD between the years 2015 and 2023. These projects are under various phases of construction. Example projects include:

- **Gateway Irrigation Main:** AIM performed a topographic survey of proposed 1.83-mile force main and irrigation main route. Perform right of way and easement mapping to support the design. Perform sufficient deed research and perform location surveys to recover existing boundaries and right-of-way corners. Perform Subsurface Utility Engineering Quality Level B (designating) and Quality Level A (locating) services to depict existing underground utilities and perform test hole locations and necessary to address utility conflicts.
- **Gateway Services District Lake Bank Restorations:** AIM provided construction survey services to support bank restoration on several lakes within the Gateway community in Lee County, FL. Services included providing on-site horizontal and vertical control, staking bank restoration areas, and performed as-built survey on completed restoration areas, and as-built survey maps.
- **Gateway Utilities at Griffin Drive & Gateway Boulevard:** AIM provided subsurface utility exploration (SUE) Quality Level B (designating) services to target specific underground utilities to determine the horizontal location and type of utility in the project area. AIM also provided SUE Quality A (locating/test holes) to expose underground utilities using vacuum extraction to gather the size, type, material, and depth of existing facilities at conflict points requested by the engineer of record. AIM crews surveyed the horizontal and vertical positions of the discovered utilities to project datums. Deliverables to the client included photographs, CADD files, and a Summary of Verified Utilities spreadsheet document the locations.
- **Hawthorne Well PW-7:** AIM provided services in support of the design for a new supply well (PW-7), deemed necessary by hydraulic modeling, to supplement unrestricted public access quality effluent from the Gateway Wastewater Treatment Plant. AIM's services included design survey; topographic survey 25' in width at 200-300' intervals, including locations above ground visible utilities, valve boxes, cable markers, service boxes, drainage structures, building, culvert pipes; right-of-way survey; SUE Quality Level B locating, by use of GPR and Electromagnetic pipe and cable locating devises, and six (6) SUE Quality Level A test holes.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	AIM Engineering & Surveying, Inc.	Fort Myers, Florida	Surveying & Mapping, Subsurface Utility Engineering (SUE)
b.	(1) FIRM NAME .	(2) FIRM LOCATION *(City and State)*	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (*Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.*)	20. EXAMPLE PROJECT KEY NUMBER
	5

21. TITLE AND LOCATION: *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Lee County Municipal Services Taxing/Benefits Units (MSTBU), Lee County, Florida	Ongoing	Per TWO

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Lee County Utilities & MSBU 1500 Monroe Street Fort Myers, Florida 33901	Current Manager: Joshua Malo Lee County MSTBU Manager	239-533-2308 JMalo@leegov.com

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

AIM Engineering & Surveying, Inc. (AIM) served three consecutive terms as Lee County's Engineering Consultant for all Lee County Municipal Service Benefit Unit (MSBU) projects. AIM was reselected for multiple terms. Some of the projects under this contract included retrofitting older neighborhoods with new water and sewer systems, preparing parcel maps with legal descriptions and sketches for easements, performing drainage studies, and preparing improvement plans to relieve flooding problems in several Lee County neighborhoods. The AIM Team conducted neighborhood meetings with the public and coordinated the design improvements with other projects in the area. All tasks assigned were completed on time and within budget. Brief descriptions of some of the projects conducted under the contract are listed below:

- **Coconut Road Watermain Project, Bonita Springs, Florida.** The scope of work involved professional engineering and surveying services, including preparation of construction plans, contract document specifications for bidding, and post-design services for installation of a water main extension on Coconut Road between San Carlos Boulevard and Hickory Road. Prior to the start of the design phase, AIM's surveyors collected and mapped topographic data, established the vertical and horizontal controls for the area, and defined right-of-way and easement limits. SUE crews performed vacuum excavations to locate existing main stub-outs at each end of the project, as well as an existing valve. AIM's engineering team prepared construction plans, bid quantities, and construction documents, and assisted the County in selecting the winning contractor. The engineering fee was $42K.
- **McGregor Village Utility Improvements, Fort Myers, Florida.** This project included planning, surveying, design, permitting, and construction services for a new sanitary gravity sewer system and pumping station within the condo boundary. The new systems were connected to an existing Lee County 16-inch force main on Lake McGregor Drive with a new force main. Following the completion of the new utilities improvements, the existing septic system was removed and properly disposed. The newly constructed facilities were turned over to Lee County for ownership, operation and maintenance. The engineering fee for this project was $45K and the construction cost was $215K.
- **Airport Woods Commerce Center Utility Improvements, Fort Myers, Florida.** The scope of the project included the removal and disposal of the existing wastewater treatment plant, repair and upgrade to the existing sewage collection system, upgrading the existing pump station, and providing a new sanitary sewer force main. Our tasks encompassed planning, surveying, design, and evaluating possible recommendations for repair, permitting and construction services. The sanitary sewer force main extended from the wastewater treatment plant site, easterly along the Airport Woods Entrance Road to Treeline Avenue and connecting to the existing City of Fort Myers owned force main located in the Treeline Avenue right-of-way. The newly constructed facilities were turned over to Lee County for ownership, operation and maintenance. The engineering fee for this project was $95K and the construction cost was $488K.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	AIM Engineering & Surveying, Inc.	Fort Myers, Florida	Project Management; Preliminary Engineering; Final Design; Contract Documents; Bidding Assistance; Construction Phase EOR Services; Permitting
b.	AIM Engineering & Surveying, Inc.	Tampa, Florida	Structural, Environmental / Permitting

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (*Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.*)	20. EXAMPLE PROJECT KEY NUMBER
	6

21. TITLE AND LOCATION: *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Tsala-Apopka Golf Course Structure Modification, Inverness, Florida	02/25	02/25

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
SWFWMD 2379 Broad Street Brooksville, FL 34604	Jillian Berbakov, PE Design & Construction Manager	352.269.5084 Jillian.Berbakov@swfwmd.state.fl.us

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

Under a general services on-call contract with the Southwest Florida Water Management District (SWFWMD), **AIM Engineering & Surveying, Inc. (AIM)** provided design, permitting, and survey for the modification of an existing operable WCS in Inverness, Florida. Modifying the Golf Course Structure improves flow into the Inverness Pool and assists with flood protection within the Tsala Apopka Chain-of-Lakes. SWFWMD evaluated various scenarios to guide the scope of work, and the AIM team was able to verify the findings and recommendations in the report so that the District was confident with the design approach. Modeling efforts indicated that doubling the existing flow cross-section and implementing two 8' gate openings was favorable in achieving the desired discharge rates.

AIM worked directly with SWFWMD in the modification of their SCADA system to ensure integration and comparability of the new automated components. This project did not have permanent maintenance access; therefore, providing surveying services to obtain rights-of-way/ownership/easements was essential. Emphasis is also noted that this structure is very close in proximity to an aging bridge. The proposed design necessitated the incorporation of unique retaining wall design and slope stabilization systems. Selecting a design team that has proven experience replacing a weir proximity to existing roadway/bridge infrastructure is critical.

AIM services included stakeholder coordination and meetings, survey, including topographic and right-of-way mapping, preliminary design assessment of existing structure for retrofit capability, 30%, 60%, and final design plans for weir modification and redesign, structural design for retrofit, FDEP permitting exemption, and bidding services. The design incorporated mechanized gate actuation, sensing for gate status and water levels upstream and downstream, remote monitoring, remote operation, a catwalk for maintenance access, handrails for safety, chain link fencing with gates for security, slope stabilization systems and improved maintenance access route and parking. Additional elements provided by subconsultants included electrical design for weir components and remote access; underwater inspection of the weir; and geotechnical investigation for soil borings and bank stabilization analysis. AIM completed the design, survey, permitting, and post-design phases in June 2019; and provided construction phase services, with construction completed in February 2025.

Total AIM Fee: $119,967.63
Construction Amount: $605,504.39

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	AIM Engineering & Surveying, Inc.	Fort Myers, Florida	Project Management, Civil Engineering, Environmental/ Permitting, Construction Management, Surveying
b.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (*Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.*)	20. EXAMPLE PROJECT KEY NUMBER
	7

1. TITLE AND LOCATION: *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
YMCA Road Water Main Abandonment & Replacement, Naples, Florida	06/23	06/23

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Collier County Public Utilities 3339 Tamiami Trail E, Suite 303 Naples, Florida 34112	Benjamin Bullert, PE Principal Project Manager	239.877.6339 (cell) Benjamin.Bullert@colliercountyfl.gov

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

Under a Professional Services Library: Architecture & Engineering Contract, **AIM Engineering & Surveying, Inc. (AIM)** provided professional engineering services for this emergency replacement project. The original contract called for the completion of engineering design and plans to abandon/remove an existing asbestos cement WM on YMCA Road from Airport Pulling Road to the YMCA entrance, in Naples. The existing WM crossed under Airport Pulling Road and connected to a 16" cast iron main along the westerly right-of-way line. Late in the design phase, the existing WM under the northbound lane of Airport Pulling Road failed, and emergency work was completed to abandon the 6" waterline underneath the roadway. This emergency prompted the need to complete the project in two phases.

AIM's Phase I services included expedited design deviation, bidding, and construction phase services in coordination with the emergency repair for the grouting and in-place abandonment of approximately 150 LF of failed existing WM. Phase II included survey, SUE, engineering design and plans, permitting, and bidding services for improvements, including removal and disposal of approximately 700 LF of asbestos cement WM, grouting of approximately 300 LF of existing 8" asbestos cement WM, and installation of approximately 1100 LF of new 8" WM piping. Phase II also involved all associated appurtenances of fire hydrants, gate valves, air release valves, permanent sample points, and the relocation/reconnection of water services.

SUE services included performing utility designates on telecom lines near the proposed water main improvements to determine where conflicts exist. The team also performed vacuum locates on existing sanitary sewer lines at the locations where there was a potential for the proposed water main to cross sanitary lines. The information was subsequently tied horizontally and vertically with survey data and provided to the County in CAD deliverable and summary spreadsheet format.

Total AIM Fee: $62,348.80
Construction Amount: $478,254.00

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	AIM Engineering & Surveying, Inc.	Fort Myers, Florida	Project Management, Civil Engineering, Environmental/ Permitting, Construction Management, Surveying
b.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS											
26. NAMES OF KEY PERSONNEL (*From Section E, Block 12*)	**27. ROLE IN THIS CONTRACT** (*From Section E, Block 13*)	**28. EXAMPLE PROJECTS LISTED IN SECTION F** *(Fill in "Examples Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)*									
		1	2	3	4	5	6	7	8	9	10
Jerron Hull, PE	Principal & CEO, Principal	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐
Jamie W. Rivera, PE, CFM	Contract Manager	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐
Daniel Schroeder, PE, MSE	Senior Project Engineer	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐
Steven Neff, PE	Senior Project Engineer / QC	☒	☒	☒	☐	☒	☒	☒	☐	☐	☐
Max Rivera, EI	Engineering / CADD Support	☒	☐	☐	☐	☐	☒	☐	☐	☐	☐
Giovanni Arriaga, EI	Engineering / CADD Support	☒	☐	☒	☐	☐	☒	☐	☐	☐	☐
Grant Fichter, PSM	Senior Surveyor & Mapper	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐
Lee Flynn, PE	CEI / Construction Manager	☒	☒	☒	☐	☒	☒	☒	☐	☐	☐
Chris Salicco	Sr. Environmental Scientist	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
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		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

29. EXAMPLE PROJECTS KEY

NUMBER	TITLE OF EXAMPLE PROJECT *(From Section F)*	NUMBER	TITLE OF EXAMPLE PROJECT *(From Section F)*
1	Lehigh Acres Municipal Services Improvement District (LA-MSID) General Engineering Services / District Engineer, Lee & Hendry Counties, Florida	6	Southwest Florida Water Management District (SWFWMD), Tsala-Apopka Golf Course Structure Modification, Inverness, Florida
2	Jordan Marsh Water Quality Treatment Park, Sanibel, Florida	7	YMCA Road Water Main Abandonment & Replacement, Naples, Florida
3	Hendry County MSBUs, Hendry County, Florida	8	
4	Gateway Services CDD, Fort Myers, Florida	9	
5	Lee County Municipal Services Taxing/Benefits Units (MSTBU), Lee County, Florida	10	

H. ADDITIONAL INFORMATION

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

Approach to Providing Engineering Services to CDDs

From our experience, we understand the scope may include tasks listed to the right. AIM has the capability and experience to address these typical CDD tasks. As the District's engineer, we will execute each assignment with quality and integrity and always represent the District's best interest.

PROPOSED SCOPE FOR ESTABLISHED CDDs

- Facilities Modifications
- GATSB 34
- Upgrades to Irrigation & Maintenance Facilities
- Modifications to SWMS
- Sidewalk / ADA Assessments
- Traffic Signage & Pavement Marking Surveys
- Pavement Condition Assessments
- Drainage Issue Resolution
- Pond & Wetland Inspections
- Road Resurfacing & Improvement Projects
- Establish Permit Critera Manual, should new phases of development be proposed within the District

AIM is confident in the strength and expertise of our leadership team, which is crucial to delivering exceptional project outcomes. We have assembled a team of highly qualified professionals with a wealth of experience, specialized skills, and a proven track record of meeting the highest quality standards. This team is uniquely equipped to handle the challenges of this contract, bringing both technical proficiency and innovative solutions to the table.

Our management approach is designed to provide the District with efficient, accessible, and capable services, all while implementing cost-saving measures. We offer a seamless point of contact and ensure that all team members assigned to this contract are readily available to meet project demands. Our approach is collaborative; we will collaborate closely with the Board of Supervisors and its subconsultants, creating a supportive and productive working environment.

Our Contract Manager, Jamie W. Rivera, PE, CFM, has nearly a decade of experience delivering engineering services to CDDs in Southwest Florida. Her expertise encompasses the entire lifecycle of CDD development, including establishment, construction, post-development reporting, and budget analysis. Her extensive background ensures a thorough understanding of the unique regulatory and operational needs of CDDs, allowing us to deliver services that enhance efficiency and compliance with reporting requirements.

By selecting AIM, the District will benefit from a focused leadership team that is well-versed in technical strategies tailored to CDD operations. Our services are designed to optimize processes, maximize value, and maintain high standards of quality. We emphasize a data-driven approach, leveraging technical expertise to address specific challenges faced by CDDs. Our commitment to excellence and attention to detail positions us as a strategic partner in achieving the District's objectives. We look forward to collaborating to ensure the successful realization of these initiatives.

Cost & Schedule Conscious Services

Our team has a diverse and successful history of providing consulting services to special districts, affording us the opportunity to remain abreast of the applicable laws and regulations that govern the Districts. In addition, we continually monitor the changes in the regulatory climate to seize every opportunity for our clients to meet rules and regulations while minimizing costs. AIM is conscious of the budgetary demands on the District and our approach is to identify every opportunity to provide the greatest value while maintaining the intent of the project scope. We have a long-standing reputation for completing our assigned projects on or ahead of schedule and within or below our clients' budgets.

Committed, Collaborative Team

We greatly value our reputation and are confident in our ability to deliver high standards of performance and quality that we have consistently provided to special districts and other public and private clients over the past

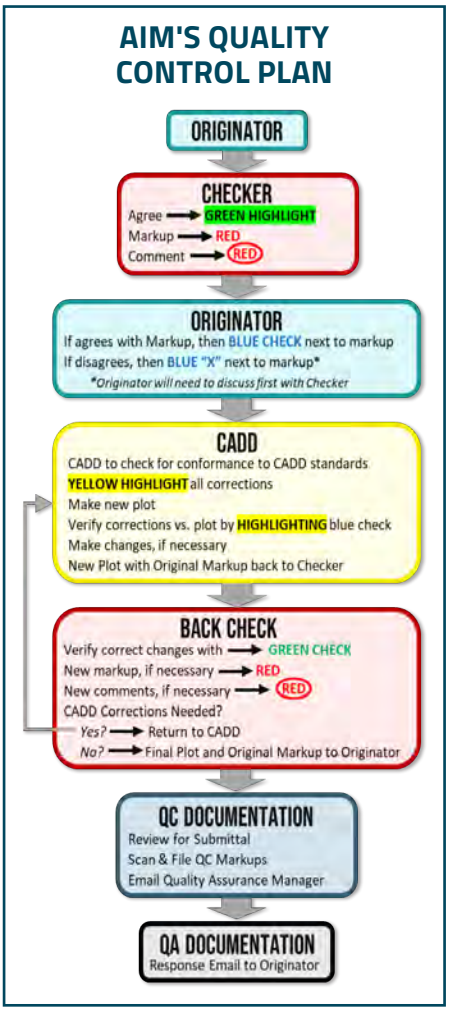
H. ADDITIONAL INFORMATION

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

45 years of business. We are committed to assembling a collaborative team by ensuring that we provide the appropriate and available staff for the duration of this contract, along with full certification of our products. AIM guarantees that we will be responsive and attentive to the District's needs and we are dedicated to maintaining and strengthening our valued partnership.

Strong QA / QC Procedures

AIM is dedicated to providing prompt response, high quality, and accurate, dependable services to not only meet but exceed the District's expectations. AIM's total quality approach means every member of the AIM team is responsible for the quality of every aspect of their work, from field reviews to document production. AIM utilizes a comprehensive Project Quality Control Plan (PQCP) from the outset through the final completion of many projects. The foundation of the PQCP is an extensive program of peer reviews performed by qualified personnel who are not directly involved in the completion of a particular task. All deliverables are subjected to an independent peer review and sufficient review time for each deliverable will be built into every project schedule. AIM also maintains an impressive in-house Quality Assurance team that conducts periodic reviews of projects in-progress. This service is provided to the District at no cost and assures that the highest standards of performance are maintained. We commit to continuously monitoring and evaluating the team's adherence to the processes, procedures, and standards, as outlined to the right.



Furthermore, AIM has provided constructability reviews that have reduced both construction costs and times on various types of projects. The purpose of the constructability reviews for construction plans and specifications is to identify possible construction problems. AIM's Construction Engineering and Inspection staff can work directly with our designers to develop plans that minimize potential challenges for the contractor. Bidability reviews will also be conducted on the construction contract documents. This review ensures that the plan will go through the bid process with minimal conflicts, ambiguities, inaccuracies, and/or deficiencies.

H. ADDITIONAL INFORMATION

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

COMPUTER SOFTWARE

- ACA Capture Pro
- Adobe Acrobat XI Professional
- Adobe Creative Cloud
- ArcGIS 10.4
- Ajera
- ASAD
- AutoCAD Civil 3D 2015
- Autodesk Civil Design/Civil 3D/Land 2015 Object Enabler/Survey/Vault/Storm & Sanitary Analysis
- AutoTurn 9.0.2
- Bentley MicroStation V8.11
- Descartes V8.11
- DHI MIKE SHE
- Citilabs Cube Voyager 6.4
- Citrix ICA Client
- CAiCE Visual Transportation
- ERDAS Imagine & Leica Photogrammetry Suite
- FDOT Citrix
- FDOT Construction Software 2009
- FDOT Infonet
- FDOT Laboratory Information Management System
- FDOT LOS (Level of Service) 2009
- FDOT SiteManager
- FDOT SS4
- Florida Department of Transportation Trends
- Foundation
- Geopak
- Google Earth Pro
- Haested Methods (Storm CAD, Water CAD, Sewer CAD)
- HECRAS
- HY8
- HyPACK 2015
- ICPR 3.10
- Lview
- MapInfo 12.0
- McTrans Highway Capacity Manual HCS
- Microsoft Office 2013
- Microsoft Project 2013
- Pix4D Mapper
- Primavera P6
- Sidra Intersection 6.1
- Synchro/SimTraffic 8
- TransSoft GuidSign 6.12
- Trimble GeoExplorer 2005
- Trimble TSCe
- WSPRO

FIELD EQUIPMENT

- Carlson Data Collector, Explorer II
- CST/Berger Level, Model M-156351
- Density Gauge (2)
- DJI Mavic 2 Pro Unmanned Aerial Vehicle (UAV)
- Electromagnetic Locator (10)
- Ground Penetrating Radar (3)
- Ground Penetrating Radar Unit (7)
- Husky Data Collector, Model FS-2
- Hydrolite XT
- Kubota Side by Side
- Leica Level, Models NA-2 & NA-28 (3)
- Leica P50 Terrestrial LiDAR Scanner
- Leica P40 Terrestrial LiDAR Scanner
- Leica SmartRover
- Leica Total Station, Various Models
- Mini Excavator JD 60G (1)
- Pegasus Mobile Mapping Station
- Pipehorn HL 800 Pipe & Cable Locators (2)
- Polaris ATV
- RAM VAX AX4000 vacuum truck with /air/hydro excavator (1)
- Raven Data Collector, Models CDPR & TDS
- Raven Locator, Model CDPD
- Schonstedt Locator, Models GA-52 & GA-52CX
- SenseFly eBee UAV
- Sonarmite BT
- Swamp Buggy
- Topcon Robotic Total Station, Model GPT-8205A
- Topcon Total Station, Model GPT-3005W (2)
- Track Skid Steer JD 325G (1)
- Troxler Density Gauge 26168 (3)
- Type B Pressure Meter
- Vacmaster 4000 vacuum truck w/air/hydro excavator (2)
- Vermeer/Vactron Vacuum System PMD550DT
- Wanco Arrow Board Trailor

GPS EQUIPMENT

- Leica DNA10 Digital Level (1)
- Leica Sprinter 100M Digital Level (1)
- Leica NA2 Automatic Levels (6)
- Leica NA28 Automatic Levels (2)
- Leica System 1200 SmartRover (GPS/GNSS) (6)
- Leica System SR530 Receivers (5)
- Trimble GeoXt Handheld Sub-Meter GPS (1)
- Leica Viva GS15 Units (2)

H. ADDITIONAL INFORMATION

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

PHOTOGRAPHIC EQUIPMENT

- GoPro360
- Canon A590IS Camera (2)
- Kodak Z1285 Digital Camera
- Pentax Optio E10
- Polaroid I534
- Sony DSC-W190 Camera
- Saltzman B9 Enlargers
- Sony HDR-SR11 High-Definition Video Camera
- RCA Video Camcorder
- Pentax 35mm Camera with 35/70 & 80/200 Lenses
- Bushnell Binoculars Trimble GeoXT w/TerraSync & GPS Analyst

COMMUNICATION

- Smart Phones & Tablets
- Motorola CP-200 & CT-250 Two Way Radios

COMPUTER HARDWARE

- Three Dual Xeon Dual Core Processor Windows 2008 R2 Servers with Active Directory Integration
- Multiple High-Powered Workstations with Intel i5 & i7 Processors running Windows 7 64-bit with Solid State Hard Drives for Modeling & AutoCAD
- Intranet with VPN Access
- Roaming Laptops with Broadband Cards
- Multiple DVD & CD Recorders
- Overland Storage Powerloader for Backups
- Two ARC Vaults for Tape Backup
- Off-Site Backup of Data in Remote Offices Using Distributed File Systems (Windows 2008 Server)
- HP MSA1500 SAN for Data Storage at Corporate Office
- Multiple HP MSA 20 SANs for Data Storage
- VPN Access to Mobile Field Crews
- Dedicate 64-bit Linux Mail Server
- Wide-Format Plotters

BIOLOGICAL SAMPLING GEAR

- 5M DBH Tapes
- PVC Quadrats (2m, 1m, 0.5m, 0.25m, & 0.16m)
- 2” Bucket Augers with 6’ Extension
- Botanical Field Presses
- Munsell Soil Charts
- Soil Probes

WATER SAMPLING EQUIPMENT

- YSI Model 44 DO Meter/Probe
- HACH 16800 Portable Turbidimeters
- HACH 9100 Field Turbidimeters
- Kimmerer Water Sampler
- Van Dorn Water Sampler
- Secchi Disk
- Refractometer
- LI 100 LiCor with 2II Light Sensor
- Backpack Herbicide Applicator
- Hand-Held Sale Refractometer with ATC

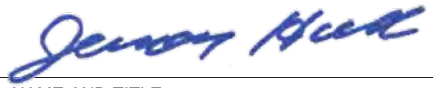
MISCELLANEOUS EQUIPMENT

- ¾ Ton Swamp Buggy
- 100-Meter Tapes
- 10cm x 10cm Quads
- 1-m2 Quad
- 25 ml Opaque Bottles
- Aquascopes
- Dual Regulator Hookah
- Full Range of Vehicles to Include 4-Wheel Drive Vehicles
- Kawasaki 220 4-Wheel ATV
- Safety equipment for all Vehicles & Personnel

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE



32. DATE

October 9, 2025

33. NAME AND TITLE

Jerron K. Hull, PE, President & CEO, Principal

ARCHITECT-ENGINEER QUALIFICATIONS

1. SOLICITATION NUMBER *(If any)*:

PART II - GENERAL QUALIFICATIONS

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

2a. FIRM (*or Branch Office*) NAME	AIM Engineering & Surveying, Inc.
2b. STREET	2161 Fowler Street, Suite 100
2c. CITY	Fort Myers
2d. STATE	Florida
2e. ZIP CODE	33901
3. YEAR ESTABLISHED	1980
4. UNIQUE ENTITY IDENTIFIER	QZAVL36DVE93
5. OWNERSHIP a. TYPE	Corporation
b. SMALL BUSINESS STATUS	N/A
6a. POINT OF CONTACT NAME AND TITLE	Jerron K. Hull, PE, President & CEO, Principal
6b. TELEPHONE NUMBER	239-332-4569
6c. EMAIL ADDRESS	jerron@aimengr.com
7. NAME OF FIRM *(If Block 2a is a Branch Office)*	

8a. FORMER FIRM NAME(S) *(If any)*	8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER

9. EMPLOYEES BY DISCIPLINE

a. Function Code	b. Discipline	c. Number of Employees (1) FIRM	c. Number of Employees (2) BRANCH
02	ADMINISTRATIVE	40	14
08	CADD TECHNICIAN	9	6
12	CIVIL ENGINEER	7	7
15	CONSTRUCTION INSPECTOR	22	6
16	CONSTRUCTION MANAGER	2	1
24	ENVIRONMENTAL SCIENTIST	3	0
38	LAND SURVEYOR	56	44
47	PLANNER: URBAN/REGIONAL	3	0
48	PROJECT MANAGER	6	8
60	TRANSPORTATION ENGINEER	27	3
	Other Employees		
	Total	175	89

10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS

a. Profile Code	b. Experience	c. Revenue Index Number *(see below)*
S10	Surveying; Platting; Mapping; Flood Plain Studies	6
P06	Planning (Site, Installation, and Project)	5
T03	Traffic and Transportation Engineering	6
C15	Construction Management	8
C16	Construction Survey	3
E11	Environmental Planning	1
G04	GIS Services: Development, Analysis, and Data Collection	1
W02	Water Resources: Hydrology Ground Water	5
P05	Planning (Community, Regional, Areawide, and State)	1

11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS

(Insert revenue index number shown at right)

a. Federal Work	-
b. Non-Federal Work	8
c. Total Work	8

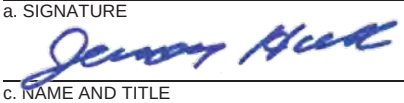
PROFESSIONAL SERVICES REVENUE INDEX NUMBER

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

12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE



b. DATE: October 9, 2025

c. NAME AND TITLE: Jerron K. Hull, PE, President & CEO, Principal

AIM Engineering & Surveying, Inc. – Professional Licenses

Ron DeSantis, Governor

Melanie S. Griffin, Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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

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

HULL, JERRON KAREY
2161 FOWLER ST.
FORT MYERS FL 33901

LICENSE NUMBER: PE59365
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

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

Licensee

Name:	**AIM ENGINEERING & SURVEYING, INC.**	License Number:	**3114**
Rank:	**Registry**	License Expiration Date:	
Primary Status:	**Current**	Original License Date:	**02/23/1981**

Related License Information

License Number	Status	Related Party	Relationship Type	Relation Effective Date	Rank	Expiration Date
25453	Delinquent, Active	HULL, JAMES DAVID	Registry		Professional Engineer	02/28/2025
59365	Current, Active	HULL, JERRON KAREY	Registry		Professional Engineer	02/28/2027

Florida Department of Agriculture and Consumer Services
Division of Consumer Services
Board of Professional Surveyors and Mappers
2005 Apalachee Pkway Tallahassee, Florida 32399-6500

License No.: **LB3114**
Expiration Date February 28, 2027

Professional Surveyor and Mapper Business License

Under the provisions of Chapter 472, Florida Statutes

AIM ENGINEERING & SURVEYING INC
2161 FOWLER ST STE 100
FORT MYERS, FL 33901-3902

WILTON SIMPSON
COMMISSIONER OF AGRICULTURE

This is to certify that the professional surveyor and mapper whose name and address are shown above is licensed as required by Chapter 472, Florida Statutes.

Florida Department of State

State of Florida
Department of State

I certify from the records of this office that AIM ENGINEERING & SURVEYING, INC. is a corporation organized under the laws of the State of Florida, filed on June 18, 1990.

The document number of this corporation is L80948.

I further certify that said corporation has paid all fees due this office through December 31, 2025, that its most recent annual report/uniform business report was filed on January 23, 2025, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Twenty-third day of January, 2025

Secretary of State

Tracking Number: 8835677091CC

To authenticate this certificate,visit the following site,enter this number, and then follow the instructions displayed.

https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication

Florida Sunbiz Certification

2025 FLORIDA PROFIT CORPORATION ANNUAL REPORT

FILED
Jan 23, 2025
Secretary of State
8835677091CC

DOCUMENT# L80948

Entity Name: AIM ENGINEERING & SURVEYING, INC.

Current Principal Place of Business:

2161 FOWLER STREET
SUITE 100
FORT MYERS, FL 33901

Current Mailing Address:

2161 FOWLER STREET
SUITE 100
FORT MYERS, FL 33901 US

FEI Number: 65-0197775

Certificate of Status Desired: Yes

Name and Address of Current Registered Agent:

HULL, JERRON K
2161 FOWLER STREET
SUITE 100
FORT MYERS, FL 33901 US

The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.

SIGNATURE:

Electronic Signature of Registered Agent — Date

Officer/Director Detail :

Title	S VP	Title	T
Name	HULL, JADON D	Name	LEVY, TRACY
Address	2161 FOWLER STREET SUITE 100	Address	2161 FOWLER STREET SUITE 100
City-State-Zip:	FORT MYERS FL 33901	City-State-Zip:	FORT MYERS FL 33901
Title	PRESIDENT, CEO	Title	VP
Name	HULL, JERRON K	Name	FLYNN, BERNARD L III
Address	2161 FOWLER STREET SUITE 100	Address	2161 FOWLER STREET SUITE 100
City-State-Zip:	FORT MYERS FL 33901	City-State-Zip:	FORT MYERS FL 33901
Title	VP	Title	VP
Name	DONAHOO, SEAN	Name	SWETS, SHAWN D
Address	2161 FOWLER STREET SUITE 100	Address	2161 FOWLER STREET SUITE 100
City-State-Zip:	FORT MYERS FL 33901	City-State-Zip:	FORT MYERS FL 33901
Title	VP	Title	VP
Name	RATICAN, DAWN	Name	FICHTER, HENRY GRANT
Address	2161 FOWLER STREET SUITE 100	Address	2161 FOWLER STREET SUITE 100
City-State-Zip:	FORT MYERS FL 33901	City-State-Zip:	FORT MYERS FL 33901

Continues on page 2

I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.

SIGNATURE: TRACY LEVY TREASURER 01/23/2025

Electronic Signature of Signing Officer/Director Detail — Date

Officer/Director Detail Continued :

Title	VP	Title	VP
Name	SCHROEDER, DANIEL	Name	GIBSON, DAJANA
Address	2161 FOWLER STREET SUITE 100	Address	2161 FOWLER STREET SUITE 100
City-State-Zip:	FORT MYERS FL 33901	City-State-Zip:	FORT MYERS FL 33901

Personnel Professional Licenses & Certifications



Ron DeSantis, Governor

Melanie S. Griffin, Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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

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

RIVERA, JAMIE WILSON
3122 CHAMPION RING RD
UNIT 304
FORT MYERS FL 33905

LICENSE NUMBER: PE94230
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com

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ASSOCIATION OF STATE
FLOODPLAIN MANAGERS, INC.
CERTIFICATION BOARD OF REGENTS

HEREBY CERTIFIES THAT PURSUANT TO THE PROVISIONS OF THE CHARTER FOR THE CERTIFIED FLOODPLAIN MANAGER PROGRAM

Jamie Wilson Rivera, CFM

IS DULY REGISTERED AS AN

ASFPM CERTIFIED FLOODPLAIN MANAGER

IN TESTIMONY WHEREOF THIS CERTIFICATE HAS BEEN ISSUED BY THE AUTHORITY OF THE CERTIFICATION BOARD OF REGENTS, CERTIFICATE NO. US-23-12980, ISSUED 11/17/2023. THIS CERTIFICATE SHALL EXPIRE 1/31/2028, UNLESS RENEWED ACCORDING TO THE RULES OF THIS BOARD.

CERTIFICATION BOARD OF REGENTS
PRESIDENT, ROGER LINDSEY, P.E., CFM

ASSOCIATION OF STATE FLOODPLAIN MANAGERS
EXECUTIVE DIRECTOR, CHAD M. BERGINNIS, CFM

ASFPM CFM CERTIFIED



Ron DeSantis, Governor

Melanie S. Griffin, Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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

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

SCHROEDER, DANIEL WILLIAM
9791 LAS CASAS DRIVE
FORT MYERS FL 33919

LICENSE NUMBER: PE78646
EXPIRATION DATE: FEBRUARY 28, 2027
Always verify licenses online at MyFloridaLicense.com

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Project Management Institute.

THIS IS TO CERTIFY THAT

Daniel William Schroeder

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND RESOURCES AND IS HEREBY BESTOWED THE GLOBAL PROFESSIONAL CERTIFICATION

Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

Ike Nwankwo, PMP | Chair, Board of Directors

Pierre Le Manh | President & CEO

Certification Number: 3917244

Original Grant Date: 05 September 2024

Expiration Date: 05 September 2027

Citizenship: United States



Ron DeSantis, Governor

Melanie S. Griffin, Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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

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

NEFF, STEVEN MICHAEL
1210 SE VAN LOON TERR
CAPE CORAL FL 33990

LICENSE NUMBER: PE33205
EXPIRATION DATE: FEBRUARY 28, 2027
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STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL ENGINEERS

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FLYNN, BERNARD LEE
1235 CLEBURNE DRIVE
FORT MYERS FL 33919

LICENSE NUMBER: PE63907
EXPIRATION DATE: FEBRUARY 28, 2027
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Personnel Professional Licenses & Certifications – *Continued*

Florida Department of Agriculture and Consumer Services
Division of Consumer Services
Board of Professional Surveyors and Mappers
2005 Apalachee Pkway Tallahassee, Florida 32399-6500

License No.: LS7453
Expiration Date February 28, 2027

Professional Surveyor and Mapper License

Under the provisions of Chapter 472, Florida Statutes

HENRY GRANT FICHTER
PO BOX 1002
ALVA, FL 33920-1902

WILTON SIMPSON
COMMISSIONER OF AGRICULTURE

LICENSEE DETAILS *11:50:42 AM 3/4/2025*

Licensee Information

Name:	ARRIAGA, GIOVANNI (Primary Name)
Main Address:	4602 CONNIE AVE N LEHIGH ACRES Florida 33971
County:	LEE

License Information

License Type:	Engineering Intern
Rank:	Eng Intern
License Number:	1100027909
Status:	Current
Licensure Date:	07/15/2024
Expires:	

LICENSEE DETAILS *11:52:21 AM 3/4/2025*

Licensee Information

Name:	RIVERA, MAX JAMES (Primary Name)
Main Address:	3122 CHAMPION RING RD UNIT 304 FORT MYERS Florida 33905
County:	LEE

License Information

License Type:	Engineering Intern
Rank:	Eng Intern
License Number:	1100028011
Status:	Current
Licensure Date:	07/16/2024
Expires:	

E-Verify

E-Verify

Company ID Number: 147103

Information Required for the E-Verify Program **Information relating to your Company:**	
Company Name	AIM Engineering & Surveying, Inc.
Company Facility Address	2161 Fowler Street Suite 100 Ft Myers, FL 33901
Company Alternate Address	
County or Parish	LEE
Employer Identification Number	650197775
North American Industry Classification Systems Code	541
Parent Company	Same as above
Number of Employees	100 to 499
Number of Sites Verified for	8

COI – General Liability

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 6/27/2025

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 Five County Insurance Agency, Inc. 14120 Metropolis Ave Ft. Myers FL 33912	**CONTACT NAME:** **PHONE (A/C, No, Ext):** 239-939-1400 **FAX (A/C, No):** 239-939-3813 **E-MAIL ADDRESS:** certs@fivecountyinsurance.com
INSURED AIMEN-2 AIM Engineering & Surveying, Inc 2161 Fowler Street, Suite 100 Fort Myers FL 33901	**INSURER(S) AFFORDING COVERAGE** — **NAIC #** **INSURER A :** Westchester Surplus Lines Insurance Company — 10172 **INSURER B :** The Charter Oak Fire Insurance Company — 25615 **INSURER C :** St. Paul Protective Ins. Co. — 19224 **INSURER D :** Travelers Property Casualty Co of America — 25674 **INSURER E :** The Travelers Indemnity Company — 25658 **INSURER F :**

COVERAGES **CERTIFICATE NUMBER:** 2038938481 **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
B	X **COMMERCIAL GENERAL LIABILITY** CLAIMS-MADE [X] OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY [X] PRO-JECT [ ] LOC OTHER:	Y	Y	P660B4181396COF25	7/1/2025	7/1/2026	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG $	$ 1,000,000 $ 300,000 $ 15,000 $ 1,000,000 $ 2,000,000 $ 2,000,000 $
C	**AUTOMOBILE LIABILITY** X ANY AUTO OWNED AUTOS ONLY [ ] SCHEDULED AUTOS X HIRED AUTOS ONLY [X] NON-OWNED AUTOS ONLY	Y	Y	810B42380312543G	7/1/2025	7/1/2026	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident) $	$ 1,000,000 $ $ $ $
D	X **UMBRELLA LIAB** [X] OCCUR **EXCESS LIAB** [ ] CLAIMS-MADE DED [X] RETENTION $ 10,000	Y	Y	CUPB42567922543	7/1/2025	7/1/2026	EACH OCCURRENCE AGGREGATE $	$ 5,000,000 $ 5,000,000 $
E	**WORKERS COMPENSATION AND EMPLOYERS' LIABILITY** Y / N ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? [N] **(Mandatory in NH)** If yes, describe under DESCRIPTION OF OPERATIONS below	N / A	Y	UBB42564302543G	7/1/2025	7/1/2026	X PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ 1,000,000 $ 1,000,000 $ 1,000,000
A	Contractors Pollution Liability			APP#07012025	7/26/2025	7/26/2026	Each Occurrence: General Aggregate:	1,000,000 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
This is a SAMPLE only certificate for BIDDING PURPOSES only.

CERTIFICATE HOLDER

AIM Engineering & Surveying, Inc
2161 Fowler Street, Suite 100
Fort Myers FL 33901

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

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COI – Professional Liability

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 7/1/2025

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 Private Client Insurance Services 9736 Commerce Centre Ct. Fort Myers FL 33906	**CONTACT NAME:** Sandy Balzarini **PHONE (A/C, No, Ext):** 239-481-1949 **FAX (A/C, No):** 888-853-7192 **E-MAIL ADDRESS:** sbalzarini@pcis-fl.com
	INSURER(S) AFFORDING COVERAGE / **NAIC #**
	INSURER A : Pacific Insurance Co LTD
INSURED AIME-01 AIM Engineering & Surveying, Inc. 2161 Fowler Street, Suite 100 Fort Myers FL 33901	**INSURER B :** Hartford Fire Insurance Co 19682 **INSURER C :** **INSURER D :** **INSURER E :** **INSURER F :**

COVERAGES **CERTIFICATE NUMBER:** 2095641651 **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY	Y					EACH OCCURRENCE	$
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$
							MED EXP (Any one person)	$
							PERSONAL & ADV INJURY	$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$
	☐ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG	$
	☐ OTHER:							$
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)	$
	☐ ANY AUTO						BODILY INJURY (Per person)	$
	☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	☐ **UMBRELLA LIAB** ☐ OCCUR						EACH OCCURRENCE	$
	☐ **EXCESS LIAB** ☐ CLAIMS-MADE						AGGREGATE	$
	☐ DED ☐ RETENTION $							$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N						☐ PER STATUTE ☐ OTH-ER	
	ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? **(Mandatory in NH)**	N / A					E.L. EACH ACCIDENT	$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$
							E.L. DISEASE - POLICY LIMIT	$
A	Professional Liability			21 OH 0656913-25	7/1/2025	7/1/2026	Each Claim/Aggregate	5,000000/5,000,000
B	Directors & Officers			21 KB 0785867-25	7/1/2025	7/1/2026	Deductible	100,000
							Limit/Deductible	1,000,000/1,000

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

CERTIFICATE HOLDER

FOR INFORMATION ONLY .. ..

CANCELLATION 10 Days

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

Elaine Hawkins

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4Bii.



Naples Heritage
COMMUNITY DEVELOPMENT DISTRICT

REQUESTS FOR QUALIFICATIONS FOR ENGINEERING SERVICES
NAPLES HERITAGE COMMUNITY DEVELOPMENT DISTRICT

Barraco and Associates, Inc.

2271 McGregor Boulevard Suite 100
Fort Myers, FL 33901
www.barraco.net

Barraco and Associates, Inc.
www.barraco.net
Civil Engineers, Land Surveyors and Planners

October 17, 2025

Naples Heritage Community Development District
c/o Mr. Justin Faircloth
District Manager
Inframark Community Management Services
11555 Heron Bay Boulevard, Suite 201
Coral Springs, Florida 33076

Re: Request for Qualifications for Professional Engineering Services
Naples Heritage Community Development District

Dear Mr. Faircloth:

Barraco and Associates, Inc. (BAI) is pleased to submit this Statement of Qualifications to the Naples Heritage Community Development District (CDD) to serve as District Engineer.

BAI proposes Carl A. Barraco, Sr., P.E., to serve as District Engineer, with assistance from Carl Barraco, Jr., P.E., Frank Savage, and Douglas Tarn. Mr. Barraco, Sr.'s experience with CDDs is diversified, including serving as CDD Supervisor for two independent Districts in Lee County for a combined tenure of eight years, assisting with the establishment of 27 CDDs, and serving as District Engineer for 27 Districts over the years. **The Firm currently serves as District Engineer for 22 CDDs.** This experience provides a thorough knowledge of CDDs including their operating procedures and budgets. Mr. Savage and Mr. Tarn assist Mr. Barraco with a number of the Firm's current CDD responsibilities including meeting attendance, project management, field operations and construction services. Many CDDs do not have daily engineering issues; therefore, in order to preserve the CDD budget, BAI confirms with the respective CDD Manager whether the District Engineer's presence is needed or requested for each scheduled CDD BOS meeting.

Barraco and Associates appreciates this opportunity to provide the Firm's qualifications for District Engineer for the Naples Heritage Community Development District and we look forward to the opportunity to provide professional services to the Naples Heritage CDD.

If you should have any questions or require additional information, please advise.

Very truly yours,
BARRACO AND ASSOCIATES, INC.

Carl A. Barraco, P.E.
President
Proposed District Engineer

Very truly yours,
BARRACO AND ASSOCIATES, INC.

Frank Savage
Proposed CDD Project Manager

QUALIFICATIONS



Barraco and Associates, Inc. (BAI) is a civil engineering, land surveying, and land planning firm established in 1998; however, the firm's senior staff members have worked together for over 35 years in Southwest Florida. This history of shared work experience provided the solid foundation on which to build the firm and quickly established BAI as a regional leader of professional consulting firms in Southwest Florida.

The firm's mission is to assist clients in achieving their project objectives by providing highly responsive, technically sound, cost-effective services. The firm's sincere commitment to consistently providing clients with outstanding service is tied directly to our attention to detail and dedication to our clients and their projects.

BAI headquarters is conveniently located in downtown Fort Myers and a second office is located in Panama City Beach, Florida. Our office locations, coupled with interaction on numerous projects over the years, have secured a working knowledge and skillful aptitude of the criteria, processes, policies and procedures utilized for planning, permitting, designing and construction of projects in Florida. This experience has afforded BAI valuable insights to the various public information approaches along with a history of precedents, agency staff and working relationships among the involved entities.

Proposed CDD Management Personnel:



Carl A. Barraco, Sr., P.E.
District Engineer



Frank Savage
CDD Senior Project Manager



Douglas Tarn
Construction Services

For the Naples Heritage Community Development District, BAI proposes Carl A. Barraco, Sr., P.E., as District Engineer, Frank Savage as CDD Project Manager and Douglas Tarn as Construction Services Manager. **Regular District meeting attendance will be handled by Mr. Barraco, Sr. and/or Mr. Savage, and Mr. Tarn will handle construction services requests**.

Offered Professional Services:

BAI currently employs 59 residents of Lee County and has additional staff in the Panama City office. Staff include six licensed professional engineers, three licensed surveyors, a certified land planner, five project managers, designers, construction inspectors, survey field crews, and administrative staff.



Engineering:

- Community Development Districts-District Engineer Duties
- Engineering Cost Analysis
- Traffic Impact Studies
- Utility Design
- Stormwater Management
- Roadway Design
- Permitting
- Utility Coordination
- Emergency Preparedness Plans
- Signing and Marking Design
- Access Management
- Project Management
- Intersection Design
- Maintenace of Traffic Plans
- Expert Witness
- Design Alternatives Construction Plan preparation
- Technical Specifications

Surveying and Mapping:

- Boundary and Control Surveys
- Sketches and Legal Descriptions
- Topographic Surveys
- Subdivision Platting
- Construction Stakeout
- GPS Services
- Deed Research
- Mortgage Inspections
- Right-of-Way Surveys
- Jurisdictional Surveys

Construction Administration:

- Construction Engineering and Inspection (CEI)
- Assistance with Contractor Selection
- Design and Constructability Reviews
- Observation Activities
- Obtain Record Information
- Shop Drawings Reviews
- Contractor Pay Request Review
- Testing Materials & Result Review
- Pre-construction Meetings
- Public Information Facilitation
- Public Involvement Workshops

Planning:

- Planned Development Rezoning
- Special Exceptions and Variances
- Community Planning
- Developments of Regional Impact (DRI)
- Due Diligence/Feasibility Study
- Comprehensive Plan Amendments
- Conflict Resolution
- Public Involvement & Facilitation
- Design Guidelines
- Zoning
- Master Concept Plans

Current CDD Clients

BAI **currently** is the District Engineer and provides ongoing services for **22 different CDDs;** Additionally, BAI has helped establish 27 different CDDs over the years. Our current service areas include the following 7 counties: Lee, Collier, Charlotte, Hendry, Glades, Highlands, and DeSoto.

- ***Kingston One***
- ***Lucaya***
- ***Mirada***
- ***Moody River Estates***
- ***WildBlue***
- ***Orange Blossom Ranch***
- ***Paseo***
- ***Bayside***
- ***River Hall***
- ***Saltleaf***
- ***Stonewater***
- ***Tuckers Pointe***
- ***V-Dana***
- ***Victory Park***
- ***Waterford Landing***
- ***Orange Blossom Groves***
- ***Bay Creek***
- ***Blue Lake***
- ***Catalina at Winkler***
- ***Preserve***
- ***Coral Creek***
- ***Corkscrew Farms***
- ***Del Webb Oak Creek***

BAI's Approach to Providing Engineering Services to CDDs

Our approach is rooted in our extensive experience and understanding of the myriad, evolving responsibilities of a CDD throughout its ongoing life cycle. Prioritizing timely, well-informed and transparent communication, with a focus on educating and advising the CDD as to its obligations and responsibilities, particularly as the CDD Board of Supervisors shifts from developer to residential control, is paramount to being a successful District Engineer. BAI also emphasizes relationship building, and takes pride in maintaining strong, collegial relationships with many of the leading management and counsel entities in this area. Additionally, BAI understands CDDs vary greatly when it comes to size and budget, and we aim to help identify and navigate issues which may put a strain on the budgetary considerations of a CDD through assistance in establishing systems and processes for identification and prioritization of issues which may reasonably come before the CDD.



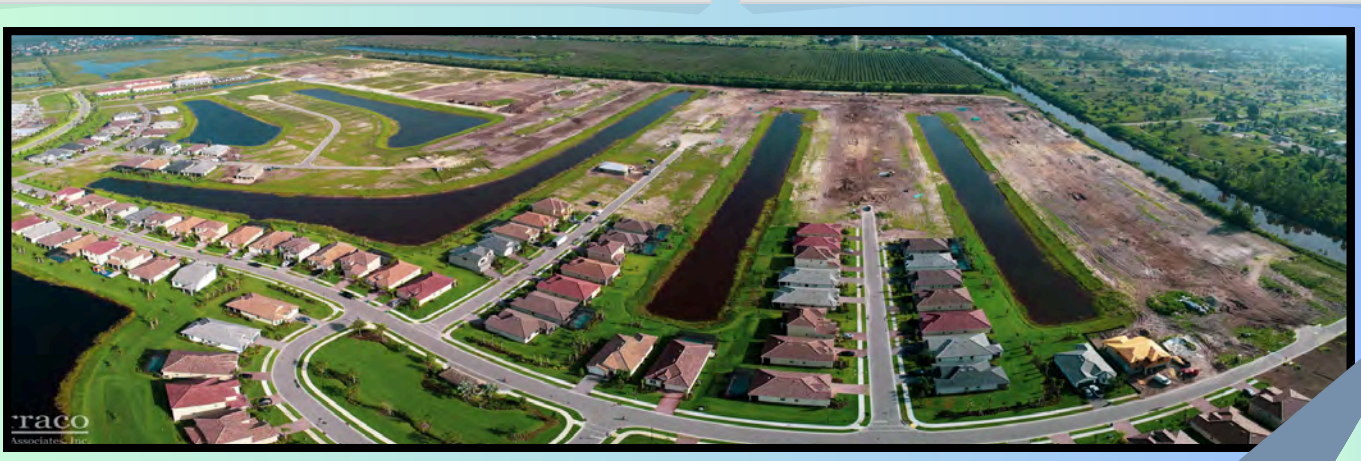
Past Experience and Performance for CDD projects in Collier County:

Orange Blossom Ranch and Orange Blossom Groves CDDs, Naples: Establishment of CDDs for Newly Constructed Developments - Ongoing



BAI initially worked with staff and the developer team to establish both Districts. Concurrently, BAI generated master engineer's reports to establish the Capital Improvement Projects (CIP) for each respective District. These reports include order of magnitude cost estimates that establish maximum bonding limits based on the anticipated costs to complete the CIP for each district. As construction bonds became available, BAI worked with District staff and the development team to prepare pay requisitions over the completed improvements, which conveyed the completed improvements to the District for perpetual operation and maintenance responsibilities. For some portions of the development, the construction and conveyance work is completed and for other portions of the development, construction work remains ongoing. For those improvements completed and conveyed to the District, BAI continues to support the District by performing scheduled inspections of the improvements and providing guidance to the District BOS and staff. **BAI in 2025 has started concentrating more efforts into obtaining CDDs within Collier County to match the company's ongoing growth within the county.**

District Manager: Andrew Kantarzhi	**Clients of BAI since 2015 (Orange Blossom Ranch) and 2016 (Orange Blossom Groves)**



Examples of Current ongoing Active CDD Client Projects

CDD:	Active Projects:	Description:
Corkscrew Farms	HB 7013 inspection report	Annual, ongoing inspection and reporting of current conditions of District facilities.
Blue Lake	Recreational lake restoration	Assist permitting, coordination, design and CEI for approximately 6,500 linear feet of recreational lake bank impacted by prior hurricane events. Task involves generating supplemental engineering report to support financing.
Paseo	Comprehensive storm sewer inspections	Inspection of entire storm sewer system for sediment accumulation and preparation of report and exhibit providing recommendations for those portions of the system that should be considered for cleaning.
Moody River Estates	Surface water lake bank remediation	Ongoing support for remediation of various lake banks experiencing erosion conditions. Task includes preparing detailed remediation plans and CEI services needed to certify the remediation work is complete.
V-Dana	Construction bond certifications	Assist with the final closeout of construction bonds by verifying and certifying the improvements associated with the District's Capital Improvement Plan are complete.
Kingston One	District acquisition/ pay requisition support	Review various expenses incurred associated with the Development and determine the extent to which those expenses align with improvements of the District's Capital Improvement Plan. This task also includes preparation of pay requisition documents to support the acquisition of those improvements.
Saltleaf	Plat review and easement needs analysis	Examine existing and proposed dedications, via land transfers, plats or separate instruments, and provide guidance regarding the sufficiency of those dedications over anticipated District improvements.
Lucaya	NPDES MS4 Annual Reporting	Inspect SWMS facilities, analyze nutrient data, and prepare an Annual Report for the District as part of the larger Lee County MS4 permit to be provided annually to FDEP.

Willingness to Meet Time/Budget Requirements

With 27 years of experience, BAI takes great pride in the firm's track record of providing timely and efficient professional services to its clients. If a situation arises wherein additional in-house staff assistance is needed to meet a deadline or maintain a project schedule, BAI has the staffing available to reallocate resources to ensure project schedules and budgets are maintained throughout the duration of the project. **BAI staff members understand one of the most significant measures of the success of a project is whether or not the project budget and schedule are maintained.**

BAI is unique amongst other engineering firms with having **2 specific members of staff that are solely dedicated to our CDDs** and their overall management:

Frank Savage - CDD Senior Project Manager
franks@barraco.net

Rachel Wright - CDD Project Assistant
rachelw@barraco.net



MBE Status

BAI is not a certified MBE; however, the firm proudly utilizes MBE subconsultants when additional consultant assistance may be required. The local companies that we've partnered with in the past are Lomski Engineering and Cella Molnar & Associates.

Volume of Work Previously Awarded by CDD

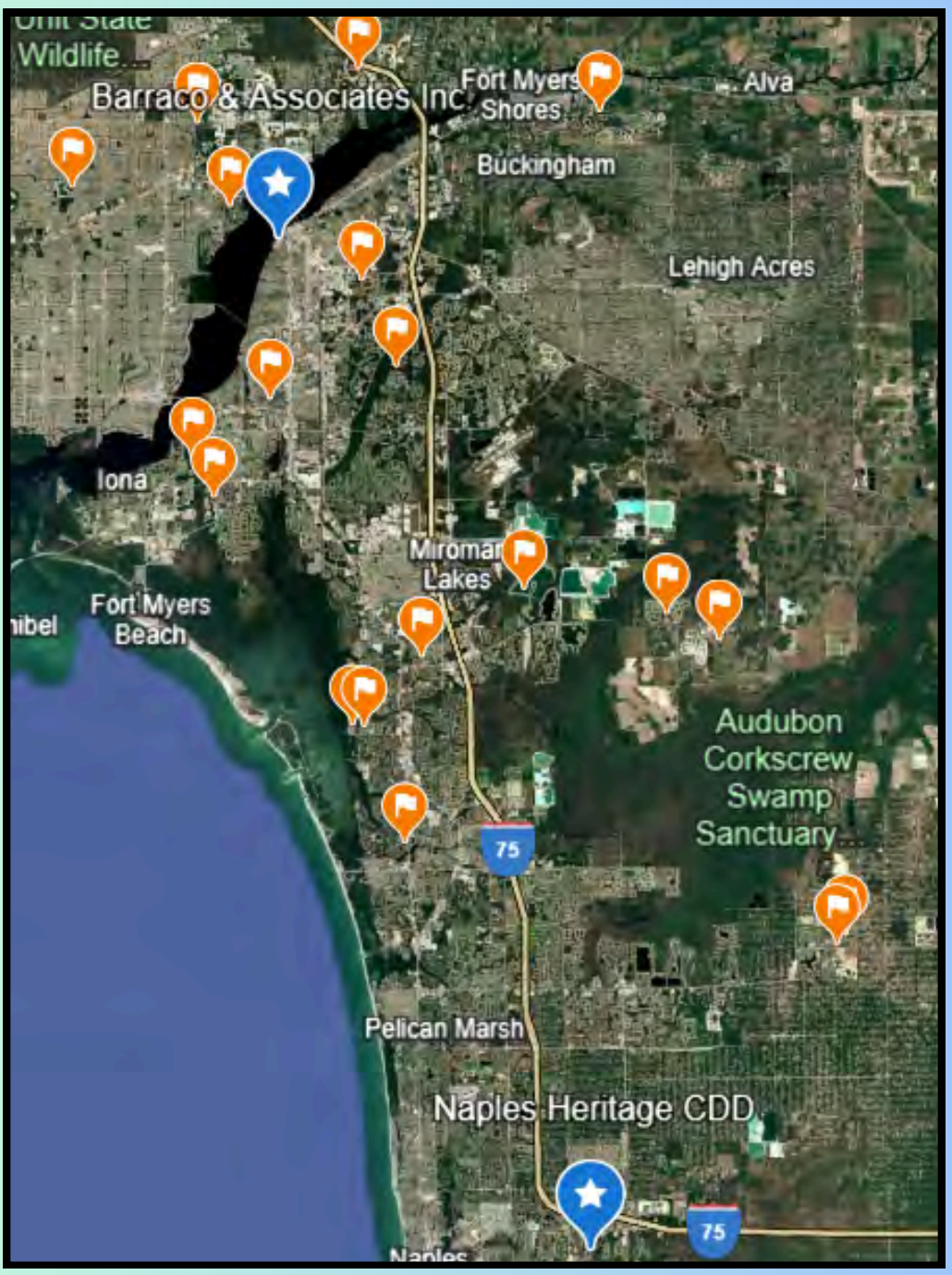
The firm has not provided any services to the Naples Heritage CDD.

LOCATION & ACCESSIBILITY



BAI's corporate headquarters is located in Fort Myers, Florida which is where the proposed staff operates out of. BAI is currently operating in the following 7 counties: Lee, Collier, Charlotte, Hendry, Glades, Highlands, and DeSoto.

Barraco's main office off McGregor Blvd is about **36 miles away from Naples Heritage**. We currently provide services for 22 different CDDs throughout Southwest Florida.



The following persons are authorized to make representations for respondent:

Carl A. Barraco, P.E. - President
2271 McGregor Blvd. Suite 100
Fort Myers, FL 33901
CarlB@barraco.net
Phone: (239) 461-3170
Cell Phone: (239) 633-4285
Fax: (239) 461-3169

Frank Savage - Senior Project Manager
2271 McGregor Blvd. Suite 100
Fort Myers, FL 33901
Franks@barraco.net
Phone: (239) 461-3170
Fax: (239) 461-3169



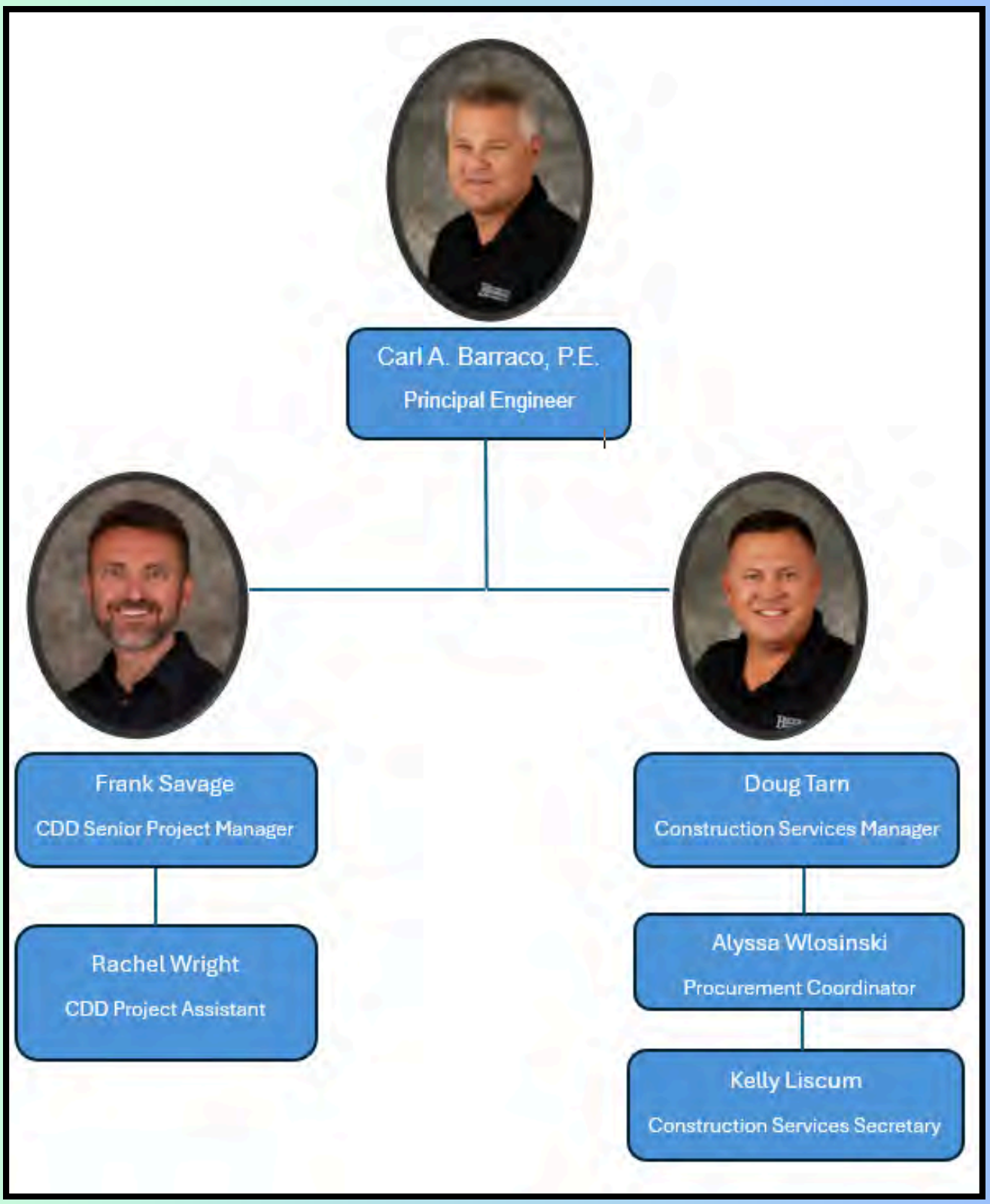
References

Mr. Graydon (Grady) E. Miars
(Client)
President GreenPointe Communities, LLC
7807 Baymeadows Road, E. Suite 205
Jacksonville, FL 32256
904-996-2485
gmiars@greenpointellc.com

Mr. Greg Urbancic
(District Counsel)
Coleman Yovanovich & Koester, P.A.
4001 Tamiami Trail North, Suite 300
Naples, FL 34103
239.435.3535 gurbancic@cyklawfirm.com

Mr. Chesley "Chuck" E. Adams, Jr.
(District Manager)
Director of Operations Wrathell, Hunt and Associates, LLC
9220 Bonita Beach Road, Suite 214
Bonita Springs, FL 34135
239.464.7114
adamsc@whhassociates.com

FIRM ORGANIZATION





CARL A. BARRACO, P.E.

President - Principal in Charge

Carl A. Barraco, along with his associates, formed Barraco and Associates, Inc., in April 1998. Prior to this time he was a senior shareholder and served on the Board of Directors of a large Southwest Florida engineering and surveying firm.

Mr. Barraco has been providing engineering services in Southwest Florida for 41 years. His professional experience is well diversified as illustrated below:

1. Principal in Charge for **U.S. 41 Transmission Line Improvements (Alico Road to Colonial Boulevard, Phases 1A- 1, 2A-West and 2A-East)** project for Lee existing forcemain and watermain from south of Old Gladiolus Drive to north of Crystal Drive in Fort Myers. To alleviate impacts to traffic, BAI successfully designed and coordinated the construction of watermain and forcemain directional bores beneath U.S. 41 and many side roads. To minimize construction costs and maintain an effective design, BAI coordinated with FDOT for simultaneous installation of the new 8-foot sidewalk being constructed within U.S. 41 right-of- way.

2. Project Engineer for **Corkscrew Farms**, a total of 1,325 residential unit subdivision, being constructed in two phases, located in Lee County. Services included providing for infrastructure including all drainage, water and sewer design.

3. Project Engineer for **Paseo**, a 444-acre, 1,149 - unit residential subdivision located in Fort Myers, Florida. Services included providing for infrastructure including all drainage, water and sewer design.

4. Project Engineer for full infrastructure to support the **River Hall** subdivision, a 2,000-acre, 1,199-unit residential subdivision, located off S.R. 80 in Lee County. Included infrastructure design and construction of over 20 miles of multiple diameter watermains, 18 miles of gravity sewer, 8.5 miles of forcemain including a Lee County Utilities 4,500 LF forcemain within SR 80 ROW.

5. Project Engineer/Manager for **Somerset at the Plantation**, a 1,269-acre, 530-unit subdivision located in Fort Myers, Florida. Services included providing for infrastructure including all drainage, water and sewer design, permitting and certifications.

// EDUCATION

University of South Florida B.S.

Civil Engineering - 1984

M.S. Civil Engineering - 1987

// PROFESSIONAL REGISTRATION

Florida P.E. #38536

// PROFESSIONAL AFFILIATIONS

- American Society of Civil Engineers Florida Engineering Society (FES)
- National Society of Professional Engineers

// HONORS

2016
Florida Engineering Society Calusa Chapter Engineer of the Year

1998
Asphalt Contractors Assn. of Fl, Inc. District One Road and Streets Award

1993-1994
FES - Calusa Chapter Young Engineer of the Year

1983
American Society of Civil Engineers Student Engineer of the Year



// EDUCATION

Florida Gulf Coast University M.S., Applied Mathematics - 2018

University of Florida B.A., Mathematics - 2003

// CURRENTLY REPRESENTING THE FOLLOWING CDDS

- Bayside
- Bay Creek
- Orange Blossom Groves
- Blue Lake
- Orange Blossom Ranch
- Catalina at Winkler Preserve
- Paseo
- Coral Creek
- River Hall
- Corkscrew Farms
- Saltleaf
- Del Webb Oak Creek
- Treeline Preserve
- Kingston
- Tuckers Pointe
- Lucaya
- V-Dana
- Mirada
- WildBlue
- Moody River Estates
- Victory Park

FRANK SAVAGE

Senior CDD Project Manager

Frank Savage entered the civil engineering discipline in March 2006 when he joined Barraco and Associates, Inc. as an Assistant Project Manager, where he was employed until June 2012, before re-entering the field in August 2023, giving Mr. Savage over seven years of experience in the field of engineering.

Mr. Savage represents the District Engineer for various Community Development Districts (CDDs), where he works in conjunction with the District Manager, District Counsel, and District Board of Supervisors to provide professional services, recommendations and guidance related to District-owned and operated facilities.

Mr. Savage has concentrated his efforts on overseeing the design, permitting, construction and certification of utilities and water management systems for commercial and residential developments. His experience includes, but is not limited to, the following residential, commercial, and governmental projects on which he performed the duties of Lead Project Manager:

- **Corkscrew Farms:** Mr. Savage is responsible for aiding the district engineer and being the liaison with the Board of Supervisors and staff for district supporting. This CDD has a total of 1,325 residential unit subdivision, located in Lee County. Services included providing for infrastructure including all drainage, water and sewer design.
- **V-Dana:** Mr. Savage is responsible for aiding the district engineer and being the liaison with the Board of Supervisors and staff for district supporting. This CDD has a total of 2,400 residential units in the subdivision, located in Lee County. Services included providing for infrastructure including all drainage, water and sewer design.
- **Blue Lake:** Mr. Savage is responsible for aiding the district engineer and being the liaison with the Board of Supervisors and staff for district supporting. This CDD has a total of 432 single-family residential units, located in Lee County. Services included providing for infrastructure including all drainage, water and sewer design.



// EDUCATION

Santa Fe College A.A.S. Building Construction Technology (emphasis on Construction Management) - 2007

// PROFESSIONAL CERTIFICATIONS

- FDOT - Temporary Traffic Control Advanced
- FDOT - Final Estimates
- FDOT - Earthwork Construction Inspection
- FDOT - Asphalt Paving Technician Level 1
- FDOT - MSE Wall
- FDEP Stormwater Management Inspector - 2008
- SFWMD Dewatering 101
- USDOT - Nuclear Gauge HAZMAT

// MILITARY SERVICES

Florida Army National Guard
Air Defense Artillery - 14S
2002-2005, Honorably Discharged

DOUGLAS TARN

Construction Services

Douglas Tarn joined the construction administration team at Barraco and Associates, Inc. in May 2007. Mr. Tarn has provided project management and construction observation services for over 16 years on projects since joining the firm, including the following:

1. Orange Grove Boulevard-Hancock Bridge Parkway to Pondella Road, Lee County – This Lee County Utilities project consisted of replacing 10” water main on the east side of Orange Grove Boulevard from just south of Hancock Bridge Parkway to Pondella Road. The project included replacing existing storm drainage as well as installing new storm drainage to make improvements within the right-of-way. Over one mile of sidewalk was removed and replaced. Additional work included roadway and driveway repairs where new water main was installed. Mr. Tarn served as project manager.

2. BAI performed **CEI and GIS services for State Road 739** (total length of 1.336 miles) for the City of Fort Myers. Most notable service provided was maintaining water and sewer service for residences and businesses during construction along the corridor. GIS services included providing as-built information after utilities were installed. Mr. Tarn served as the Senior Utility Inspector and Project Manager.

3. For the **City of Fort Myers’ Metro Parkway Utilities Relocation** project from Dr. Martin Luther King, Jr. Boulevard to Hanson Street on Evans Avenue and Fowler Street to Industrial Street on Hanson Street, Mr. Tarn witnessed and inspected the removal and installation of force main, gravity sewer, and water main. Other responsibilities included maintaining daily construction reports and client and contractor interface. This project was completed in 2008, ahead of schedule and under budget, and was constructed under a JPA between the City of Fort Myers and the FDOT.

State of Florida
Department of State

I certify from the records of this office that BARRACO AND ASSOCIATES, INC. is a corporation organized under the laws of the State of Florida, filed on March 5, 1998.

The document number of this corporation is P98000021404.

I further certify that said corporation has paid all fees due this office through December 31, 2025, that its most recent annual report/uniform business report was filed on January 22, 2025, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Eighteenth day of March, 2025

Secretary of State

Tracking Number: 0392181843CU

To authenticate this certificate,visit the following site,enter this number, and then follow the instructions displayed.

https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication

RICK SCOTT, GOVERNOR

JONATHAN ZACHEM, SECRETARY

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF PROFESSIONAL ENGINEERS

THE ENGINEERING BUSINESS HEREIN IS AUTHORIZED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

BARRACO AND ASSOCIATES, INC.

2271 MCGREGOR BOULEVARD SUITE 100
FT. MYERS FL 33901

LICENSE NUMBER: CA7995

EXPIRATION DATE: FEBRUARY 28, 2021

Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

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

Ron DeSantis, Governor

Melanie S. Griffin, Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

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

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

BARRACO, CARL ANTHONY

2271 MCGREGOR BLVD.
SUITE 100
FORT MYERS FL 339010000

LICENSE NUMBER: PE38536

EXPIRATION DATE: FEBRUARY 28, 2027

Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

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

Florida Department of Agriculture and Consumer Services
Division of Consumer Services
Board of Professional Surveyors and Mappers
2005 Apalachee Pkway Tallahassee, Florida 32399-6500

License No.: **LB6940**

Expiration Date February 28, 2027

Professional Surveyor and Mapper Business License

Under the provisions of Chapter 472, Florida Statutes

BARRACO AND ASSOCIATES INC
2271 MCGREGOR BLVD
FORT MYERS, FL 33901-3314



WILTON SIMPSON
COMMISSIONER OF AGRICULTURE

This is to certify that the professional surveyor and mapper whose name and address are shown above is licensed as required by Chapter 472, Florida Statutes.

Barraco and Associates, Inc.

www.barraco.net

Civil Engineers, Land Surveyors and Planners

RATE SCHEDULE

2025

SERVICES

Expert Witness	$ 450.00	per hour
Principal Professional Engineer **(Carl Barraco Sr.)**	$ 300.00	per hour
Senior Professional Engineer	$ 275.00	per hour
Professional Engineer	$ 225.00	per hour
Project Engineer	$ 200.00	per hour
Professional Surveyor and Mapper	$ 225.00	per hour
Senior Project Manager	$ 200.00	per hour
Project Manager	$ 175.00	per hour
Principal Planner	$ 195.00	per hour
CDD Manager **(Frank Savage)**	$ 150.00	per hour
Senior Planner	$ 165.00	per hour
Senior Project Technician	$ 175.00	per hour
Project Technician	$ 150.00	per hour
Senior Construction Observer **(Doug Tarn)**	$ 150.00	per hour
Construction Observer	$ 125.00	per hour
Senior Project Services	$ 125.00	per hour
Project Services **(Rachel Wright)**	$ 100.00	per hour
Two Man Survey Crew	$ 200.00	per hour
Three Man Survey Crew	$ 255.00	per hour
Four Man Survey Crew	$ 295.00	per hour

REIMBURSABLE EXPENSES

11" x 17" color copy	$1.65	EA
11" x 17" copy	$0.16	EA
24" x 36" Bond Print	$1.65	EA
24" x 36" High Gloss Photo	$52.80	EA
24" x 36" Mylar Print	$8.80	EA
8½" x 11" copies	$0.07	EA
Courier - Bonita Springs	$40.00	EA
Courier - Fort Myers	$20.00	EA
Courier - Naples	$60.00	EA
Courier Services - Port Charlotte	$25.00	EA
24" x 36" Color Aerial	$25.00	EA
24" x 36" Bond Color Print	$20.00	EA

Cost Plus 10%

Equipment Rental

Miscellaneous (Expense)

Permit Fees

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

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

Naples Heritage Community Development District Request for Qualifications

2. PUBLIC NOTICE DATE	3. SOLICITATION OR PROJECT NUMBER
	N/A

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

Carl A. Barraco, P.E.

5. NAME OF FIRM

Barraco and Associates, Inc.

6. TELEPHONE NUMBER	7. FAX NUMBER	8. E-MAIL ADDRESS
239.461.3170	**239.461.3169**	**carlb@barraco.net**

C. PROPOSED TEAM

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

	(Check) PRIME	(Check) J-V PARTNER	(Check) SUBCON-TRACTOR	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
a.	X			**Barraco and Associates, Inc.** [X] CHECK IF BRANCH OFFICE	**2271 McGregor Boulevard Suite 100 Fort Myers, FL 33901**	**District Engineer**
b.				[ ] CHECK IF BRANCH OFFICE		
c.				[ ] CHECK IF BRANCH OFFICE		
d.				[ ] CHECK IF BRANCH OFFICE		
e.				[ ] CHECK IF BRANCH OFFICE		
f.				[ ] CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM [X] *(Attached)* **On Page 5**

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Carl A. Barraco, Sr., P.E.	**District Engineer**	**41**	**27**

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

Barraco and Associates, Inc. - Fort Myers, Florida

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
M.S. - Civil Engineering (1987) **B.S. - Civil Engineering (1984)**	**Professional Engineering License No. 38536 - Florida**

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

Florida Engineering Society, Calusa Chapter - Engineer of the Year (2015-16); Roads & Streets Award presented by District One of the Asphalt Contractor Assn. of Fla., Inc. (1998): FES Calusa Chapter - Young Engineer of the Year Award (1993-94); American Society of Civil Engineers - Student Engineer of the Year (1983)

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*: **Paseo Development - Fort Myers (Lee County, FL)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **2011** | CONSTRUCTION *(If applicable)*: **2014-2015**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE — ☑ Check if project performed with current firm

Project Engineer/Manager for 444-acre, 1,149 unit residential subdivision; services included design for project infrastructure including all drainage, water and sewer; estimated infrastructure construction costs for Phase 1 is $10,400,000.

b.

(1) TITLE AND LOCATION *(City and State)*: **Bayside/Bay Creek CDD (Lee County, Florida)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **N/A**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE — ☑ Check if project performed with current firm

District Engineer for the Bayside and Bay Creek Community Development Districts.

c.

(1) TITLE AND LOCATION *(City and State)*: **Corkscrew Farms CDD (Lee County, Florida)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **Continuing**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE — ☑ Check if project performed with current firm

The District includes approximately +/- 999 acres of the overall +/-1,361 acre Corkscrew Farms Development. A total of 1,325 residential units is proposed to be constructed over the course of two phases. The development is located in Lee County, Florida. Proposed public infrastructure is estimated at $51,000,000.

d.

(1) TITLE AND LOCATION *(City and State)*: **Mirada (Fort Myers, Lee County, Florida)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **N/A**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE — ☑ Check if project performed with current firm

Principal in Charge for a 59-acre, mixed use development (240 residential units, 200,000 sq. ft. medical/office space); services include design of infrastructure (paving, drainage, water, sewer, and surface water management). Not yet constructed; project has been put on hold.

e.

(1) TITLE AND LOCATION *(City and State)*: **Waterford Landing (Fort Myers, Lee County, Florida)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **Continuing**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE — ☑ Check if project performed with current firm

Principal in Charge for this 1,012-unit, 255.8-acre residential development. BAI provided full civil engineering and survey services including zoning, site design, permitting, surveys, construction administration, and project certification. Estimated infrastructure costs for this project $12,367,000.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Frank Savage	**CDD Project Manager**	**8.5**	**8.5**

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

Barraco and Associates, Inc. - Fort Myers, Florida

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State and Discipline)*
M.S. - Applied Mathematics (2018) **B.S. - Mathematics (2003)**	

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION *(City and State)*: **V-Dana Community Development District (CDD) (Lee County, FL)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **Continuing**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE

☑ Check if project performed with current firm

Support District Engineer and attendance at Board of Supervisors meetings.

b.

(1) TITLE AND LOCATION *(City and State)*: **Orange Blossom Ranch CDD (Collier County, FL)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **Continuing**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE

☑ Check if project performed with current firm

Support District Engineer and attendance at Board of Supervisors meetings.

c.

(1) TITLE AND LOCATION *(City and State)*: **Paseo CDD (Fort Myers, Lee County, FL)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **N/A**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE

☑ Check if project performed with current firm

Support District Engineer and attendance at Board of Supervisors meetings.

d.

(1) TITLE AND LOCATION *(City and State)*: **Orange Blossom Grove CDD (Collier County, FL)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **N/A**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE

☑ Check if project performed with current firm

Support District Engineer and attendance at Board of Supervisors meetings.

e.

(1) TITLE AND LOCATION *(City and State)*: **Bayside/Bay Creek CDD (Lee County, FL)**

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: **Continuing** | CONSTRUCTION *(If applicable)*: **N/A**

(3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE

☑ Check if project performed with current firm

Assist District Engineer and attendance at Board of Supervisors meetings.

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER: 1.

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Corkscrew Community Development District (CDD)	Continuing	Continuing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Corkscrew Farms CDD	**Brian Lamb, District Manager**	**813.873.7300**

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

Corkscrew Farms CDD consists of +/-999 acres of the overall +/-1,361 acre Corkscrew Farms Development. A total of 1,325 residential units is proposed to be constructed within the District over the course of two phases. The proposed infrastructure, which is considered fundable from the Bonds, is estimated at $51,000,000. This project is ongoing.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**District Engineer**
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT *(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)*	20. EXAMPLE PROJECT KEY NUMBER
	2.

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Bayside / Bay Creek CDD	**Continuing**	**N/A**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Bayside/Bay Creek CDD	**Chuck Adams, District Manager**	**239.498.9020**

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

District Engineer for the Community Development District.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**District Engineer**
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT *(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)*	20. EXAMPLE PROJECT KEY NUMBER 3.

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Paseo CDD, Fort Myers, Florida	**Continuing**	**2014-15**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Paseo CDD	**Belinda Blandon, District Manager**	**239.936.0913**

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

BAI provided full civil engineering and surveying serivces through construction on this +/-450 acre residential community 749 multi-family and 378 single family units; currently serving as District Engineer for the Community Development District.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**Civil Engineer/Surveyor/District Engineer**
b.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT
(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER: 4.

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Lucaya CDD, Fort Myers, Florida	**Continuing**	**2010**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Lucaya CDD	**Jordan Lansford, District Manager**	**813.344.4844**

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

BAI provided full civil engineering and surveying serivces through construction on this +/-99 acre, 384 unit multi-family residential community; currently serving as District Engineer for the Community Development District.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**Civil Engineer/Surveyor/District Engineer**
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT
(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER: 5.

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Catalina at Winkler Preserve CDD, Fort Myers, Florida	**Continuing**	**2013**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Catalina at Winkler Preserve CDD	**Belinda Blandon, District Manager**	**239.936.0913**

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

BAI provided civil engineering and surveying services including site design, permitting and surveying for this +/-111 acre, 282 single family unit residential development and is currently serving as District Engineer for the Community Development District.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**Civil Engineer/Surveyor/District Engineer**
b.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT *(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)*	20. EXAMPLE PROJECT KEY NUMBER 6.

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Moody River Estates CDD, Fort Myers, Florida	**Continuing**	**Continuing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Moody River Estates CDD	**Calvin Teague, District Manager**	**239.690.7100**

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

BAI provides professional services to Moody River Estates Community Development District after completion of all CDD infrastructure was completed by others.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**Civil Engineer/Surveyor/District Engineer**
b.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT *(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)*		20. EXAMPLE PROJECT KEY NUMBER 7.
21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Waterford Landing CDD, Fort Myers, Florida	**Continuing**	**Continuing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Waterford Landing CDD	**Daniel Rom, District Manager**	**561.571.0010**

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

BAI has been providing full civil engineering and survey services including zoning, site design, permitting, surveys, construction administration, and project certification for this +/-255 acre, 1,012 unit residential development and is currently serving as District Engineer for the CDD.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**Civil Engineer/Surveyor/District Engineer**
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT
(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER: 8.

21. TITLE AND LOCATION *(City and State)*: **Mirada CDD, Fort Myers, Florida**

22. YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Continuing	**Continuing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Mirada CDD	**Paul Winkeljohn, District Manager**	**954.721.8681**

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

BAI provided infrastructure design including paving, drainage, water, sewer and surface water management for this +/-59 acre mixed use development (240 residential units, 200,000 sf of medical office space).

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**Civil Engineer/Surveyor/District Engineer**
b.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT
(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER: 9.

21. TITLE AND LOCATION *(City and State)*: **V-Dana CDD, Fort Myers, Florida**

22. YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Continuing	**Continuing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
V-Dana CDD	**Brian Lamb, District Manager**	**813.873.7300**

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

BAI is currently providing District Engineer services for the V-Dana CDD. Verdana Village is a +/-2,138 acre residential development located along Corkscrew Road, east of the Alico Road intersection in unincorporated Lee County; the V-Dana CDD is comprised of +/-2,115 ares. The phased development will include 2,400 residential units.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**District Engineer**
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT *(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)*	20. EXAMPLE PROJECT KEY NUMBER
	10.

21. TITLE AND LOCATION *(City and State)*	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Blue Lake CDD, Fort Myers, Florida	**Continuing**	**Continuing**

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Blue Lake CDD	**Kathleen Meneely, SW Fla. District Mgr.**	**941.875.4195**

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

Blue Lake Community Development District consists of +/-706 acres of the overall +/-2,960 acre WildBlue Development. The community that comprises the District is known as VistaBlue. A total of 423 single family residential units are proposed to be constructed within the District over the course of three phases. The proposed public infrastructure which is considered fundable from the Bonds was estimated at $12,281,000. This project is ongoing.

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	**Barraco and Associates, Inc.**	**Fort Myers, Florida**	**Civil Engineer/Surveyor/District Engineer**
b.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

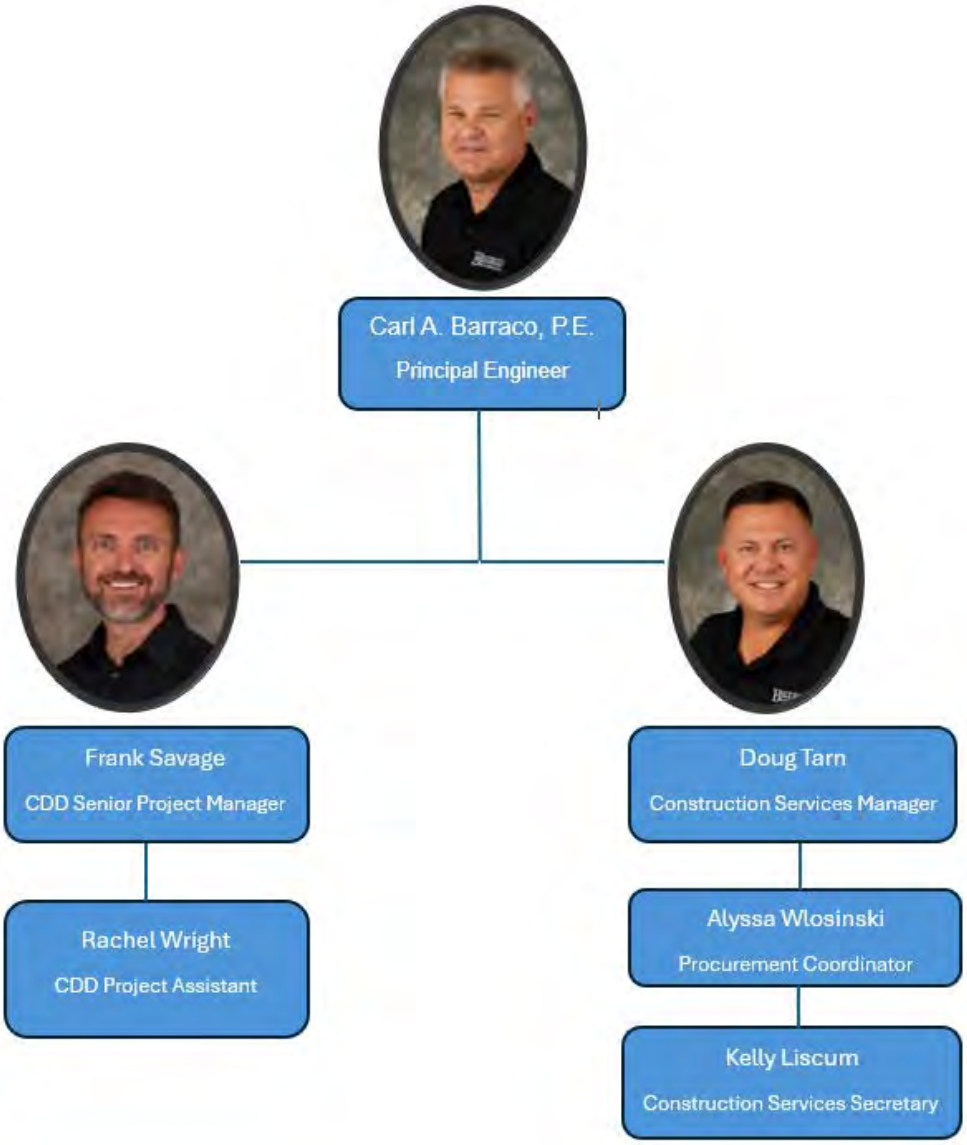
26. NAMES OF KEY PERSONNEL *(From Section E, Block 12)*	27. ROLE IN THIS CONTRACT *(From Section E, Block 13)*	28. EXAMPLE PROJECTS LISTED IN SECTION F *(Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)*									
		1	2	3	4	5	6	7	8	9	10
Carl A. Barraco, Sr., P.E.	**District Engineer**	X	X	X	X	X	X	X	X	X	X
Frank Savage	**CDD Project Manager**	X	X	X	X	X	X	X	X	X	X
Douglas Tarn	**Construction Services**	X	X	X	X		X	X			X

29. EXAMPLE PROJECTS KEY

NUMBER	TITLE OF EXAMPLE PROJECT *(From Section F)*	NUMBER	TITLE OF EXAMPLE PROJECT *(From Section F)*
1	**Corkscrew Farms CDD**	6	**Moody River Estates CDD**
2	**Bayside / Bay Creek CDD**	7	**Waterford Landing CDD**
3	**Paseo CDD**	8	**Mirada CDD**
4	**Lucaya CDD**	9	**V-Dana CDD**
5	**Catalina at Winkler Preserve CDD**	10	**Blue Lake CDD**

H. ADDITIONAL INFORMATION

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



I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE

32. DATE October 17, 2025

33. NAME AND TITLE

Carl A. Barraco, President

ARCHITECT-ENGINEER QUALIFICATIONS

1. SOLICITATION NUMBER *(If any)*: N/A

PART II - GENERAL QUALIFICATIONS

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

2a. FIRM (*or Branch Office*) NAME	Barraco and Associates, Inc.
2b. STREET	2271 McGregor Boulevard, Suite 100
2c. CITY	Fort Myers
2d. STATE	FL
2e. ZIP CODE	33901
3. YEAR ESTABLISHED	1998
4. UNIQUE ENTITY IDENTIFIER	
5. OWNERSHIP a. TYPE	Florida Corporation
b. SMALL BUSINESS STATUS	
6a. POINT OF CONTACT NAME AND TITLE	Carl A. Barraco, P.E., President
6b. TELEPHONE NUMBER	239.461.3170
6c. EMAIL ADDRESS	carlb@barraco.net
7. NAME OF FIRM *(If Block 2a is a Branch Office)*	

8a. FORMER FIRM NAME(S) *(If any)*	8b. YEAR ESTABLISHED	8c. UNIQUE ENTITY IDENTIFIER

9. EMPLOYEES BY DISCIPLINE

a. Function Code	b. Discipline	c. Number of Employees (1) FIRM	c. Number of Employees (2) BRANCH
02	Administrative	10	
08	CADD Technician/Designer	18	
12	Civil Engineer	6	
15	Construction Inspector/Observer	3	
16	Construction Manager	1	
38	Land Surveyor (PSM/Field)	15	
47	Planner	1	
48	Project Manager	5	
	Other Employees		
	Total	59	

10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS

a. Profile Code	b. Experience	c. Revenue Index Number *(see below)*
C15	Construction Management	0
C16	Construction Surveying	3
G04	Geographic Info System Svcs.	1
H07	Highways; Streets; Parking Lots	3
H11	Housing (Residential, Multi-Family	5
I06	Irrigation; Drainage	3
L02	Land Surveying	3
P05	Planning (Community, Regional)	1
P06	Planning (Site, Installation, Project)	2
S10	Surveying; Platting; Mapping; Flood	3
S13	Stormwater Handling & Facilities	2
T04	Topographic Surveying & Mapping	2
W02	Water Resources; Hydrology; GW	2
W03	Water Supply; Treatment & Distrib.	2
Z01	Zoning; Land Use Studies	2

11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS

(Insert revenue index number shown at right)

a. Federal Work	0
b. Non-Federal Work	7
c. Total Work	7

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

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

12. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

a. SIGNATURE: 

b. DATE: October 17, 2025

c. NAME AND TITLE: Carl A. Barraco, President

4Biii.

QUALIFICATIONS TO PROVIDE

NAPLES HERITAGE COMMUNITY DEVELOPMENT DISTRICT

PROFESSIONAL ENGINEERING SERVICES

OCTOBER 17, 2025



JOHNSON ENGINEERING
— An Apex Company —

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g. Volume of Work Previously Awarded to Consultant by District 21

h. SF330

JOHNSON ENGINEERING
An Apex Company

SINCE 1946

October 17, 2025

Naples Heritage Community Development District
210 N. University Drive, Suite 702
Coral Springs, FL 33071

Re: Naples Heritage Community Development District - Professional Engineering Services

Dear Supervisors:

As an experienced District Engineer to Chapter 190 Community Development Districts in South Florida, it is clear that the role of District Engineer is to provide the Board of Supervisors with unbiased, accurate engineering knowledge in common-sense language. Board members needing to make necessary fiscal decisions that impact the health and safety of current and future residents depend upon clear, timely answers on engineering related matters. We have more than seven decades of experience in Lee and Collier Counties and more than four decades with the proposed personnel that will work for Naples Heritage Community Development District (CDD). We have assisted many CDDs with the transition from developer control to community ownership, and we are ready to be your trusted and independent partner. Our project manager for this District will be Mark Zordan. He has over 40 years of experience in civil engineering working for municipal governments.

In addition to the District Engineer, you will receive the support of a team of qualified professionals with the knowledge of stormwater management, current environmental issues, transportation/ roadway/pedestrian safety and enhancement design, utility design, landscape design and construction management/observation along with current permitting requirements in order to efficiently maintain or expand the District's services that are being provided to its residents. Our team is known for providing outstanding service as well as always being mindful of our client's time and budgetary needs. Our clients find that our vast experience and dedication to professionalism bring success to their projects. Please see our CDD list below:

- Arbor Greene CDD
- Bayside Improvement CDD (Pelican Landing)
- Bay Creek CDD (Pelican Landing)
- Beach Road Golf Estates CDD
- Bella Vida CDD
- Cory Lakes CDD
- CFM CDD (Magnolia Landing)
- Cypress Preserve CDD
- Cypress Shadows CDD
- Forest Creek CDD
- Gateway Services CDD
- Highlands CDD
- La Collina CDD
- Longleaf CDD
- Long Lake Ranch CDD
- Mediterra CDD
- Miromar Lakes CDD
- Parklands Lee CDD
- Parklands West CDD
- Park Place CDD
- Pelican Marsh CDD
- Pine Air Lakes CDD
- Portico CDD
- Riverbend West CDD
- River Ridge CDD
- Sail Harbour CDD
- Spring Lake CDD
- Stoneybrook CDD
- Suncoast CDD
- Terra Bella CDD
- The Brooks II of Bonita Springs CDD
- The Brooks of Bonita Springs CDD
- University Square CDD
- University Village CDD
- Verandah East CDD
- Verandah West CDD
- Walnut Creek CDD
- Watergrass I CDD
- Water's Edge CDD
- Wentworth Estates CDD (Treviso Bay)

We appreciate the opportunity to submit our qualifications and look forward to the opportunity to build our relationship with the Naples Heritage Community Development District. Please do not hesitate to contact me should you have any questions during your review of our proposal.

Sincerely,
JOHNSON ENGINEERING, LLC

Mark Zordan

Mark Zordan, PMP, Project Manager
(239) 461-2474, maz@johnsoneng.com

a. Ability & Adequacy of Professional Personnel



JOHNSON
ENGINEERING
— An Apex Company —

a. ABILITY & ADEQUACY OF PROFESSIONAL PERSONNEL



Depth of Experience

Centuries of combined experience has immersed our team of licensed professionals into Florida's geography, giving a rare perspective into development of the area and an appreciation of the changes.

Full Range of Services

Specialized teams of licensed engineers, land planners, landscape architects, surveyors, ecologists, water resources experts, transportation and utility designers provide a variety of specialized services.

Long Term Commitment

Our team's average tenure with Johnson Engineering is 13 years, 53% of our employees have been here for more than 10 years, and an unprecedented 21% have been with us for more than 20 years, showing our team's continuity and dedication to the area.

Firm Overview

When Johnson Engineering was established in 1946, much of Florida was an undisturbed land. More than 79 years later we have seen booms in development and a tremendous population growth alter the landscape permanently. We have been assisting private companies, city, county, federal, and state government through these changes and challenges by offering expertise in a broad spectrum of disciplines.

Just as Florida has transformed dramatically over the years, so has Johnson Engineering. What started as one man surveying Southwest Florida, has developed into a cohesive team of more than 130 professional civil engineers, ecologists, scientists, geologists, surveyors and mappers, certified land planners and landscape architects, located throughout Florida.

We have more than 79 years of professional experience and 49 years of District work throughout Florida. Our extensive list of well-known residential communities, roads, schools, hospitals, airports, resorts, shopping centers, and commercial developments, show our experience and continued responsibility in developing Florida's communities.

Our team has worked closely together on the following CDD's.

- Arbor Greene CDD
- Bayside Improvement CDD (Pelican Landing)
- Bay Creek CDD (Pelican Landing)
- Beach Road Golf Estates CDD
- Bella Vida CDD
- Cory Lakes CDD
- CFM CDD (Magnolia Landing)
- Cypress Preserve CDD
- Cypress Shadows CDD
- Forest Creek CDD
- Gateway Services CDD
- Highlands CDD
- La Collina CDD
- Longleaf CDD
- Long Lake Ranch CDD
- Mediterra CDD
- Miromar Lakes CDD
- Parklands Lee CDD
- Parklands West CDD
- Park Place CDD
- Pelican Marsh CDD
- Pine Air Lakes CDD
- Portico CDD
- Riverbend West CDD
- River Ridge CDD
- Sail Harbour CDD
- Spring Lake CDD
- Stoneybrook CDD
- Suncoast CDD
- Terra Bella CDD
- The Brooks II of Bonita Springs CDD
- The Brooks of Bonita Springs CDD
- University Square CDD
- University Village CDD
- Verandah East CDD
- Verandah West CDD
- Walnut Creek CDD
- Watergrass I CDD
- Water's Edge CDD
- Wentworth Estates CDD (Treviso Bay)

CAPABILITIES SUMMARY

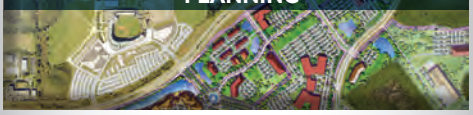
We have an experienced team of professionals located throughout Florida., many of whom have considerable Special District experience. Our extensive list of well-known Florida Special District's, residential communities, roads, schools, hospitals, airports, shopping centers, resorts and commercial developments show our continued responsibility in developing Florida's communities.

LAND DEVELOPMENT



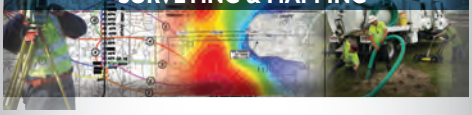
Project Management / Coordination • Due Diligence
Site Design • Cost Estimation • Permitting
Construction Observation & Administration
Single Family Communities • Multi-Family Residential
Assisted Living • Commercial • Industrial • Medical
Institutional • Educational • Recreational

PLANNING



Feasibility & Assessment Studies • Master Planning &
Urban Design • Neighborhood & Sector Planning
Comprehensive Planning & Zoning • Facility Planning
Corridor Planning • Local Government Planning
Public Engagement • GIS Services
Code Writing Redevelopment Planning

SURVEYING & MAPPING



Subsurface Utility Engineering & Mapping (SUE)
Hydrographic Surveying • Transportation Surveying
Bathymetric Surveying • ALTA Surveys
Boundary Surveys • Construction Layout
Platting • Record Surveys
Sketches and Legal Descriptions

ECOLOGICAL/ENVIRONMENTAL CONSULTING



Wetland Delineation, Assessments & Permitting
Protected Species Surveys, Permitting & Relocations
Mitigation Design & Monitoring
Marine & Coastal Environmental Services
Airport Wildlife Hazard Services
Drone Services
Geographic Information Systems

STORMWATER MANAGEMENT



Surface Water Master Planning • Surface Water
Retrofit • BMP Selection and Design
Hydrologic, Hydraulic & Water Quality Modeling
Federal, State and Local Surface Water Permitting
Flow & Stage Monitoring • Water Quality Treatment
Special Governments • Filter Marsh Design

WATER QUALITY STUDIES



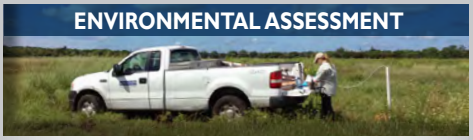
Stormwater/Surface Water Quality Studies
Groundwater Quality Studies • Estuarine/Coastal
Water Quality Studies • Subaqueous Sediment
Characterization • TMDL Pollutant Loading
Determination • EPA Section 319 and FDEP SWAG
Assistance • Microbial Source Tracking • Quality
Assurance Project Plan • Non-point Source Evaluation

WATER SUPPLY



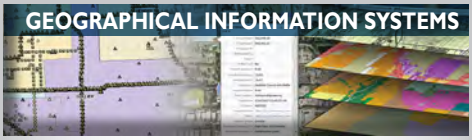
Hydrogeological Investigations
Water Resource Assessments • Water Use, Water
Supply System Permitting • Well & Wellfield Design
Regional Water Supply Planning
Groundwater Modeling • Deep Injection Wells
Alternative Water Supplies Studies

ENVIRONMENTAL ASSESSMENT



Phase I Environmental Site Assessments (ESAs)
Phase II Environmental Site Assessments (ESAs)
NPDES Compliance Monitoring
Permit Compliance Monitoring and Reporting
Filter Marsh Efficiency Evaluation
Water Use Accounting Method Calibration
BMAP Nutrient Removal Project Assessment

GEOGRAPHICAL INFORMATION SYSTEMS



ESRI-based GIS Services • Mobile Online Map
(ArcGIS Online) • Custom Client Online Map Services
Geodatabase Development and Implementation
CAD-GIS-DGN Conversions • High Accuracy GNSS
(GPS) Data Collection • Advanced Modelbuilder
& Python Scripting • LiDAR Derivative Products
Cartographic Visualization • Aerial Photo Processing

TRANSPORTATION DESIGN



Roadway Design • Signalization Design
Resurfacing, Rehabilitation and Restoration
Street Lighting Design • Traffic Analyses
Roundabout Design • Signalization Design
Corridor Planning • Bicycle, Transit,
and Pedestrian Facilities

CONSTRUCTION ENGINEERING & INSPECTION



Roadway Construction
Bridge Construction
Roadway Resurfacing Rehabilitation Restoration
Major Drainage Structures Construction
Private Development Construction Assistance
Grant Funded Construction Oversight / Compliance

LANDSCAPE ARCHITECTURE



Landscape/Hardscape/Irrigation Design • Conceptual
Design • Commercial Design • Community
Revitalization & Amenity Design • Streetscape Design
Park Design • Visualization & Graphic Design
Construction Documents & Observation
Arboricultural Consulting Services • Plan Review
Services • Community/Institutional/Hospitality Design

UTILITIES



Utility Planning • Subsurface Utility Engineering (SUE)
Data Collection & Analysis • Hydraulic Modeling
Pipeline Design • Pump Station Design,
Evaluation, and Operational Controls
Utility Permitting • Project Management CEI

ELECTRICAL ENGINEERING (EI&C)



Switchgear, Motor Control Centers, and Generators
Power Distribution Equipment • Lighting
Process & Industrial Control
Systems Integration and Commissioning
Electrical Systems Analysis (Short Circuit and
Protective Coordination)
SCADA Architecture, Networking & Telemetry

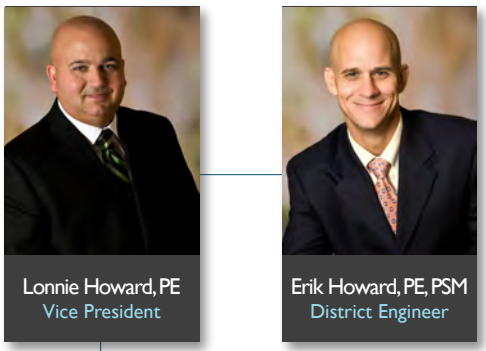
SPECIAL DISTRICT ASSISTANCE



Stormwater Management • Water Use
Environmental • Planning
Landscape Architecture
Surveying & Mapping • Utilities
Roadway/Traffic Studies
Geographic Information Systems (GIS)
Construction Engineering & Inspection (CEI)

ORGANIZATIONAL STRUCTURE

Johnson Engineering is a corporation and is comprised of seven specialized market groups. Each market group is led by a key officer whose job is to provide beneficial decision making for the company and integrate these decisions with the other market groups.



Lonnie Howard, PE
Vice President

Erik Howard, PE, PSM
District Engineer



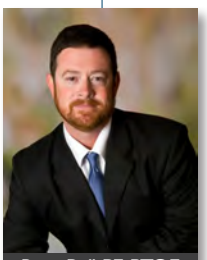
Laura DeJohn, AICP
Director of Planning & Landscape Architecture Services



Michael Dickey, PE
Director of Utilities Services



Laura Herrero
Director of Water Resources & Environmental Services



Ryan Bell, PE, PTOE
Director of Transportation Services



Kavin RisCassi, PSM
Director of Surveying & Mapping Services



Tyler Sharpe, PE
Director of Development Services



Jeff Nagle, RLA
Director of Landscape Architecture Services



David Trouteaud, PE
Utilities Project Manager

- Surface Water Resources
- Groundwater Resources
- Water Quality



James "Vee" Lofton
Director of CEI Services

- Subsurface Utility Engineering (SUE)
- Hydrographic Surveying
- Geographic Information Systems (GIS)

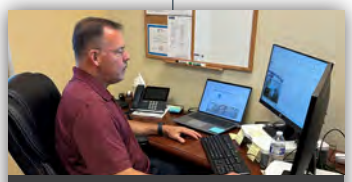
ASSIGNED TEAM ORGANIZATIONAL CHART

Below is our proposed team we have hand selected to best serve the needs of the CDD. Our team is available and ready to start immediately.

Naples Heritage Community Development District



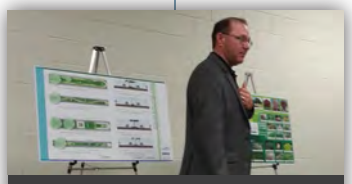
District Engineer
Erik Howard, PE, PSM



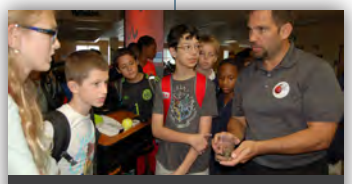
Project Manager
Mark Zordan, PMP



Water Management
Alfredo Perez, PE, PSM



Landscape Architecture
Jeff Nagle, RLA



Environmental
Gary Nychyk



Water Use
Alec Piironen, PG

Additional Resources

Survey & Mapping
Kevin RisCassi, PSM

GIS
Marina Guirguis

Utilities
Billy Saum, PE

Roadways/Traffic Studies
Josh Hildebrand, PE, PTOE

Planning
Laura DeJohn, AICP

CEI
James "Vee" Lofton

TEAM BIOS



Erik Howard, PE, PSM - District Engineer

Erik joined Johnson Engineering in 2003. As an engineer, surveyor, general contractor, plumbing contractor and electrical contractor, he is familiar with both the technical and construction side of projects. Erik's experience as an engineer includes groundwater modeling, hydraulic pipe modeling, data analysis, utility design, directional drill layout and design, well design, pump station design, treatment facility design, stormwater design, permitting, certification and construction administration. He routinely prepares specialized plans and specifications for projects that require an 'out-of-the-box' approach. Erik's technical background and practical experience allows him to handle most any unique circumstance.



Mark Zordan, PMP - Project Manager

Mark joined Johnson Engineering's Water Resources team as a project manager in 2024. He brings 43 years of experience as a project manager working on stormwater, roadway, sidewalk, and utility projects. His 38-year career in Connecticut included job functions as a construction inspector, engineering assistant, and superintendent of engineering. In these roles, he managed large and diverse federal, state, and local infrastructure projects that included reconstruction of stormwater systems, roads, bridges, sanitary sewers, and sidewalks. Mark gained a wide variety of engineering skills and knowledge in many different areas of design, regulatory permitting, document preparation, contract administration, construction inspection, and project management.



Alfredo Perez, PE, PSM - Water Management

Alfredo has 28 years of experience. Alfredo works on a variety of projects entailing various disciplines of engineering which include groundwater, utilities, surface water, construction inspection, report writing, and field data collection. Alfredo is currently more involved in the water resources discipline assisting with environmental resource permitting and surface water management systems. However, he continues to aid in other areas of engineering which consist of surveying and mapping, plan production/ QAQC, and preparing project specifications.



Jeff Nagle, RLA - Landscape Architecture

Jeff joined Johnson Engineering in 2012 as a principal landscape architect. Jeff brings a versatile skill set and a reputation built on providing the highest quality of service to both public and private sector clients, including CDDs, with on-time and on-budget deliverables. Having worked in both the public and private sector, Jeff brings a broad range of experience to apply in practice, using an innovative management approach to guide projects from the planning and design phase, through permitting, development and construction. Jeff's specialties include master planning, parks and recreation, streetscapes, roadway, environmental reclamation and mitigation, low impact development, and lighting design.



Gary Nychyk - Environmental

Gary is an ecologist whose primary focus is on vegetation mapping, wildlife surveys, protected species management plans, wetland jurisdictional determinations, and wetland mitigation monitoring. He is an Authorized Gopher Tortoise Agent and maintains 11 ultrasonic acoustic recorders used to survey for the endangered Florida bonneted bat. He also conducts Stormwater Pollution Prevention Plan and Spill Prevention Control and Countermeasures annual site compliance evaluations and training events at Southwest Florida International Airport and Page Field General Aviation Airport. He works closely with the USACE, the SFWMD, FDEP, FDEM, FWC, USFWS as well as local city and county agencies.



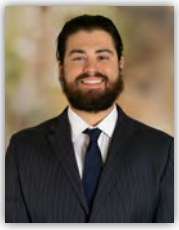
Alec Piironen, PG - Water Use

Alec joined Johnson Engineering in 2022 and is a hydrogeologist in the company's water resources group. He is responsible for performing hydrogeologic investigations, water resource assessments, aquifer performance testing, support in hydrologic monitoring program development efforts, and water management district water use and Florida Department of Environmental Protection (FDEP) permitting. Additionally, Alec joined Johnson Engineering with a combined six years of experience working as a geologist/engineering technician with other Environmental Consulting Firms, where he worked on a variety of landfill construction and monitoring, contaminate investigation and remediation, and environmental compliance projects.



Kevin RisCassi, PSM - Survey & Mapping

Kevin has 33 years of experience successfully providing both residential and commercial clients with control, boundary, topographic, route, and hydrographic surveys, as well as right of way mapping on transmission lines, and construction staking. He has also been developing our subsurface utility engineering (SUE) services. He helped in the design and acquisition our current Vac-Truck which we added to our fleet in 2007 along with our Ground Penetrating Radar equipment. He has managed several projects for Florida Power and Light, Lee County Electric Co-Op, Fort Myers Utilities, Charlotte County Utilities, Collier County Utilities and private contractors in design and as-built phases with required subsurface utility deliverables.



Billy Saum, PE - Utilities

Billy has been with Johnson Engineering since 2015. He is a professional engineer and project manager for utility related projects. Billy has experience in project management, pump station and pipeline design, FDOT utility coordination and adjustments, hydraulic modeling and calculations, pump selecting, construction administration, plan production, and permitting for clients throughout South Florida. Billy also has extensive experience in pump station data collection and performance analysis for hundreds of pump stations in South Florida. Recently, he has designed and managed various pump station rehabilitation and emergency power resiliency projects for municipal wastewater systems. While most of his experience thus far has been with municipal projects, he has completed various assignments for commercial and residential projects as well.



Josh Hildebrand, PE, PTOE - Transportation

In 2007, Josh began his professional career and has since served as a team member in the transportation services division at Johnson Engineering. He has worked on various projects throughout Southwest Florida and is familiar with traffic studies, supervision of traffic data collection,roadway design, pathway design, construction, and the permitting procedures of the local municipalities. Josh has worked on 100+ traffic / construction feasibility-related engineering studies, roadway and drainage design projects within public right-of-way. This experience provides him with a unique understanding of the development of corridor and intersection design, parking demand, traffic generation, ADA compliance-related challenges, and the permitting requirements on both private and public capital improvement projects.



Laura DeJohn, AICP - Planning

A Certified Planner since 2001, Laura has more than 27 years of professional experience in both public and private sector planning, including five years as a planner for the City of Naples. As Johnson Engineering's Director of Planning & Landscape Architecture, Laura manages projects involving development feasibility studies and site assessments, monitoring reports, code writing, preparation and presentation of land use and zoning applications, site design, master planning, and community visioning. Her experience includes entitlement of new development and redevelopment projects; architectural design review; annexation; and incentive-based codes. She has presented for the American Institute of Architects of Southwest Florida, FGCU, and the Florida Chapter of the American Planning Association, and is an appointed member of the Collier County Development Services Advisory Committee.



Marina Guirguis - Geographic Information Systems (GIS)

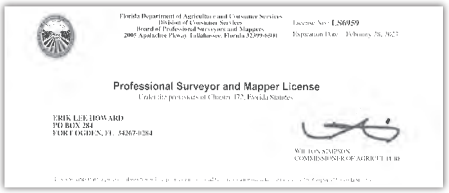
Marina joined Johnson Engineering in 2017. Her current projects include work in geographic information system (GIS), development projections, drafting, mapping, corridor analysis, research, site planning and design, public meetings, graphic design and rendering. Marina holds a Master of Design in Sustainable Urban Environments from Northeastern University.

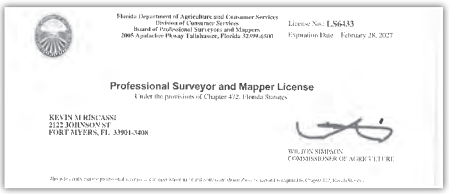


James "Vee" Lofton - CEI

Vee is director of the construction engineering & inspection (CEI) team. He has more than 37 years of experience in roadway and bridge construction, project administration, and inspection in both traditional design-bid-build and design-build. His extensive experience also includes interstate highways and bridges, pile driving, earthwork, sub grade and base construction, asphalt paving, drainage items, and all types of utilities and related relocations. He specializes in document control for both quality assurance and quality control testing. His previous experience as a consultant program manager with the Florida Department of Transportation (FDOT) gives him a unique perspective of the bidding process, construction techniques utilized, as well as an understanding of the maintaining agency's needs.

BUSINESS & PROFESSIONAL LICENSES/ CERTIFICATIONS


Professional Surveyor and Mapper License


Professional Surveyor and Mapper License

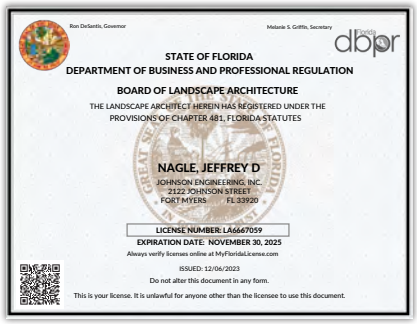

THE AMERICAN INSTITUTE OF CERTIFIED PLANNERS

LAURA KATHARINE SPURGEON

Member

July 1, 2001

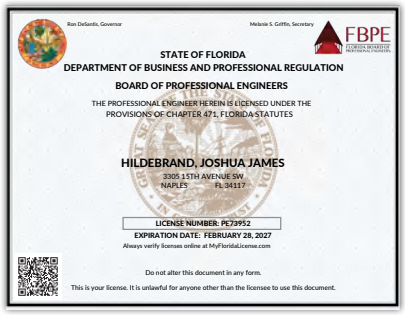

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL ENGINEERS
HOWARD, ERIK LEE
LICENSE NUMBER: PE66574
EXPIRATION DATE: FEBRUARY 28, 2027

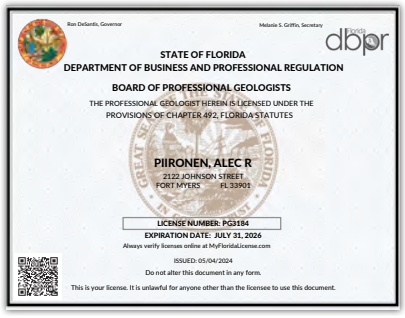

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF LANDSCAPE ARCHITECTURE
NAGLE, JEFFREY D
LICENSE NUMBER: LA6667059
EXPIRATION DATE: NOVEMBER 30, 2025


STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL ENGINEERS
PEREZ, ALFREDO
LICENSE NUMBER: PE84310
EXPIRATION DATE: FEBRUARY 28, 2027


STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL ENGINEERS
SAUM, WILLIAM HURRICANE
LICENSE NUMBER: PE88659
EXPIRATION DATE: FEBRUARY 28, 2027


Transportation Professional Certification Board Inc.
Joshua James Hildebrand
PROFESSIONAL TRAFFIC OPERATIONS ENGINEER
November 20 2013


STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL ENGINEERS
HILDEBRAND, JOSHUA JAMES
LICENSE NUMBER: PE73952
EXPIRATION DATE: FEBRUARY 28, 2027


STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL GEOLOGISTS
PIIRONEN, ALEC R
LICENSE NUMBER: PG3184
EXPIRATION DATE: JULY 31, 2026

b. Certified Minority Business Enterprise



JOHNSON
ENGINEERING
— An Apex Company —

FLORIDA DEPARTMENT of MANAGEMENT SERVICES
office of supplier DIVERSITY
We serve those who serve Florida

Johnson Engineering is not a certified minority business. However, we take great pride in being an equal opportunity employer. **We are committed to promoting other MBEs.** Our goal is to establish a team in the best interest of our clients, while maintaining the standard of quality our firm and clients demand.

Once selected, we will work closely with the CDD to identify other potential minority teaming opportunities.

Equal Opportunity/Affirmative Action Employer

Johnson Engineering is an Equal Employment Opportunity and Affirmative Action Employer and seeks to recruit qualified women, qualified minorities, qualified individuals with disabilities and qualified protected veterans. It is the policy of Johnson Engineering not to discriminate against any employee or applicant for employment based on race, gender, age, disability or national origin or because he or she is a qualified individual with a disability, a disabled veteran, a newly separated veteran, a campaign veteran or an armed forces service medal veteran.

c. Willingness to Meet Time & Budget



JOHNSON
ENGINEERING
— An Apex Company —

WILLINGNESS TO MEET TIME & BUDGET

As noted in our organizational chart, Erik Howard, PE, PSM will be the District Engineer for this CDD if Johnson Engineering is selected. Support will also be provided by Mark Zordan, PMP, Alfredo Perez, PE, PSM, Gary Nychyk, CE, and Jeff Nagle, RLA, to name a few.

Gary Nychyk has helped many special districts navigate environmental issues and Jeff Nagle has assisted in landscape enhancements throughout Florida. Alfredo Perez and Mark Zordan have assisted on many of the CDDs undertaking pond/lake inspections, drainage system inspections, roadway and sidewalk assessments, and construction observation.

Additionally, we have a staff of more than 130 to assist whenever needed.

The growth of Johnson Engineering's Special District clientele is a testament to the past performance we have provided and will continue to provide to the respective Districts we serve. Many of the Districts are managed by the same management company as well as the same District Manager indicating a trust in our abilities to perform when needed.

As you can see, we have an established track record of successfully providing district engineering services locally to multiple community development districts over the last decade and a half.

Per the Consultants Competitive Negotiations Act, fees are not part of the qualifications review. However, if selected, Johnson Engineering will submit its standard hourly rates to the District for discussion as part of the contract negotiation process.



d. Past Performance



JOHNSON
ENGINEERING
— An Apex Company —

PREVIOUS CDD DISTRICT ENGINEER EXPERIENCE & REFERENCES

RIVERWOOD CDD

District Engineer

Inframark
Mr. Robert Koncar
5911 Country Lakes Drive
Fort Myers, FL 33905
(904) 626-0593
Bob.Koncar@inframark.com



Johnson Engineering is one of two firms providing engineering services for this district. Our focus is on water management, environmental, road, and landscape needs with the other firm focused on the utility plants operated by the District. The District has several water management permits, which we are assisting with budgeting to meet permit requirements.

SARASOTA NATIONAL CDD

District Engineer

Wrathell, Hunt & Associates
Mr. Chuck Adams
9220 Bonita Beach Road,
Suite 214
Bonita Springs, FL 34135
(239) 498-9020
adamsc@whhassociates.com



The Sarasota National CDD encompasses an area of approximately 2,400+ acres in unincorporated Sarasota County, Florida and is generally located south of U.S. 41 and east of Jacaranda Blvd in Venice, FL. Infrastructure consists of public roadways, storm water management, potable water, wastewater, irrigation and reuse, landscaping, environmental facilities, and off-site improvements. The Sarasota National CDD is a local, special-purpose government entity authorized by Chapter 190 of the Florida Statutes as amended, and was established on November 1, 2006.

THE BROOKS OF BONITA SPRINGS CDD

District Engineer

Wrathell, Hunt & Associates
Mr. Chuck Adams
9220 Bonita Beach Road,
Suite 214
Bonita Springs, FL 34135
(239) 498-9020
adamsc@whhassociates.com



Johnson Engineering is the District Engineer for The Brooks of Bonita Springs CDD in South Lee County, Florida. Our team provides professional engineering services, including establishment, reports for bonds, assisting during the construction and development process, as well as during the operation and maintenance of the CDD.

VERANDAH WEST CDD

District Engineer

Wrathell, Hunt & Associates
Mr. Chuck Adams
9220 Bonita Beach Road,
Suite 214
Bonita Springs, FL 34135
(239) 498-9020
adamsc@whhassociates.com



Johnson Engineering prepared the original Engineer's Report and amendments along with the other items in the community. During construction, portions of the community assets were reviewed by our team prior to acquisition by the CDD. This included review of construction documents, onsite testing and certifications to the regulatory agencies. We also helped with delineation of conservation areas and private lands within the District for the division of maintenance responsibilities.

MEDITERRA
District Engineer

Wrathell, Hunt & Associates
Mr. Chuck Adams
9220 Bonita Beach Road,
Suite 214
Bonita Springs, FL 34135
(239) 498-9020
adamsc@whhassociates.com



Johnson Engineering has been the District Engineer at Mediterra since 2002. Work has included pay request review for release of bond funds, stormwater pond evaluations, fire safety related to naturally vegetated areas, and littoral vegetation maintenance.

PELICAN MARSH CDD
District Engineer

Dorrill Management Group
Mr. W. Neil Dorrill
5672 Strand Court, Suite 1
Naples, FL 34110
(239) 592-9115
nsdorrill@aol.com



Johnson Engineering has provided general engineering services for the Pelican Marsh CDD in North Collier County, Florida since 2002. The services we have provided the District include reviewing the stormwater system when flooding has occurred throughout the community, reviewing offsite impacts of existing and proposed facilities affecting the stormwater system and assisting with improving the access control facilities, and reviewing roadway signage and sight distance issues. In 2017, the community began a multi-year roadway paving project of the main CDD roads. Our transportation group provided a pavement condition report and Construction, Engineering, and Inspection (CEI) services during the project to monitor contractor performance and verify invoicing quantities.

CORY LAKES CDD
District Engineer

Mr. Larry Krause
1540 International Parkway
Suite 2000
Lake Mary, FL 32746
(813) 565-4663



Johnson Engineering is the District Engineer for the Cory Lakes Community Development District. This District has an extensive stormwater system consisting of several interconnected lakes and wetlands. Our work has included assisting the District to replace large concrete stormwater structures that were in desperate need of repair as well as assisting with general maintenance issues related to failing inlets, pipes and drainage ditches. Other services have included ADA surveys, new concrete sidewalks and assistance with concrete bridge repairs.

CYPRESS SHADOWS CDD
District Engineer

Inframark
Mr. Justin Faircloth
2005 Pan Am Circle Ste 300
Tampa, Florida 33607
(239) 785-0675
justin.faircloth@inframark.com



Johnson Engineering began providing professional engineering services for the Cypress Shadows CDD following a request for qualifications in 2020, a few years after it transferred to a resident-majority board. Our work commenced with research into the existing permits, plans, plats, and related documents which were used to develop a tabular listing and multiple maps that identified the areas of the community owned and operated by the CDD. We may also provide general engineering services for the CDD, including preparation of reports, meeting attendance, reports for bonds, feasibility studies, and assistance during construction.

PARK PLACE CDD
District Engineer

Inframark
Mr. Gene Roberts
2005 Pan Am Circle Ste 300
Tampa, Florida 33607
(813) 873-7300 ext 116
gene.roberts@inframark.com



As District Engineer for the Park Place CDD, Johnson Engineering has provided general engineering services related to traffic calming, roadway repairs and improvements (asphalt and brick pavers), ADA compliance, vendor/contractor selection and oversight, parking assessments and inspection of stormwater detention ponds as well as a other professional services on an as-needed basis. By closely coordinating with the District Manager and communicating effectively with the Board, we have been able to assist the District in maintaining its infrastructure at an acceptable level.

PINE AIR LAKES CDD
District Engineer

Governmental Mgmt. Services
Mr. Rich Hans
5701 North Pine Island Road,
Suite 370
Fort Lauderdale, FL 33321
(954) 721-8681
rhans@govmgtsvc.com



Johnson Engineering provides professional engineering services for Pine Air Lakes Community Development District located in Collier County, Florida. The work includes establishment, reports for bonds, assisting during the construction and development process, as well as during the operation and maintenance of the CDD. Our environmental team is currently providing preserve maintenance by overseeing exotic vegetation maintenance events.

LAKESIDE PLANTATION CDD
District Engineer

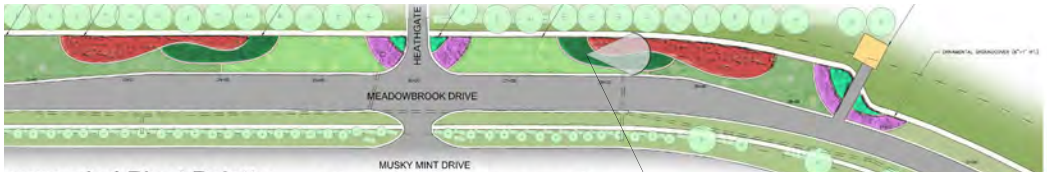
Governmental Management
Services - Central Florida, LLC
Mr. George Flint
135 West Central Blvd, Suite 320
Orlando, FL 32801
(407) 841-5524
gflint@gmscfl.com



Johnson Engineering provides professional engineering services for Lakeside Plantation Community Development District. We service as District Engineer in the areas of stormwater management, environmental issues, transportation/roadway issues, utility design, landscape design, and construction management and observation, along with current permitting requirements in order to efficiently maintain or expand the District's services that are being provided to its residents.

SUNCOAST CDD
District Engineer

Inframark
Ms. Jayna Cooper
2654 Cypress Ridge Blvd., Ste 101
Wesley Chapel, FL 33544
(813) 608-8242
jayna.cooper@inframark.com



Johnson Engineering was selected to provide professional engineering services for the Suncoast Community Development District in Pasco County, Florida in August 2013. Our work has included inspection of stormwater detention ponds (for SWFWMD Certification), review of and recommendations pertaining to contractor proposals, facilitating discussions between the Board of Supervisors and County staff, identifying and reporting roadway structural issues and responding to resident inquiries. Our landscape team designed the replacement of existing turf grass within the County ROW along the community's main entry road with a Florida Friendly and aesthetically pleasing landscape treatment. The design required consideration of the roadway landscape restrictions which limited the plant selections to grasses and groundcover to avoid frangibility concerns of trees within the roadway corridor.

LONGLEAF CDD

District Engineer

Inframark
Ms. Jayna Cooper
2654 Cypress Ridge Blvd., Ste 101
Wesley Chapel, FL 33544
(813) 608-8242
jayna.cooper@inframark.com



Johnson Engineering has provided professional engineering services for the Longleaf Community Development District in Pasco County, Florida since 2009. The work includes establishment, reports for bonds, processing National Pollutant Discharge Elimination System (NPDES) permit compliance, assisting during the construction and development process, as well as during the operation and maintenance of the CDD. Additional services have included sidewalk/ADA surveys, resolution of trip hazards as a result of tree roots, solving drainage issues, pavement condition surveys, construction administration and observation, and regular communication with District Staff.

FOREST CREEK CDD

District Engineer

Inframark
Mr. Andrew Mendenhall
2654 Cypress Ridge Blvd. Suite 101
Wesley Chapel, FL 33544
(813) 991-4014
andy.mendenhall@inframark.com



Johnson Engineering provides general engineering services to the Forest Creek Community Development District. As District Engineer, we have assisted the District with its needs in the areas of stormwater management, environmental issues, transportation/roadway issues, survey, project bidding and construction observation as well as any additional services on an as-needed basis. Projects have included, but were not limited to, sidewalk repairs, roadway repaving, review of vegetative growth in conservation/preservation areas and permit research.

CDD CLIENT REFERENCES

Meritus Districts

5680 W. CYPRESS STREET
SUITE A
TAMPA, FL 33607

T: 813-397-5120
F: 813-873-7070
WWW.MERITUSDISTRICTS.COM

Subject: Johnson Engineering, Inc.

To Whom It May Concern:

We have worked with Johnson Engineering, Inc. in their capacity as District Engineer for nearly a decade. They are responsive to the needs of the community by working diligently with the Board of Supervisors through our management office and in conjunction with District Counsel. Their firm provides a broad spectrum of services which allows them to do most projects without outside assistance.

They assign a project manager to the Community Development District and then, through that person, bring in other team members as needed. Johnson Engineering has in-house expertise to accomplish groundwater management, surface water management, environmental, transportation, landscape architecture, planning, utilities, surveying and site civil work.

They are a firm that we continually look forward to working with.

Sincerely,
MERITUS DISTRICTS

Brian K. Lamb
Chief Executive Officer
5680 W. Cypress Street, Suite A
Tampa, Florida 33607
(813) 397-5120

"SYNONYMOUS WITH COMMUNITY SE

W&H A

Wrathell, Hart, Hunt and Associates, LLC
Building client relationships one step at a time...

Subject: Johnson Engineering, Inc.

To Whom It May Concern:

I have worked with Johnson Engineering, Inc. in their capacity as District Engineer for 17 years. They are responsive to the needs of the community by working diligently for the Board of Supervisors through our management office and in conjunction with the District Attorney. Their firm has a broad spectrum of services, which allow them to do most projects without the need for outside assistance.

They assign a project manager to the Community Development District and then, through that person, bring in other team members as needed. Johnsons Engineering has in-house expertise to accomplish ground water management, surface water management, environmental, transportation, landscape architecture, planning, utilities, surveying and site civil work.

We look forward to working with them on additional projects in the future.

Sincerely,

Chesley E. Adams jr.
Director of Operations

APPROACH & IMPROVEMENT RECOMMENDATIONS



Special District Experience

Our team has extensive Special Districts Experience (CDDs/CIDs) experience throughout Florida, as we are the District Engineer for many Special Districts. The work includes establishment, reports for bonds, and assistance during the construction and development process as well as ongoing services during the operation and maintenance of the District. During the construction and development process, we prepare the Engineer's Reports and amendments when needed, and review and approve requisitions from bond proceeds. After the work is complete or largely complete by the original developer, we participate in the long-term operation and maintenance with through facilities modifications, GATSB 34, upgrades to irrigation and maintenance facilities, as well as modifications to the water management system. We have assisted, and are currently assisting, Districts with sidewalk/ADA assessments, traffic signage and pavement marking surveys, ownership mapping, pavement condition assessments, drainage issue resolution, pond and wetland inspections, road resurfacing, and other improvement projects. We have also developed a Permit Criteria Manual to be used for new phases of development within the District limits of one of our clients.

On a regular basis (sometimes monthly), we survey our existing CID/CDD/HOA communities and provide a report to the District Manager identifying any safety or infrastructure concerns. Our reports have included photos and descriptions of lifted and/or cracked sidewalks (sometimes because of tree roots) related to ADA non-compliance, areas of ponding, slope erosion/failure, locations of faded traffic signs or pavement markings and locations of pavement failure. Solutions have included chemical grout injection to address sidewalk trip hazards, saving our clients time and money (we were able to address 10 times the number of trip hazard locations using this method verses the traditional sidewalk removal and replacement method for the same amount of money, freeing up funds for other projects). Root barriers have also been implemented in addressing the sidewalk locations being affected by tree roots. Our experience has shown that some issues can be resolved quickly and with minimal disruption to a community's residents by pursuing alternatives to construction.

Stormwater Management Systems

Hundreds of stormwater management facilities in communities throughout Southwest Florida bear the professional seal of our staff. The members of our surface water management team of professionals have experience in everything from county-level surface water master planning to stormwater facility design for small businesses. Some of the most exciting projects come out of stormwater retrofits of existing communities, which can be some of the most challenging and complex. Many times, it is not physically or financially feasible to completely fix an existing problem. Our team of surface water professionals understand this and work with our clients and interested third parties to come up with the best financially-feasible solution. Water quality is now in the forefront of all retrofit projects. The flooding and water quality problems must be solved simultaneously even though their solutions often work at odds to each other. Our experience and understanding of the local hydraulics and hydrology of Collier and Lee Counties and surface water BMPs helps us solve both problems with one solution.





Transportation

Our transportation team has assisted other local CID/CDDs/HOAs with their roadway maintenance issues by communicating solutions promptly as if they had their very own Public Works department. With more than 15 employees supporting him within our transportation market group, we are experienced in a wide of array of roadway design and construction inspection services. We are familiar with the requirements and operating procedures of many municipalities in Florida including the FDOT. We are also experienced in all manners of permitting associated with transportation improvements including FDOT pre-qualifications in the following areas: 3.1, 3.2, 6.1, 7.1, 7.2, 7.3, 8.1, 8.2, 8.4, 10.1, 10.4, 13.6, 15.

Our design services range from sidewalk ADA compliance reviews, corridor analyses, preliminary design studies, and intersection improvements to full scale major roadway design. Roadway design is intricately correlated with the adjacent development, drainage, utilities, and environment. With in-house expertise in these areas as well, we offer a comprehensive design and permitting service. We also have long standing relationships with proven consultants in the transportation sub-disciplines of traffic, lighting, and signalization. These relationships perfectly complement our core design, providing a complete and quality design product.

Our transportation group also offers construction engineering and inspection (CEI). With 10 FDOT certified roadway and utility construction inspectors, we have the means to make sure the design is constructed properly. Our inspection staff is also well versed in the construction and acceptance criteria of the local municipalities. On-site inspection is critical to ensure compliance not only with the plans, but with the specifications and contract documents. Inspection is often required in cases where improvements are to be turned over to a local municipality for maintenance. Our local experience and thorough expertise in all manners of transportation improvement projects will ensure a quality product is delivered in an efficient manner, from conception to completion.



Environmental Monitoring Experience

Our team is adept at the preparation of all types of mitigation and environmental monitoring reports required by the South Florida Water Management District, Florida Department of Environmental Protection, U.S. Army Corps of Engineers, and any pertinent local agencies requiring this information. In addition, a mitigation monitoring protocol is established and designed as specified in the permits issued for development. We have implemented monitoring programs for a variety of mitigation areas ranging from under 10 acres to 13,000 acres. Components of typical monitoring programs include the establishment and analysis of vegetation monitoring transects, groundwater monitoring wells, mapping of invasive exotic vegetation, and identification and quantification of fish and macroinvertebrate species to assess wetland health and surface water quality within freshwater and estuarine wetland ecosystems.



Utilities

Utilities play a fundamental part in our everyday lives, yet we take for granted the vast systems of water, irrigation and sewer lines that run beneath us, and the engineering it took to provide such consistent service. Our utilities market group is a highly motivated and energetic group of professionals dedicated to the water and wastewater industry. Our expertise has brought water to fire hydrants, homes, drinking fountains, and swimming pools throughout Florida and provided wastewater systems for entire communities. While Collier County Utilities provides services to your community, we stand ready to advise if difficulties arise.



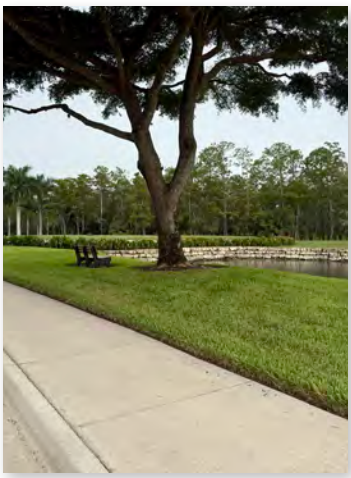
Landscape Architecture

It has been said, "You only get one chance to make a first impression." This adage expresses the primary reasons for developing beautiful landscapes and streetscapes along the main corridors and neighborhood entries within your community. The main portal into this existing residential neighborhood will set the stage for impressions of the community by residents and visitors. The character of this roadway should stand out and reflect that certain level of treatment and attention to detail that represents the lifestyle within the community. At the same time, it must emphasize a gracious welcoming into this neighborhood and the variety of amenities it provides.



Our guide for developing a beautiful landscape renovation design is our focus on complying with the Landscape Committee's goals and "Vision". For this community, the landscape renovation design could include:

- ¬ Utilizing "Florida Friendly" and native landscaping,
- ¬ Incorporating native and drought tolerant plantings,
- ¬ Minimizing landscape maintenance,
- ¬ Implementing sustainability with the elimination of standard irrigation practices,
- ¬ Compliance with sight visibility requirements,
- ¬ Proposed landscape enhancements that provide continuity with existing landscaping surrounding the project area.



Landscape Architecture Services for CDDs often include:

Design Review for Building Guideline Compliance

- ¬ New construction
- ¬ Remodeling / Additions
- ¬ Color & material change recommendations & approvals

Horticultural Maintenance

- ¬ Site walkthrough evaluation & report: Are you paying for too much maintenance? Occasional pruning vs. continual trimming
- ¬ Maintenance guide: Excessive trimming...it all looks the same! Fertilization for healthy plants, pest control recommendations

Arboricultural & Coordination Services

- ¬ Tree trimming overview & recommendations. Trees can create ongoing concerns if left unattended... insurance implications!
- ¬ Coordinate work with Certified Arborists

Design Upgrades to Maintain Property Values:

- ¬ Community "Branding" and Master Planning
- ¬ Refurbish declining plantings
- ¬ Site enhancements with sustainability techniques and Low Impact Development (LID) design
- ¬ Landscape modifications, revised plant palette suggestions for better curb appeal, less maintenance, reduced water consumption - sustainability/Florida Friendly/native
- ¬ Hardscape refurbishment: fences and buffers, pavements, signs, water features, pools and spas, recreation elements, image & identity, outdoor furniture, etc.
- ¬ Landscape lighting design/area lighting design
- ¬ Community "Branding" and Master Planning
- ¬ Site lighting design

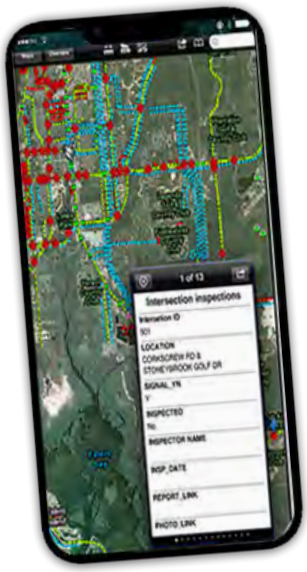
Irrigation

- ¬ Perform a wet check to evaluate proper design & operation
- ¬ Design modifications, upgrades & water use improvements
- ¬ Water source design and connections (well, potable or reclaim)

Permitting & Compliance

- ¬ ADA Compliance Audits
- ¬ Tree removal permits
- ¬ Landscape & Irrigation Certification
- ¬ Local government permitting
- ¬ Landscape Construction Phase Services
- ¬ Plans Preparation
- ¬ Bidding Assistance





Geographic Information Systems (GIS)

Our team uses ESRI's ArcGIS technology to provide an array of interactive digital mapping, data management and spatial analysis and 3D modeling solutions. Tailored web-based applications can be developed for secured, client-only access or for public presentation of maps and support analysis of spatial data. Using GPS, conventional surveying and subsurface utility engineering, our team can provide GIS utility mapping, including asset management, inventories, systems analysis tools and real time system conditions and monitoring. We locate and identify the elements, attributes and condition of these networks and offer a true working model to our clients. We also offer the support, update, and maintenance of our GIS deliverables to ensure that our clients have the most up-to-date and accurate mapping resources available.

Johnson Engineering's GIS team has developed Mobile Mapping applications for iPhone and iPad devices, as well as for some Android and Blackberry mobile devices. These applications allow you to access and view your project specific data layers on your mobile device and see your current position relative to those layers with an aerial background using your device's GPS location information. Mobile maps are also viewable using standard desktop web browsers. Data layers vary from point based features to linear or polygon features. Our team currently employs this technology to assist field operations for environmental/species mapping, well locations and stormwater facilities.

Mobile Mapping Application Benefits - ArcGIS Application - Uses

- ¬ Navigate to field features like wells, structures, monitoring stations, etc.
- ¬ Illustrate for clients, proposed conditions on site.
- ¬ Visualize multiple projects with aerial backgrounds.
- ¬ Locate and visualize existing/proposed underground facilities.
- ¬ Follow onsite drainage patterns and interaction with regional drainage features.
- ¬ Track and navigate to project assets and amenities
- ¬ Depict and navigate to Boundary Survey and Control monumentation.
- ¬ Overlay and visualize a variety of agency polygon coverages with your project limits like Land Use/Land Cover, Wetlands, Soils, Water Body IDs, FEMA Flood Lines, Zoning, Future Land Use, etc.

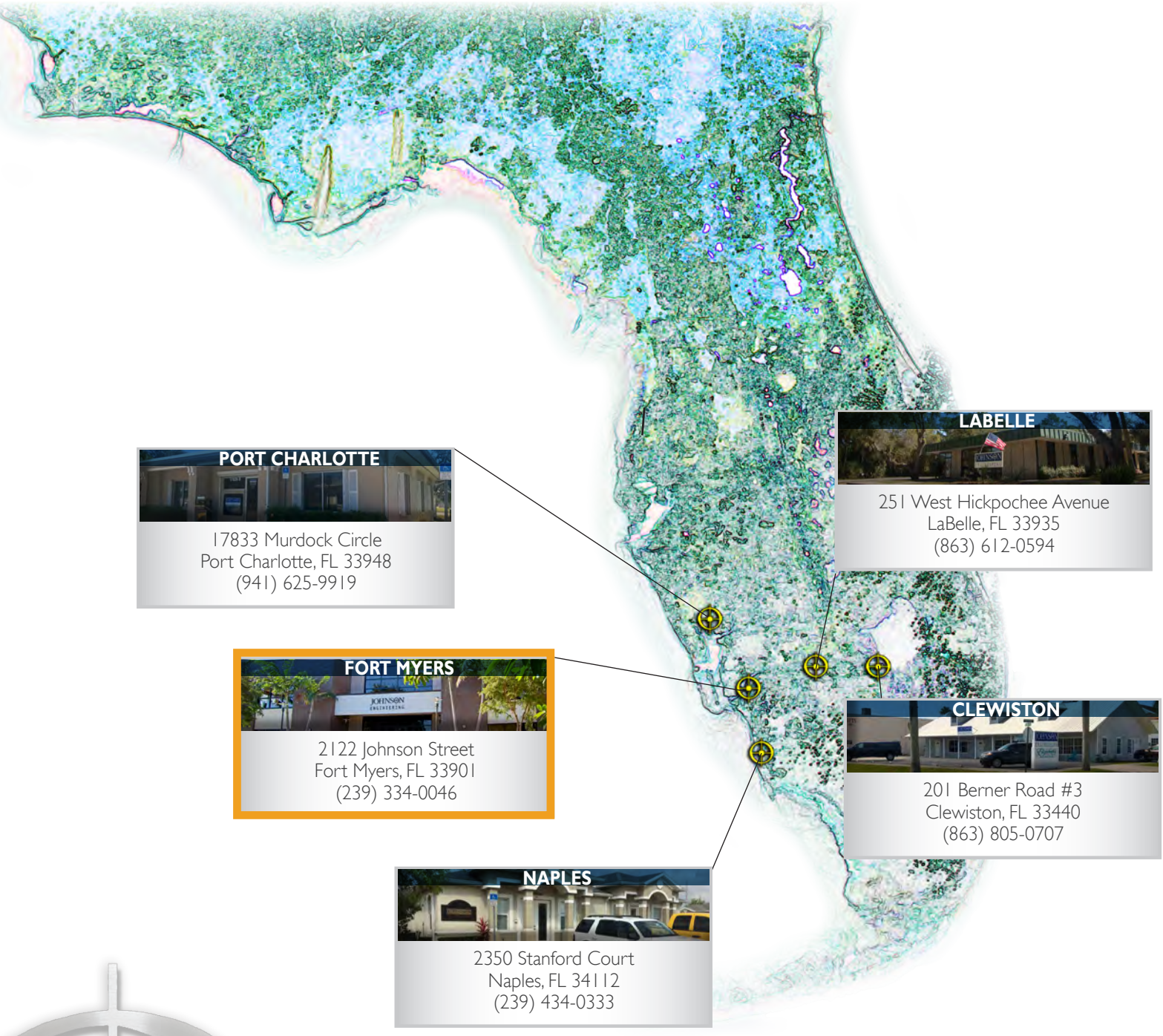
e. Geographic Location



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OFFICE LOCATIONS

We have five offices located throughout Florida. Our Fort Myers office will be the base of operations providing District Engineering Services to the Naples Heritage Community Development District, with support from our other staff.



PORT CHARLOTTE

17833 Murdock Circle
Port Charlotte, FL 33948
(941) 625-9919

LABELLE

251 West Hickpochee Avenue
LaBelle, FL 33935
(863) 612-0594

FORT MYERS

2122 Johnson Street
Fort Myers, FL 33901
(239) 334-0046

CLEWISTON

201 Berner Road #3
Clewiston, FL 33440
(863) 805-0707

NAPLES

2350 Stanford Court
Naples, FL 34112
(239) 434-0333

f. Current & Projected Workloads

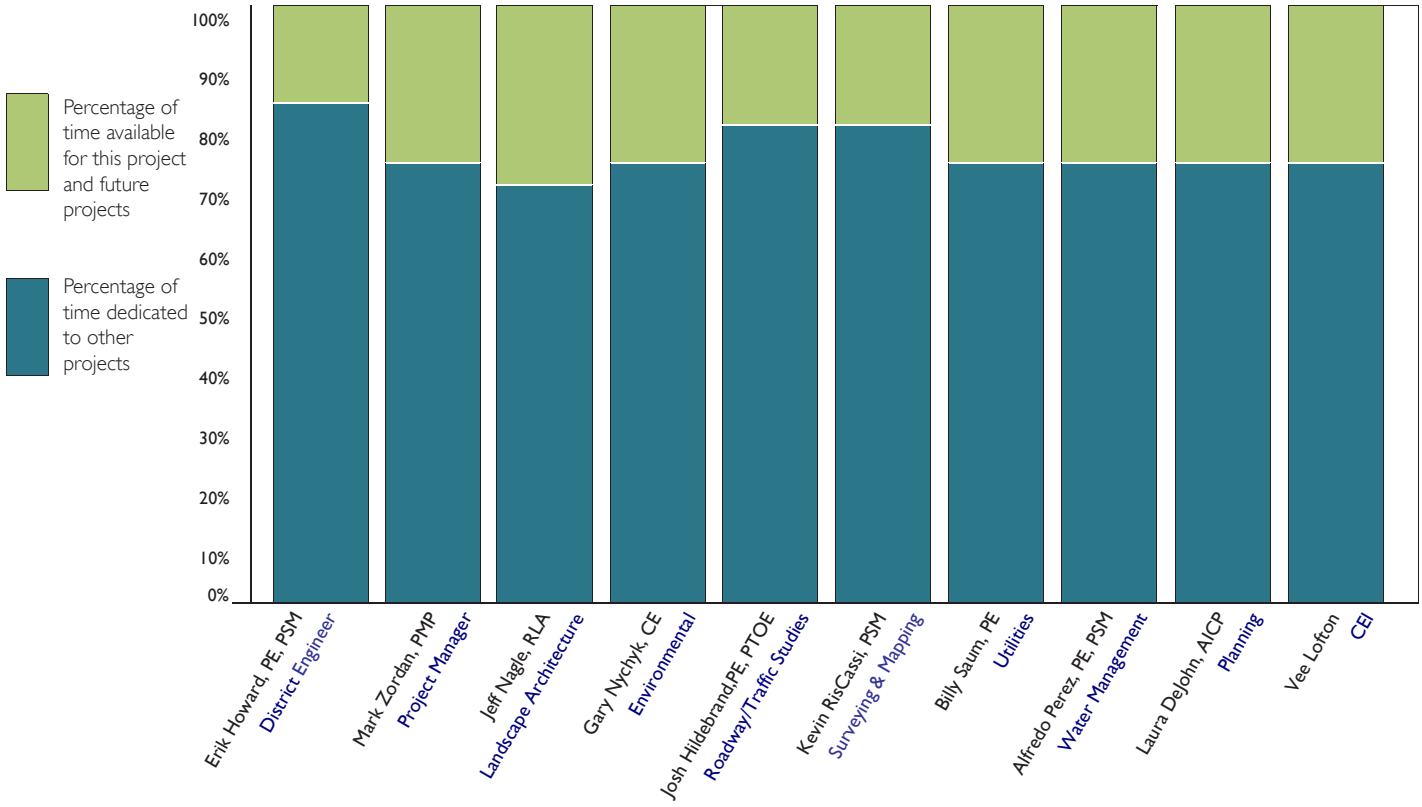


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CURRENT & PROJECTED WORKLOAD

All key team members have sufficient availability and are excited to dedicate their efforts to help the CDD. With a company of over 130 experienced employees, we have the ability to accommodate your schedule.

Current Percentage of Available Time of Key Personnel



g. Volume of Work Previously Awarded to Consultant by District



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g. VOLUME OF WORK PREVIOUSLY AWARDED TO CONSULTANT BY DISTRICT







As previously noted, we have been working with Special Districts for more than 49 years throughout the State of Florida. We have provided services related to drainage, survey, environmental issues, transportation/roadway issues, utility design, landscape design and construction management.

We have successfully interacted with the District Manager and District Counsel in their capacity at other Districts.

If selected, we are ready to assist the Board to achieve its goals and to contribute to the efficient operation and maintenance of the District's infrastructure.

h. SF330



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ARCHITECT-ENGINEER QUALIFICATIONS

PART I – CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

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

Naples Heritage Community Development Disctrict - District Engineer

2. PUBLIC NOTICE DATE

9/15/2025

3. SOLICITATION OF PROJECT NUMBER

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

Erik Howard, PE, PSM, District Engineer

5. NAME OF FIRM

Johnson Engineering, LLC

6. TELEPHONE NUMBER

239-334-0046

7. FAX NUMBER

n/a

8. E-MAIL ADDRESS

ehoward@johnsoneng.com

C. PROPOSED TEAM

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

	(Check) PRIME	(Check) J-V PARTNER	(Check) SUBCON-TRACTOR	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
a.	X			Johnson Engineering, LLC ☐ CHECK IF BRANCH OFFICE	2122 Johnson Street Fort Myers, Florida 33901	Project Management, Water Management, Utilities, Surveying, GIS, Environmental, Roadways, Construction Inspection, Planning, Landscape Architecture, Traffic
b.				☐ CHECK IF BRANCH OFFICE		
c.				☐ **CHECK IF BRANCH OFFICE**		
d.				☐ CHECK IF BRANCH OFFICE		
e.				☐ CHECK IF BRANCH OFFICE		
f.				☐ CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

☒ *(Included within proposal)*

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Erik Howard, PE, PSM	District Engineer	23	22

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

Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
B.S. - Civil Engineering M.E. – Engineering (Hydrological Sciences)	Florida - P.E. Florida - P.S.M. Leadership in Energy & Environmental Design Accredited Professional (LEED AP)

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

State of Florida - Water Well Contractor, Certified General Contract, Certified Plumbing Contractor

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
CFM Magnolia Landing CDD North Fort Myers, FL	Ongoing	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

District Engineer overseeing lake infrastructure inspections and repairs, drainage issues, and provides general engineering support to the Board of Supervisors as needed.

b.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Stoneybrook CDD Estero, FL	Ongoing	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

District Engineer overseeing various drainage projects within the community, in addition to projects that include survey, design, permitting, construction, and inspection of stormwater improvements.

c.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Loveland Master Pump Station Charlotte County, FL	2021	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Project engineer for 12 MGD headworks pump station. The project included six pumps and two 30 feet deep wetwells to serve the Eastport Water Reclamation Facility.

d.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Babcock Ranch Phase II WRF Expansion Charlotte County, FL	2021	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Provided stormwater and drainage design for an expansion to 0.75 MGD. Also, responsible for SFWMD ERP, Charlotte County Site, and Babcock Ranch ISD permitting.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Mark Zordan, PMP	Project Manager	a. TOTAL 43	b. WITH CURRENT FIRM 2

15. FIRM NAME AND LOCATION *(City and State)*
Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
University of Connecticut, Roadmaster Certification (1996)	Project Management Professional (PMP) - 2023

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State)
CFM Magnolia Landing CDD
North Fort Myers, FL

(2) YEAR COMPLETED
PROFESSIONAL SERVICES: Ongoing
CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Mark manages lake infrastructure inspections and repairs, makes recommendations to correct drainage issues, and provides general engineering support to the Board of Supervisors as needed.

b.

(1) TITLE AND LOCATION (City and State)
Stoneybrook CDD
Estero, FL

(2) YEAR COMPLETED
PROFESSIONAL SERVICES: Ongoing
CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Mark is project manager on various drainage projects within the community. These projects include the survey, design, permitting, construction, and inspection of stormwater improvements. He also provides general engineering support to the Board of Supervisors as needed.

c.

(1) TITLE AND LOCATION (City and State)
Collier County Gordon River Basin
Collier County, FL

(2) YEAR COMPLETED
PROFESSIONAL SERVICES: Ongoing
CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☐ Check if project performed with current firm

Mark served as a project manager on a series of six capital stormwater improvement projects needed to address existing stormwater deficiencies. These projects include the replacement of an existing AMIL gate weir and a rock weir, installation of several box culverts, modification or replacement of structures, rip rap, gabion baskets, ditch realignment, and slope protection.

d.

(1) TITLE AND LOCATION (City and State)
Golden Gate City Stormwater Outfalls Replacement
Collier County, FL

(2) YEAR COMPLETED
PROFESSIONAL SERVICES: Ongoing
CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☐ Check if project performed with current firm

Mark co-managed the study for the replacement of approximately one-hundred forty (140) stormwater outfalls. It was determined to phase this large-scale project whereby the worst fifteen outfalls were bundled in a package for survey, design, and construction.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Alfredo Perez, PE, PSM	Water Management	a. TOTAL 28	b. WITH CURRENT FIRM 20

15. FIRM NAME AND LOCATION *(City and State)*
Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
Bachelor of Science Civil Engineering	Florida - PE & PSM

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
0SHA 10: Construction Outreach Training Course

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State)
Green Meadows Water Treatment Plant Wellfield Expansion - Lee County Utilities
Lee County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2012 - 2015	2015-2018

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Responsible for preparing the design plans pre-construction and overseeing daily construction activities on the proposed potable wells, raw water lines and roadway. Assisted in review of shop drawings, field directive changes, water quality sampling, specific capacity testing, step drawdown testing, aquifer performance testing, pressure testing, density testing, roadway grading, construction reporting, project certification review and record drawing preparation.

b.

(1) TITLE AND LOCATION (City and State)
Peace River Dredging - Peace River Manasota Regional Water Supply Authority
Desoto County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2014 - 2016	2016-2017

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Responsibilities included: assisting with the hydrographic survey, survey review, plan exhibit preparation, modeling (HECRAS) existing conditions for the proposed pump intake, shop drawing review during river dredging, and post dredge comparison of the project.

c.

(1) TITLE AND LOCATION (City and State)
Production Well No. 3 - Seminole Tribe of Florida
Collier County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2013	2014

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Construction engineering and inspection on the Immokalee Reservation's newest potable water supply well. Responsibilities, included: plan production, shop drawing review, pipeline pressure testing, drawdown testing, and serving as the company's engineering representative during construction.

d.

(1) TITLE AND LOCATION (City and State)
Ben Hill - Alico Road Wastewater Force Main
Lee County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2013	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Performed a pipeline alignment analysis on a future force main along a major corridor in Lee County. Report recommended best option based on location, existing utilities, construction methods, cost, and overall feasibility of constructing a pipeline.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Jeff Nagle, RLA	Landscape Architecture	41	13

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

Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
B.S./Landscape Architecture Rutgers University, Cook College, 1986	Florida/Landscape Architecture New Jersey/Landscape Architecture

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

Florida Registered Landscape Architect, New Jersey Licensed Landscape Architect, New Jersey Licensed Professional Planner, American Society of Landscape Architects member

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State)
South Biscayne Drive Median Landscape Renovations
City of North Port, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2014	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE

☒ Check if project performed with current firm

This landscaping project of 1.5 miles of roadway median renovation is located within the ROW of South Biscayne Drive within in the City of North Port. The outdated landscape medians consisted of mainly of Cabbage Palms that were well beyond their peak of maturity. This renovation was the City's response to the surrounding residential community's desire to improve the neighborhoods main roadway character. The final design will include drought tolerant FL friendly plantings to reflect the character of the community and ensure durability, sustainability, and reduced maintenance requirements. Sustainable practices will include hydrant supplemented low volume irrigation, soil amendments with compost and water absorbing polymers to insure plant health and the removal of all turf areas to reduce maintenance effort and costs.

b.

(1) TITLE AND LOCATION (City and State)
West County Sheriff Station District 1
Charlotte County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2018	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE

☒ Check if project performed with current firm

Johnson Engineering's landscape architectural team prepared landscape and irrigation design and construction plans for County permitting, bidding and construction of the new West County Sheriff Station site containing approximately 5.5 acres, located at the intersection of Sunnybrook Boulevard and Wilmington Boulevard in Englewood, Charlotte County. The landscaping design was unique on this project requiring compliance with not only Charlotte County's Land Development Code requirements but also with Homeland Security design requirements and implementing design principles of Crime Prevention Through Environmental Design (CPTED) for the placement of proposed landscaping materials due to the nature of the site use and heightened security requirements. Our team provided landscape architectural services for design, bidding assistance, and construction oversight on this project.

c.

(1) TITLE AND LOCATION (City and State)
Rotonda West Entry Signs
Charlotte County, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2014	2014

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE

☒ Check if project performed with current firm

Jeff was responsible for updating the their existing and deteriorating identity signs at five locations. The scope of this project included the development of a new sign that would embody the character of the community while being sensitive to the budget. Through a series of public meetings and concept development a new sign emerged to reflect this established community and its history.

d.

(1) TITLE AND LOCATION (City and State)
Harbor Trail & Wayfinding Parmely Street
Charlotte County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Ongoing	Ongoing

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE

☐ Check if project performed with current firm

This project will both visually and physically enhance the existing corridor connection from the heavily traveled US 41 to the existing and historically significant Bayshore Live Oak Park. Landscape architectural design enhancements include a gateway entry sign at the US Highway 41 entry, way-finding signage for Bayshore Live Oak Park, accessible sidewalk , aesthetically enhanced street intersections, decorative roadway lighting including banners, enhanced and decorative regulatory signage, and visually pleasing Florida Friendly landscaping and low volume irrigation. The landscape architectural improvements were designed to improve both the pedestrian and vehicular experience within this roadway corridor and establish character branding within Charlotte Harbor.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Gary Nychyk	Environmental	a. TOTAL 23	b. WITH CURRENT FIRM 22

15. FIRM NAME AND LOCATION *(City and State)*
Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
B.S. - Marine Biology (1998)	

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
Authorized Gopher Tortoise Agent; Florida Fish and Wildlife Conservation Commission

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Southwest Florida International Airport - Midfield Terminal Expansion - Project Millennium/Fort Myers, Florida	Ongoing	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Johnson Engineering's Environmental Department was responsible for providing environmental services required at the project site for SFWMD and USACOE permitting and the 7,000 acre offsite mitigation area. The extensive habitat mapping, species surveys, water level data and habitat evaluations formed the input for the overall Mitigation Park management plan and design. The design included over 500 acres of wetland creation and construction cost totaled $7.4 million. Johnson Engineering also provided construction oversight for the Mitigation Park which in 2004 won a national award from the Airports Council International - North America for environmental excellence. Johnson Engineering currently serves as SWFIA's Environmental and Planning Consultant.

b.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
State Road 739 (Metro Parkway) Extension/Fort Myers, Florida	Ongoing	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Johnson Engineering conducted all the environmental permitting required for the extension of State Road 739 (Metro Parkway) from Six Mile Cypress Parkway to Alico Road. This project involved habitat mapping, protected species surveys, managing for Big Cypress fox squirrel and gopher tortoise involvement, state and federal wetland permitting, mitigation design and implementation. As compensation for wetland impacts associated with the roadway crossing of Six mile Cypress Slough, the wetland mitigation program includes over 284 acres of wetland restoration in Lee County's Six Mile Cypress Slough Preserve.

c.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Boca Grande Causeway North Swing Bridge Replacement / Placida, Florida	2013	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

The Johnson Engineering environmental team conducted all of the environmental permitting required for the replacement of the Boca Grande Causeway North Swing Bridge. Tasks included SWFWMD and USACOE Environmental Resource and Federal Dredge and Fill Permitting, obtaining USACOE Section 408 Clearance for project involvement within the federal navigation channel, USCG Bridge Permitting, NMFS consultation for smalltooth sawfish (critical habitat), sea turtles and manatee, sea grass surveys, benthic surveys and protected species surveys, and preparation of Biological Assessment Report.

d.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Pine Island Wastewater Treatment Plant/Pine Island, Florida	2005	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

The Johnson Engineering Environmental team performed all permitting required for the construction of the Pine Island Wastewater Treatment Plant. This project involved working within three different bald eagle nests's primary and secondary zones, relocating gopher tortoises and beautiful pawpaw (an endangered plant), managing for Eastern indigo snakes, wetland impact permitting, mitigation design and implementation, restoring the Matlacha Wastewater Treatment Plant, and securing a submerged lands lease from FDEP.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Alec Piironen, PG	Water Use	9	4

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

Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
Earth & Environmental Sciences, University of Illinois at Chicago (2015)	PG3184 - ASTM 1527-21 MODFLOW

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State): Ave Maria Hydrogeological Investigations, Collier County, Florida

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2022 — CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Assisted with Sandstone and Lower Tamiami aquifer irrigation well construction, aquifer performance testing and water quality analysis.

b.

(1) TITLE AND LOCATION (City and State): Town and County Utility Hydrogeological Investigation at Babcock Ranch, Florida

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2022 — CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Assisted with Upper Floridan and Sandstone aquifer test well construction, aquifer performance testing and water quality analysis.

c.

(1) TITLE AND LOCATION (City and State): Irrigation and Construction Dewatering Permitting, Southwest Florida

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: Ongoing — CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Assisted with the preparation of irrigation permit applications for various residential community development projects, which included water resource and regulatory review, and permitting assessment.

d.

(1) TITLE AND LOCATION (City and State): Phase I Environmental Site Assessments (ESAs), Southwest Florida

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: Ongoing — CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Assisted in the historical document inquiry and review, site reconnaissance, report preparation and review for various commercial, industrial, and rural clients.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
Kevin RisCassi, PSM	Survey	33	24

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

Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
B.A. Economics, Trinity College Hartford CT	Florida PSM 2003

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

Florida Surveying & Mapping Society

19. RELEVANT PROJECTS

	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
	GIBA Toll Bridge Gasparilla Island, FL	2010-Current	
a.	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm		
	Kevin was responsible for control and mapping hydrographic data necessary in dredging and design analysis for the construction of new bridges.		
	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
	Ding Darling Sanibel, FL	2009	
b.	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm		
	Kevin was responsible for vertical control, obtaining cross sections on drainage creeks and topographic data collection on approximately 230 acres mangrove vegetated land for run off and restoration studies .		
	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
	Clam Pass Collier County, FL	2006-07	
c.	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm		
	Kevin was responsible for control survey, beach cross sections, profile data and hydrographic mapping on four cuts flowing to the pass.		
	(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
	U.S. Navy Turning Basin at Key West Bight Key West, FL	2006	
d.	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm		
	Kevin played an instrumental role in the hydrographic survey of an existing basin for design.		

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Billy Saum, PE	Utilities	a. TOTAL 10	b. WITH CURRENT FIRM 10

15. FIRM NAME AND LOCATION *(City and State)*
Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State And Discipline)*
B.S. - Environmental Engineering	Florida - PE

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State): Misc. Wastewater Data Collection, Analysis, and Evaluation Collier County, Florida

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2015 - Ongoing; CONSTRUCTION *(If applicable)*: N/A

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

This project consists of providing ongoing services for Collier County to determine wastewater system pressures and flow conditions. Billy is responsible for the project management, field data collection, coordination and meetings with Collier County Wastewater Collections and Engineering staff, data analysis, and system evaluation. The data and analysis are used to determine connection pressures to size pumps, determine pump station and force main flow capacity, and evaluate system performance to maximum efficiency and determine if systems are prone to inflow and infiltration (I&I) as a result of rainfall. This project is unique in that it utilizes real world collected data as the basis for determining system improvements to ensure facilities are properly sized to accommodate both existing and future wastewater generation.

b.

(1) TITLE AND LOCATION (City and State): Septic to Sewer Improvements: City of Clewiston, Florida

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2020; CONSTRUCTION *(If applicable)*: Substantially Complete

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

This project consists of improvements to convert the existing septic system servicing a federal government facility to a centralized gravity sewer system. Billy is responsible for the project management, design, permitting, bidding assistance, and construction administration services. Billy is also the engineer of record for the project. The project includes the installation of 1,400 LF of 8" gravity sewer, 10 manholes, a 6-inch force main installed via directional drill underneath an existing canal, a duplex pump station, connections to the existing system, abandonment of the existing septic system, and restoration to all impacted areas. This project also included coordination with City, Contractor, and USACOE staff, and local businesses. The project is currently substantially completed, under budget, and ahead of schedule.

c.

(1) TITLE AND LOCATION (City and State): Hickory Road Water Main Improvements: Collier County, Florida

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2019; CONSTRUCTION *(If applicable)*: 2021

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

This project consisted of replacing an existing 16" water main that was failing with a new 20" water main pipeline within an existing built out residential area in Naples Florida. Billy was the project engineer during the design phase of the project and was also responsible for permitting, bidding assistance, and construction administration and was the engineer of record certifying the project. This project included the installation of 4,700 feet of 20" water main pipeline, various quantities of 8"-24" water main pipelines, an 18" diameter pipeline installed via directional drill underneath US-41, valves, hydrants, connections to existing systems, abandon the existing 16" water main in place, and restoration to all disturbed areas, including residential driveway replacements. This project also included extensive coordination with County and contractor staff, residences in the community, and FDOT staff. The project was completed within the schedule and budget.

d.

(1) TITLE AND LOCATION (City and State): Pump Station 300.06 Improvements: Collier County, Florida

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2020; CONSTRUCTION *(If applicable)*: 2022

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

This project consisted of improvements to the existing duplex pump station located in a residential community to meet the current standards and improvement operations. This project also consisted of acquiring a new easement from the nearby Condominium association to locate an emergency backup generator to power the pump station in the event of a power failure. Billy was the engineer of record for this project and performed project management, permitting, design and equipment selection, bidding assistance, and construction administration and inspection services. This project also included extensive coordination with County staff, and contractors and subcontractors, and residences of the community and condominium association boards.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Joshua Hildebrand, PE, PTOE	QA/QC	a. TOTAL 20	b. WITH CURRENT FIRM 18

15. FIRM NAME AND LOCATION *(City and State)*
Johnson Engineering, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
B.S. Civil Engineering (2007), Purdue University	Florida - PE Florida - PTOE

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
Intermediate MOT, FDEP Qualified Stormwater Inspector, FDOT Level of Service

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State)
Downtown Naples Traffic Study
City of Naples, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2025	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Josh is part of the team that provided a downtown City wide traffic study to assess current and future travel demands. Peak season bi-directional twenty-four-hour traffic data along with turning movement counts were collected to verify data. The data was processed and compiled into a detailed report highlighting the volumes recorded, along with growth projections and levels of service for the respective roads and intersections analyzed. These volumes were used to assess the future demands on the City roadways as well as develop proposed improvements to alleviate delays and improve safety.

b.

(1) TITLE AND LOCATION (City and State)
County Wide Pathway Constructability Study
Collier County, Florida

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2017	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Project Engineer for a study of five priority locations throughout the County to analyze and assess the feasibility of adding future sidewalks or bike lanes along the existing public corridors.

c.

(1) TITLE AND LOCATION (City and State)
Harbour Drive & Crayton Road
City of Naples, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
2019	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

As part of the team, Josh provided design services to create a modern roundabout located at the intersection of Harbour Drive and Crayton Road. This transportation project converted a busy vehicular intersection and implemented a more pedestrian and bicycle friendly design while maintaining traffic flow. The proposed roundabout at Harbour Drive and Crayton Road was based on the City's need to: reduce crashes and injuries, provide pedestrian and bicycle access, calm vehicular speeds, reduce operational costs and increase pervious and landscaped greenspace. Not only does this design increase safety, but it also provides for aesthetically pleasing landscaped medians and a roundabout centerpiece for the neighborhood and City residents. Our project team attended multiple public meetings to ensure that the community's feedback was noted, and comments represented in the design for this project.

d.

(1) TITLE AND LOCATION (City and State)
Village Wide Traffic Study
Village of Estero, FL

(2) YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Ongoing	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE ☒ Check if project performed with current firm

Josh is part of the team contracted to collect bi-directional twenty-four-hour traffic data along with turning movement counts within the Village of Estero, located in Lee County. These locations were counted for a period of seven days, between February and March. The data was processed and compiled into a detailed report highlighting the volumes recorded, along with growth projects and levels of service for the respective roads analyzed. This comprehensive data collection and analysis was vital to the Village to not only to report traffic volumes to Lee County, but also to aid in assessing their roadway and intersection capacities due to their accelerated growth rate in recent years, along with proposed solutions for both the short term and long term.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Marina Guirguis	GIS	a. TOTAL 8	b. WITH CURRENT FIRM 8

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

Johnson Engineering, Fort Myers, Florida

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State And Discipline)*
Master of Design in Sustainable Urban Environments Northeastern University	

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

Member, APA (American Planning Association)

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State): Comprehensive Plan, Village of Estero, FL

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2019 — CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Marina provided graphic services in the Comprehensive Plan's creation through GIS presentation for the Future Land Use map and formatting for the full document. Additionally, Marina drafted overviews for the elements of the Comprehensive Plan, Planning & Zoning Board presentations, and supporting Placemaking policies and imagery.

b.

(1) TITLE AND LOCATION (City and State): Collier County Growth Management Department: Golden Gate City, Collier County, FL

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2019 — CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Marina designed and rendered conceptual masterplan vision of Golden Gate Activity Center to then influence the development standards of the Golden Gate Parkway Overlay. Created code graphics, drafted Regulating Plan, and assisted in public involvement efforts to draft a new Golden Gate Parkway Overlay. Designed corresponding Regulating Plan that lays out a primary and secondary street network featuring a mixed-use Activity Center and walkable pedestrian corridor.

c.

(1) TITLE AND LOCATION (City and State): Lee County Port Authority Airport Planning , Lee County, FL

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2019 — CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Marina provided research and analysis, GIS analysis of existing land conditions, GIS mapping for code purposes, and conceptual design of aviation and non-aviation development. Her involvement ranges in different projects for both Page Field and Southwest Florida International Airport including, but not limited to, Project Bronze, Skyplex illustrative conceptual plan, North Quad concept mapping, Comprehensive Plan Amendments and Land Development Code Amendments.

d.

(1) TITLE AND LOCATION (City and State): Enterprise Charlotte Airport Park (ECAP), Charlotte County, FL

(2) YEAR COMPLETED — PROFESSIONAL SERVICES: 2018 — CONSTRUCTION *(If applicable)*:

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Marina developed different maps for the Enterprise Charlotte Airport Park (ECAP) Ordinances Updates through GIS and applied design aesthetics for presentation.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Laura DeJohn, AICP	Planning	a. TOTAL 27	b. WITH CURRENT FIRM 21

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

Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(Degree and Specialization)*	17. CURRENT PROFESSIONAL REGISTRATION *(State And Discipline)*
Master of Planning - American Urbanism Bachelor of City Planning	AICP (American Institute of Certified Planners)

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

Member, APA (American Planning Association)

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Comprehensive Plan Village of Estero, Florida	2019	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Laura assisted with the data collection, analysis, public involvement, and drafting of the Village's first Comprehensive Plan and continues in providing similar services in preparation of the Village's first Land Development Code. Laura's focus was the Future Land Use Element and Map, Community Design Sub-Element, formatting of the final comprehensive plan, architectural and landscape standards, and presentations to the Planning and Zoning Board and Village Council.

b.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Stoneybrook CDD Lee County, FL	2008	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Laura assisted with the communitywide lake bank restoration project, which included inventory, mapping and coordination with Lee County Development Review staff to justify deviations to allow alternative designs for lank bank restoration to be more cost effective and to minimize impact to property owners.

c.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Pine Air Lakes CDD Collier County, Florida	2007	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Laura assisted with establishing a permit tracking system for the CDD to identify and maintain compliance with monitoring, reporting, and other stipulations for the various entitlements and permits issued within the CDD.

d.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Miromar Square Corporate Center Lee County, Florida	2006	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Laura prepared commercial planned development and notice of proposed change applications for an 18-acre office and hotel site, coordinated master concept plan, Estero Community Planning Panel presentation, and processed applications with County staff, hearing examiner and Board of County Commissioners.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
James "Vee" Lofton	Construction Engineering & Inspection	a. TOTAL 37	b. WITH CURRENT FIRM 18

15. FIRM NAME AND LOCATION *(City and State)*
Johnson Engineering, LLC, Fort Myers, Florida

16. EDUCATION *(DEGREE AND SPECIALIZATION)*	17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*
Edison Community College	

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*
FDOT Advanced Work Zone Traffic Control, Troxler Nuclear Gauge Safety Certification, ACI Concrete Field Testing Technician – Grade I-II (ID #00928086), FDOT Asphalt Paving Technician I & II, FDOT Earthwork Construction Inspection – Level I-II, FDOT Concrete Field Technician – Level I, FDOT Concrete Spec Section 346 / 400, FDOT Drilled Shaft Installation Inspection, FDOT Pile Driving Installation Inspection

19. RELEVANT PROJECTS

a.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Pelican Marsh CDD Lee County, Florida	Ongoing	Ongoing

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☒ Check if project performed with current firm

Last fall, the community began a multi-year roadway paving of the main roads. Vee, along with our transportation group, provided a pavement condition report and construction engineering and inspection services during the completed paving project to monitor the contractors performance and verify invoicing quantities.

b.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
FDOT Consultant Program Manager, Broadband Class Code: Level (3), Fort Myers, Florida		2006-2008

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☐ Check if project performed with current firm

Vee assists the Fort Myers Operations Center Engineering Manager by overseeing Consultant Construction Engineering and Inspection (CCEI) administration of construction contracts and by administrating CCEI contracts. He also monitored, reviewed and evaluated CCEI firms contracted by the Department to administer construction projects to ensure work was performed in accordance with contract requirements, Department policy and procedure, and/or Construction Project Administration Manual, (CPAM). Vee was also responsible for reviewing and making recommendations for approval of changes on project/contract records, supplemental agreements; including time and money issues, monetary claim packages, requests for time extensions, and other contract related documents prepared by the consultant to ensure completeness and conformity to Department procedures and policies. He also served FDOT as CCEI Consultant Program Manger.

c.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Helms Roadway Extension Hendry County, Florida	Ongoing	

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☐ Check if project performed with current firm

Vee is responsible for the construction engineering & inspection for approximately three miles of new four-lane urban roadway improvements. His roles include soil density testing and sampling, concrete testing, review of pay requests, shop drawings and RFI's. This project includes the construction of four box culverts and one box culvert extension.

d.

(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Peace River Bridge Punta Gorda, Florida		2001-2003

(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE — ☐ Check if project performed with current firm

The I-75 Peace River Bridge Design- Build Project consisted of the construction of a new bridge structure between the existing bridges, replacement of the existing concrete bridge deck and removal of the Northbound I-75 bridge to its entirety, to widen the existing roadway to a six-lane facility. The project included widening of the existing bridge structure over Riverside Drive and Gulf Seminole Railway. Vee served as Project Administrator for FDOT and FHWA as this project was a pilot design build project with FHWA oversight.

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

1

21. TITLE AND LOCATION (City and State)	22. YEARS COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Riverwood Community Development District Broward County, Florida	Ongoing	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Riverwood CDD, Inframark	Mr. Robert Koncar	(904) 626-0593

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

Johnson Engineering is one of two firms providing engineering services for this district. Our focus is on water management, environmental, road, and landscape needs with the other firm focused on the utility plants operated by the District. The District has several water management permits, which we are assisting with budgeting to meet permit requirements.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Johnson Engineering	Fort Myers, Florida	District Engneer
b.			
c.			
d.			
e.			

F. EXAMPLE PROJECTS WITH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATION FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified.

20. EXAMPLE PROJECT KEY NUMBER: 2

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

Verandah West Community Development District - District Engineer
Lee County, Florida

22. YEARS COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Ongoing	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Verandah West Community Development District	Mr. Chuck Adams	(239) 498-9020

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

Johnson Engineering prepared the original Engineer's Report and amendments, along with the other items in the Verandah West Community, located in Lee County, Florida.

During construction, portions of the community assets were reviewed by our team prior to acquisition by the CDD. This included review of construction documents, on-site testing and certifications to the regulatory agencies. We also assisted with delineation of conservation areas and private lands within the District for the division of maintenance responsibilities.



19. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (*City and State*)	(3) ROLE
a.	Johnson Engineering	Fort Myers, Florida	Water Management, Utilities and Environmental Permitting
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

3

21. TITLE AND LOCATION (City and State)

Cory Lake Community Development District
Tampa, Florida

22. YEARS COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Ongoing	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Wrathell, Hunt & Associates, LLC.	Mr. Chuck Adams	(239) 498-9020

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

Johnson Engineering is the District Engineer for the Cory Lakes Community Development District. This District has an extensive stormwater system consisting of several interconnected lakes and wetlands. Our work has included assisting the District to replace large concrete stormwater structures that were in desperate need of repair as well as assisting with general maintenance issues related to failing inlets, pipes and drainage ditches. Other services have included ADA surveys, new concrete sidewalks and assistance with concrete bridge repairs.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Johnson Engineering	Lutz, Florida	Water Management, ADA Surveys, Sidewalks
b.			
c.			
d.			
e.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

4

21. TITLE AND LOCATION (City and State)	22. YEARS COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
The Brooks of Bonita Springs Community Development District Lee County, Florida	Ongoing	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Wrathell, Hunt & Associates	Mr. Chuck Adams	(239) 498-9020

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

Johnson Engineering is the District Engineer for The Brooks CDD in South Lee County, Florida. Our team provides professional engineering services, including establishment, reports for bonds, assisting during the construction and development process, as well as during the operation and maintenance of the CDD.

During the construction and the development process, Johnson Engineering prepared Engineer's Reports and amendments, when needed, and reviewed and approved requisitions from bond proceeds. We participate in the operation and maintenance with the CDD through work of facilities modifications, GATSB 34, as well as modifications to the water management system. Our team also provides site planning, zoning and permit applications.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Johnson Engineering	Fort Myers, Florida	Water Management, Development and Planning
b.			
c.			
d.			
e.			

F. EXAMPLE PROJECTS WITH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATION FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER: **5**

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

Pelican Marsh Community Development District - District Engineer
Lee County, Florida

22. YEARS COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION (*If applicable*)
Ongoing	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Pelican Marsh CDD	Mr. Neil Dorrill	(239) 592-9115

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

Johnson Engineering has provided general engineering services for the Pelican Marsh CDD in North Collier County, Florida since 2002. The services we have provided the District include reviewing the stormwater system when flooding has occurred throughout the community, reviewing offsite impacts of existing and proposed facilities affecting the stormwater system and assisting with improving the access control facilities, and reviewing roadway signage and sight distance issues.



Our engineering services have included preparing amended Engineer's Reports, review and approve requisitions, and an asset summary. We also provided site planning, zoning, and permit applications for perimeter fencing and an on-site maintenance facility which was completed in May 2010. An analysis of the affect of off-site developments that convey stormwater runoff through the community was made to minimize adverse impacts to the community. The analysis included monitoring of extreme rainfall events and observations of the piped conveyance system. We have also worked with the district attorney to establish values for infrastructure owned by the CDD that were going to be impacted by road widening projects and required adjustments.



Last fall, the community began a multi-year roadway paving of the main roads. Our transportation group provided a pavement condition report and construction engineering and inspection services during the completed paving project to monitor the contractors performance and verify invoicing quantities.

19. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (*City and State*)	(3) ROLE
a.	Johnson Engineering	Fort Myers, Florida	Water Management, Wetlands and Roads
b.			
c.			
d.			
e.			
f.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

6

21. TITLE AND LOCATION (City and State)

District Engineer - Pine Air Lakes Community Development District
Collier County, Florida

22. YEARS COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Ongoing	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Pine Air Lakes Community Development District	Mr. Rich Hans	(954) 721-8681

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

Johnson Engineering provides professional engineering services for Pine Air Lakes Community Development District located in Collier County, Florida. The work includes establishment, reports for bonds, assisting during the construction and development process, as well as during the operation and maintenance of the CDD.

During the construction and the development process, our team prepared the Engineer's Reports and amendments, when needed, and reviewed and approved requisitions from bond proceeds. We participate in the operation and maintenance with the CDD through work of facilities modifications, as well as modifications to the water management system. Our team also provides site planning, zoning and permit applications.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Johnson Engineering	Fort Myers, Florida	Water Management, Development, Planning, Roads
b.			
c.			
d.			
e.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

7

21. TITLE AND LOCATION (City and State)	22. YEARS COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Longleaf Community Development District Pasco County, Florida	Ongoing	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Inframark	Mrs. Heather Dilley	(813) 873-7300

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

Johnson Engineering has provided professional engineering services for the Longleaf Community Development District in Pasco County, Florida since 2009.

The work includes establishment, reports for bonds, processing National Pollutant Discharge Elimination System (NPDES) permit compliance, assisting during the construction and development process, as well as during the operation and maintenance of the CDD.

Our team recently provided design oversight, bidding, contract administration, and construction observation services for infrastructure repairs to a number of CDD maintained raods and drainage facilities.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Johnson Engineering	Lutz, Florida	Water Management, Roads, ADA Compliance for Recreation
b.			
c.			
d.			
e.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

8

21. TITLE AND LOCATION (City and State)

Mediterra Community Development District
Collier County, Florida

22. YEARS COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Ongoing	N/A

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Wrathell, Hunt & Associates	Mr. Chuck Adams	(239) 498-9020

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

Johnson Engineering has been the District Engineer at Mediterra since 2002. Work has included pay request review for release of bond funds, stormwater pond evaluations, fire safety related to naturally vegetated areas, and littoral vegetation maintenance.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Johnson Engineering	Fort Myers, Florida	Water Management, Roads, Landscape Architecture, Wetlands
b.			
c.			
d.			
e.			

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

9

21. TITLE AND LOCATION (City and State)	22. YEARS COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Park Place Community Development District Tampa, Florida	Ongoing	

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Inframark	Mrs. Angie Grunwald	(813) 873-7300 ext 116

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

As District Engineer for the Park Place CDD, Johnson Engineering has provided general engineering services related to traffic calming, roadway repairs and improvements (asphalt and brick pavers), ADA compliance, vendor/contractor selection and oversight, parking assessments and inspection of stormwater detention ponds as well as a other professional services on an as-needed basis. By closely coordinating with the District Manager and communicating effectively with the Board, we have been able to assist the District in maintaining its infrastructure at an acceptable level.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Johnson Engineering	Lutz, Florida	Civil Engineering, Traffic, Roadway, Stormwater
b.			
c.			
d.			
e.			

10F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

10

21. TITLE AND LOCATION (City and State)

CFM Community Development District
Lee County, Florida

22. YEARS COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION *(If applicable)*
Ongoing	Ongoing

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
Rizzetta & Company	Ms. Belinda Blandon	(239) 936-0913

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

Johnson Engineering has provided general engineering services for the CFM CDD in Lee County, Florida since 2007. The services we have provided the District include reviewing the stormwater system throughout the community for compliance to permits, reviewing offsite impacts of existing and proposed facilities affecting the stormwater system, conservation area encroachment issues, and reviewing roadway signage and sight distance issues.

Our engineering services have included preparing amended Engineer's Reports, review and approve requisitions, and an asset summary. As part of the District Staff Johnson Engineering provided technical support through the developer transfer process and, later, the expansion of District boundary.



25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION *(City and State)*	(3) ROLE
a.	Johnson Engineering	Fort Myers, Florida	Water Management, Development, Planning, Environmental
b.			
c.			
d.			
e.			

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

26. NAMES OF KEY PERSONNEL (From Section E, Block 12)	27. ROLE IN THIS CONTRACT (From Section E, Block 13)	28. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Project Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)									
		1	2	3	4	5	6	7	8	9	10
Erik Howard, PE, PSM	District Engineer		X			X			X		X
Alfredo Perez, PE, PSM	Water Management	X	X		X	X		X			X
Billy Saum, PE	Utilities							X			
Jeff Nagle, RLA	Landscape Architecture							X	X		
Kevin RisCassi, PSM	Survey & Mapping		X				X	X			
Marina Guirguis	GIS		X		X	X	X	X			
Gary Nychyk	Environmental						X	X	X		
Josh Hildebrand, PE, PTOE	Roadways/Traffic Studies			X		X	X	X		X	
Laura DeJohn, AICP	Planning		X				X				X
Vee Lofton	CEI					X		X			
Alec Piironen, PG	Water Use	X	X								X
Mark Zordan, PMP	Project Manager		X		X				X		X

29. EXAMPLE PROJECTS KEY

NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)	NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)
1	Riverwood Community Development District	6	Pine Air Lakes Community Development District
2	Verandah West Community Development District	7	Longleaf Community Development District
3	Cory Lake Community Development District	8	Mediterra Community Development District
4	The Brooks of Bonita Springs Community Development District	9	Park Place Community Development District
5	Pelican Marsh Community Development District	10	CFM Community Development District

H. ADDITIONAL INFORMATION

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

When Johnson Engineering was established in 1946, much of Florida was an undisturbed land. Now 79 years later we have seen a boom in development and a tremendous population growth alter the landscape permanently. Johnson Engineering has been helping guide private companies, city, county, state, and federal governmental institutions through these changes and the challenges they create.

Just as Florida has transformed dramatically over the years, so has Johnson Engineering. What started as one man surveying Florida's west coast has developed into a team of 130 professionals throughout Florida, offering their expertise in a broad spectrum of engineering disciplines. Our team provides civil engineering design for land development, planning and landscape architecture, utilities, transportation design, and construction engineering and inspection. Our surveying and mapping group specializes in utility mapping, transportation surveying, hydrographic surveying, and geographic information systems and our water resource management group provides environmental consulting, surface water management, water quality studies, and water supply services.

Our extensive list of well-known Florida airport facilities, roads, shopping centers, schools, hospitals, residential communities, resorts and commercial developments show our continued responsibility in developing Florida's communities.

The company has offices in Fort Myers, Port Charlotte, LaBelle, Clewiston, and Naples.

While Johnson Engineering is focused on growing and evolving to continue serving the needs of Florida, it remains true to its past and the values upon which the company was founded.

Depth of Experience
Centuries of combined experience has immersed our team of licensed professionals into Florida's geography, giving a rare perspective into development of the area and an appreciation of the changes.

Full Range of Services
Specialized teams of engineers, planners, landscape architects, surveyors, ecologists, water resources experts, transportation and utility designers provide many aspects needed to complete your projects.

Long Term Commitment
Our team's average tenure with Johnson Engineering is 13 years, 53% of our employees have been here for more than 10 years, and an unprecedented 21% have been with us for more than 20 years, showing our team's continuity and dedication to the area.

Local Presence
We can provide invaluable historical data of the local area and our conveniently located offices allow us to provide prompt service and communication through every step of your project.

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE



32. DATE

10/17/2025

33. NAME AND TITLE

Erik Howard, PE, PSM, District Engineer

ARCHITECT-ENGINEER QUALIFICATIONS

1. SOLICITATION Number (if any):

PART II – GENERAL QUALIFICATIONS

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

2a. FIRM (OR BRANCH OFFICE) NAME: Johnson Engineering, LLC		3. YEAR ESTABLISHED: 1946	4. DUNS NUMBER: 048177498
2b. STREET: 2122 Johnson Street		5. OWNERSHIP a. TYPE: Partnership	
2c. CITY: Fort Myers	2d. STATE: FL / 2e. ZIP CODE: 33901	B. SMALL BUSINESS STATUS: Non-Minority	
6a. POINT OF CONTACT NAME AND TITLE: Erik Howard, PE, PSM, District Engineer		7. NAME OF FIRM *(If block 2a is a branch* office)	
6b. TELEPHONE NUMBER: (239) 334-0046	6c. E-MAIL ADDRESS: ehoward@johnsoneng.com		
8a. FORMER FIRM NAME(S) *(if any)*: N/A		8b. YR. ESTABLISHED	8c. DUNS NUMBER

9. EMPLOYEES BY DISCIPLINE

a. Function Code	b. Discipline	c. No. of Employees (1) FIRM	c. No. of Employees (2) BRANCH
02	Administrative	22	15
07	Biologist	0	0
08	CADD Technician	30	24
12	Civil Engineer	14	7
15	Construction Inspector	9	10
16	Construction Manager	1	1
19	Ecologist	9	5
21	Electrical Engineer	1	1
23	Environmental Engineer	1	1
24	Environmental Scientist	3	3
29	GIS Specialist	1	1
30	Geologist	3	3
33	Hydrographic Surveyor	2	2
38	Land Surveyor	18	14
39	Landscape Architect	2	2
47	Planner: Urban/Regional	3	2
48	Project Manager	1	1
58	Technician/Analyst	1	1
60	Transportation Engineer	3	1
62	Water Resources Engineer	4	1
	Total	130	95

10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS

a. Profile Code	b. Experience	c. Revenue Index Number *(see below)*
C15	Construction Management	6
D01	Dams (Concrete; Arch)	1
E09	Environmental Impact Studies	6
E10	Environ. & Natural Resource	2
G04	Geographic Information System	4
H07	Highways; Streets; Parking Lots	6
H09	Hospital & Medical Facilities	3
I06	Irrigation; Drainage	6
L02	Land Surveying	7
L03	Landscape Architecture	2
P05	Planning (Community; Regional)	6
R04	Recreation Facilities	3
R11	Rivers; Canals; Waterway; Flood	2
S10	Surveying; Platting; Mapping	7
S13	Storm Water Handling & Fac.	2
W02	Water Res.; Hydro; Ground Wat.	2
Z01	Zoning; Land Use Studies	3

11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS

(Insert revenue index number show at right)

a. Federal Work	N/A
b. Non-Federal Work	8
c. Total Work	8

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

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

12. AUTHORIZED REPRESENTATIVE

The forgoing is a statement of facts.

a. SIGNATURE: Erik Lee Howard

b. DATE: 10/17/2025

C. NAME AND TITLE: Erik Howard, PE, PSM, District Engineer

Fifth Order of Business

5D

AMERICAN CONCRETE OF SW FL INC

180 Trinidad ST Naples FL 34113

239-572-2921

INVOICE

Date: 10/1/2025

ATTN: Chris Gant

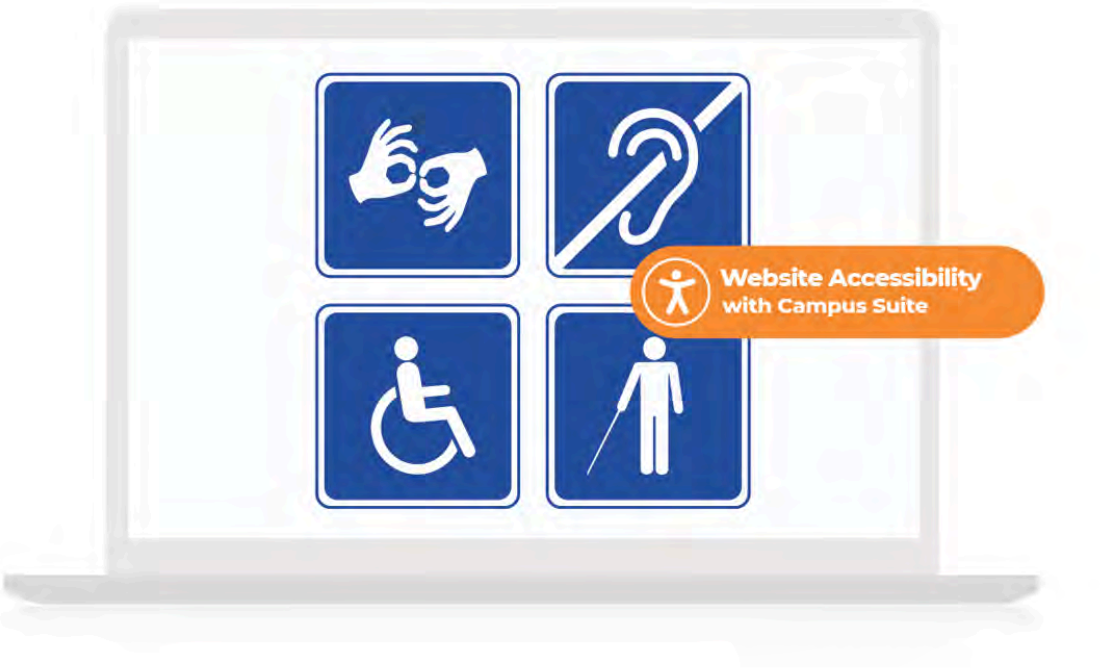
RE: Naples Heritage Golf and Country Club
Sidewalks

Terms: Paid on completion

Description	Quantity	Unit Price	Cost
Arbor Lakes - remove and replace a 4’ x 5’ sidewalk section			
7826- Remove and replace 2 - 4’ x 5’ sidewalk sections			
Remove roots			
8242 - Remove and replace a 4’ x 5’ sidewalk section			
Remove roots			
Heritage Links Dr- Remove and replace 4 - 4’ x 5’ sidewalk sections			
8790- remove and replace 4’ x 10 sidewalk section			
			$6,620.00
Extra: 4’ x 5’ section of sidewalk Remove roots			$700.00
		Total	$7,320.00

Payment must be received within 30 days of invoice or a notice to owner will be filed for an additional fee of $200.00

5E.



Quarterly Compliance Audit Report

Naples Heritage

Date: April 2025 - 1st Quarter
Prepared for: Sandra Demarco
Developer: Inframark
Insurance agency:

Preparer:
Susan Morgan - *SchoolStatus Compliance*
ADA Website Accessibility and Florida F.S. 189.069 Requirements

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Compliance Audit Overview

The Community Website Compliance Audit (CWCA) consists of a thorough assessment of Florida Community Development District (CDD) websites to assure that specified district information is available and fully accessible. Florida Statute Chapter 189.069 states that effective October, 2015, every CDD in the state is required to maintain a fully compliant website for reporting certain information and documents for public access.

The CWCA is a reporting system comprised of quarterly audits and an annual summary audit to meet full disclosure as required by Florida law. These audits are designed to assure that CDDs satisfy all compliance requirements stipulated in Chapter 189.069.

Compliance Criteria

The CWCA focuses on the two primary areas – website accessibility as defined by U.S. federal laws, and the 16-point criteria enumerated in Florida Statute Chapter 189.069.



ADA Website Accessibility

Several federal statutes (American Disabilities Act, Sec. 504 and 508 of the Rehabilitation Act of 1973) require public institutions to ensure they are not discriminating against individuals on the basis of a person's disability. Community websites are required to conform to web content accessibility guidelines – WCAG 2.1, which is the international standard established to keep websites barrier-free and the recognized standard for ADA-compliance.



Florida Statute Compliance

Pursuant to F.S. 189.069, every CDD is required to maintain a dedicated website to serve as an official reporting mechanism covering, at minimum, 16 criteria. The information required to report and have fully accessible spans: establishment charter or ordinance, fiscal year audit, budget, meeting agendas and minutes and more. For a complete list of statute requirements, see page 3.

Audit Process

The Community Website Compliance Audit covers all CDD web pages and linked PDFs.* Following the WCAG 2.1 levels A, AA, and AAA for web content accessibility, a comprehensive scan encompassing 312 tests is conducted for every page. In addition, a human inspection is conducted to assure factors such as navigation and color contrasts meet web accessibility standards. See page 4 for complete accessibility grading criteria.

In addition to full ADA-compliance, the audit includes a 16-point checklist directly corresponding with the criteria set forth in Florida Statute Chapter 189.069. See page 5 for the complete compliance criteria checklist.

* **NOTE**: Because many CDD websites have links to PDFs that contain information required by law (meeting agendas, minutes, budgets, miscellaneous and ad hoc documents, etc.), audits include an examination of all associated PDFs. **PDF remediation** and ongoing auditing is critical to maintaining compliance.

ADA Website Accessibility

Result: PASSED

Accessibility Grading Criteria

Passed	Description
Passed	**Website errors*** **0** WCAG 2.1 errors appear on website pages causing issues**
Passed	**Keyboard navigation** The ability to navigate website without using a mouse
Passed	**Website accessibility policy** A published policy and a vehicle to submit issues and resolve issues
Passed	**Color contrast** Colors provide enough contrast between elements
Passed	**Video captioning** Closed-captioning and detailed descriptions
Passed	**PDF accessibility** Formatting PDFs including embedded images and non-text elements
Passed	**Site map** Alternate methods of navigating the website

*Errors represent less than 5% of the page count are considered passing
**Error reporting details are available in your Campus Suite Website Accessibility dashboard

Florida F.S. 189.069 Requirements

Result: PASSED

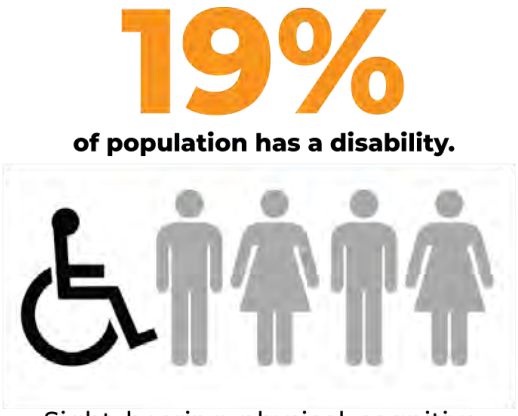
Compliance Criteria

Passed	Description
Passed	Full Name and primary contact specified
Passed	Public Purpose
Passed	Governing body Information
Passed	Fiscal Year
Passed	Full Charter (Ordinance and Establishment) Information
Passed	CDD Complete Contact Information
Passed	District Boundary map
Passed	Listing of taxes, fees, assessments imposed by CDD
Passed	Link to Florida Commission on Ethics
Passed	District Budgets (Last two years)
Passed	Complete Financial Audit Report
Passed	Listing of Board Meetings
Passed	Public Facilities Report, if applicable
Passed	Link to Financial Services
X	Meeting Agendas for the past year, and 1 week prior to next

Accessibility overview

Everyone deserves equal access.

With nearly 1-in-5 Americans having some sort of disability – visual, hearing, motor, cognitive – there are literally millions of reasons why websites should be fully accessible and compliant with all state and federal laws. Web accessibility not only keeps board members on the right side of the law, but enables the entire community to access all your web content. The very principles that drive accessible website design are also good for those without disabilities.



The legal and right thing to do

Several federal statutes (American Disabilities Act, Sec. 504 and 508 of the Rehabilitation Act of 1973) require public institutions to ensure they are not discriminating against individuals on the basis of a person's disability. Community websites are required to conform to web content accessibility guidelines, WCAG 2.1, the international standard established to keep websites barrier-free. Plain and simple, any content on your website must be accessible to everyone.



ADA Compliance Categories

Most of the problems that occur on a website fall in one or several of the following categories.



Contrast and colors

Some people have vision disabilities that hinder picking up contrasts, and some are color blind, so there needs to be a distinguishable contrast between text and background colors. This goes for buttons, links, text on images – everything. Consideration to contrast and color choice is also important for extreme lighting conditions.

Contract checker: *http://webaim.org/resources/contrastchecker*



Using semantics to format your HTML pages

When web page codes are clearly described in easy-to-understand terms, it enables broader sharing across all browsers and apps. This 'friendlier' language not only helps all the users, but developers who are striving to make content more universal on more devices.



Text alternatives for non-text content

Written replacements for images, audio and video should provide all the same descriptors that the non-text content conveys. Besides helping with searching, clear, concise word choice can make vivid non-text content for the disabled.

Helpful article: *http://webaim.org/techniques/alttext*



Ability to navigate with the keyboard

Not everyone can use a mouse. Blind people with many with motor disabilities have to use a keyboard to make their way around a website. Users need to be able to interact fully with your website by navigating using the tab, arrows and return keys only. A "skip navigation" option is also required. Consider using WAI-ARIA for improved accessibility, and properly highlight the links as you use the tab key to make sections.

Helpful article: *www.nngroup.com/articles/keyboard-accessibility*
Helpful article: *http://webaim.org/techniques/skipnav*



Easy to navigate and find information

Finding relevant content via search and easy navigation is a universal need. Alt text, heading structure, page titles, descriptive link text (no 'click here' please) are just some ways to help everyone find what they're searching for. You must also provide multiple ways to navigate such as a search and a site map.

Helpful article: *http://webaim.org/techniques/sitetools/*



Properly formatting tables

Tables are hard for screen readers to decipher. Users need to be able to navigate through a table one cell at a time. In addition to the table itself needing a caption, row and column headers need to be labeled and data correctly associated with the right header.

Helpful article: *http://webaim.org/techniques/tables/data*



Making PDFs accessible

PDF files must be tagged properly to be accessible, and unfortunately many are not. Images and other non-text elements within that PDF also need to be ADA-compliant. Creating anew is one thing; converting old PDFs – called PDF remediation – takes time.

Helpful articles: *http://webaim.org/techniques/acrobat/acrobat*



Making videos accessible

Simply adding a transcript isn't enough. Videos require closed captioning and detailed descriptions (e.g., who's on-screen, where they are, what they're doing, even facial expressions) to be fully accessible and ADA compliant.

Helpful article: *http://webaim.org/techniques/captions*



Making forms accessible

Forms are common tools for gathering info and interacting. From logging in to registration, they can be challenging if not designed to be web-accessible. How it's laid out, use of labels, size of clickable areas and other aspects need to be considered.

Helpful article: *http://webaim.org/techniques/forms*



Alternate versions

Attempts to be fully accessible sometimes fall short, and in those cases, alternate versions of key pages must be created. That is, it is sometimes not feasible (legally, technically) to modify some content. These are the 'exceptions', but still must be accommodated.



Feedback for users

To be fully interactive, your site needs to be able to provide an easy way for users to submit feedback on any website issues. Clarity is key for both any confirmation or error feedback that occurs while engaging the page.



Other related requirements

No flashing

Blinking and flashing are not only bothersome, but can be disorienting and even dangerous for many users. Seizures can even be triggered by flashing, so avoid using any flashing or flickering content.

Timers

Timed connections can create difficulties for the disabled. They may not even know a timer is in effect, it may create stress. In some cases (e.g., purchasing items), a timer is required, but for most school content, avoid using them.

Fly-out menus

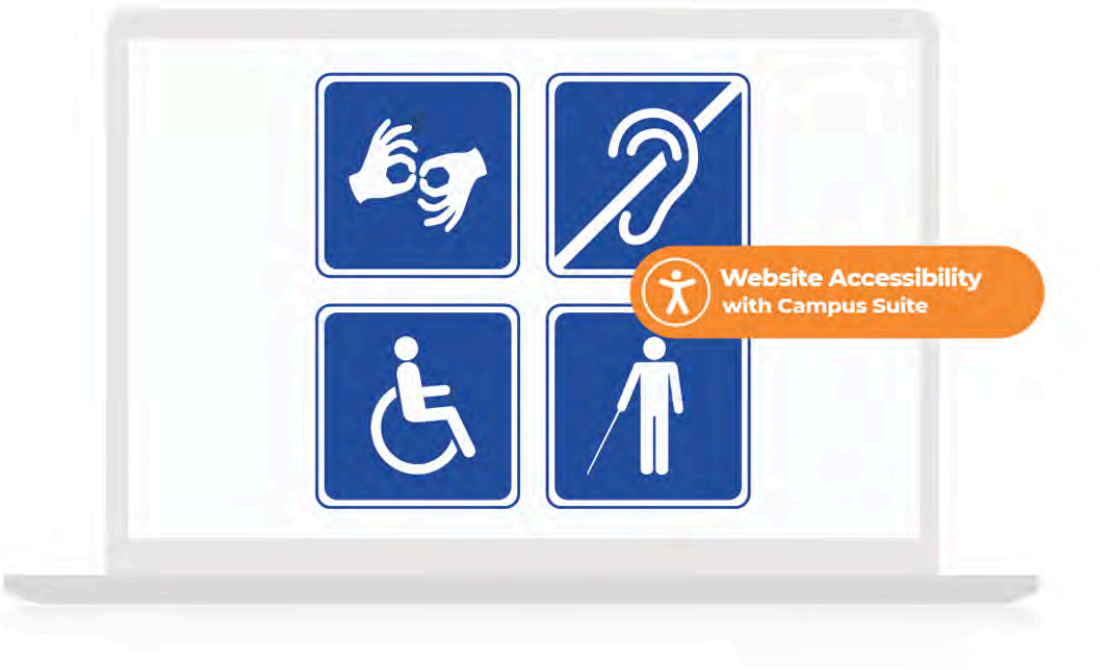
Menus that fly out or down when an item is clicked are helpful to dig deeper into the site's content, but they need to be available via keyboard navigation, and not immediately snap back when those using a mouse move from the clickable area.

No pop-ups

Pop-up windows present a range of obstacles for many disabled users, so it's best to avoid using them altogether. If you must, be sure to alert the user that a pop-up is about to be launched.

Web Accessibility Glossary

Assistive technology	Hardware and software for disabled people that enable them to perform tasks they otherwise would not be able to perform (e..g., a screen reader)
WCAG 2.0	Evolving web design guidelines established by the W3C that specify how to accommodate web access for the disabled
504	Section of the Rehabilitation Act of 1973 that protects civil liberties and guarantees certain rights of disabled people
508	An amendment to the Rehabilitation Act that eliminates barriers in information technology for the disabled
ADA	American with Disabilities Act (1990)
Screen reader	Software technology that transforms the on-screen text into an audible voice. Includes tools for navigating/accessing web pages.
Website accessibility	Making your website fully accessible for people of all abilities
W3C	World Wide Web Consortium – the international body that develops standards for using the web



Quarterly Compliance Audit Report

Naples Heritage

Date: July 2025 - 2nd Quarter
Prepared for: Sandra Demarco
Developer: Inframark
Insurance agency:

Preparer:
Susan Morgan - *SchoolStatus Compliance*
ADA Website Accessibility and Florida F.S. 189.069 Requirements

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Audit Process

The Community Website Compliance Audit covers all CDD web pages and linked PDFs.* Following the WCAG 2.1 levels A, AA, and AAA for web content accessibility, a comprehensive scan encompassing 312 tests is conducted for every page. In addition, a human inspection is conducted to assure factors such as navigation and color contrasts meet web accessibility standards. See page 4 for complete accessibility grading criteria.

In addition to full ADA-compliance, the audit includes a 16-point checklist directly corresponding with the criteria set forth in Florida Statute Chapter 189.069. See page 5 for the complete compliance criteria checklist.

* **NOTE**: Because many CDD websites have links to PDFs that contain information required by law (meeting agendas, minutes, budgets, miscellaneous and ad hoc documents, etc.), audits include an examination of all associated PDFs. **PDF remediation** and ongoing auditing is critical to maintaining compliance.

ADA Website Accessibility

Result: PASSED

Accessibility Grading Criteria

Passed	Description
Passed	**Website errors*** **0** WCAG 2.1 errors appear on website pages causing issues**
Passed	**Keyboard navigation** The ability to navigate website without using a mouse
Passed	**Website accessibility policy** A published policy and a vehicle to submit issues and resolve issues
Passed	**Color contrast** Colors provide enough contrast between elements
Passed	**Video captioning** Closed-captioning and detailed descriptions
Passed	**PDF accessibility** Formatting PDFs including embedded images and non-text elements
Passed	**Site map** Alternate methods of navigating the website

*Errors represent less than 5% of the page count are considered passing
**Error reporting details are available in your Campus Suite Website Accessibility dashboard

Florida F.S. 189.069 Requirements

Result: PASSED

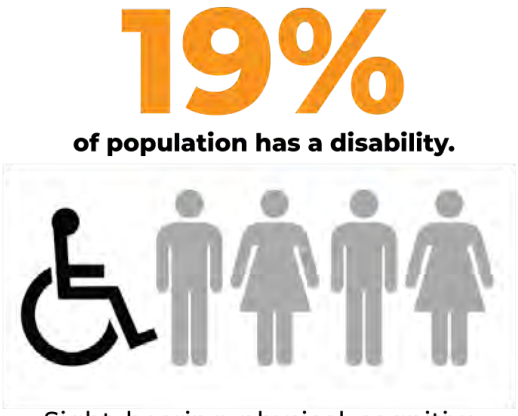
Compliance Criteria

Passed	Description
Passed	Full Name and primary contact specified
Passed	Public Purpose
Passed	Governing body Information
Passed	Fiscal Year
Passed	Full Charter (Ordinance and Establishment) Information
Passed	CDD Complete Contact Information
Passed	District Boundary map
Passed	Listing of taxes, fees, assessments imposed by CDD
Passed	Link to Florida Commission on Ethics
Passed	District Budgets (Last two years)
Passed	Complete Financial Audit Report
Passed	Listing of Board Meetings
Passed	Public Facilities Report, if applicable
Passed	Link to Financial Services
X	Meeting Agendas for the past year, and 1 week prior to next

Accessibility overview

Everyone deserves equal access.

With nearly 1-in-5 Americans having some sort of disability – visual, hearing, motor, cognitive – there are literally millions of reasons why websites should be fully accessible and compliant with all state and federal laws. Web accessibility not only keeps board members on the right side of the law, but enables the entire community to access all your web content. The very principles that drive accessible website design are also good for those without disabilities.



The legal and right thing to do

Several federal statutes (American Disabilities Act, Sec. 504 and 508 of the Rehabilitation Act of 1973) require public institutions to ensure they are not discriminating against individuals on the basis of a person's disability. Community websites are required to conform to web content accessibility guidelines, WCAG 2.1, the international standard established to keep websites barrier-free. Plain and simple, any content on your website must be accessible to everyone.



ADA Compliance Categories

Most of the problems that occur on a website fall in one or several of the following categories.



Contrast and colors

Some people have vision disabilities that hinder picking up contrasts, and some are color blind, so there needs to be a distinguishable contrast between text and background colors. This goes for buttons, links, text on images – everything. Consideration to contrast and color choice is also important for extreme lighting conditions.

Contract checker: *http://webaim.org/resources/contrastchecker*



Using semantics to format your HTML pages

When web page codes are clearly described in easy-to-understand terms, it enables broader sharing across all browsers and apps. This 'friendlier' language not only helps all the users, but developers who are striving to make content more universal on more devices.



Text alternatives for non-text content

Written replacements for images, audio and video should provide all the same descriptors that the non-text content conveys. Besides helping with searching, clear, concise word choice can make vivid non-text content for the disabled.

Helpful article: *http://webaim.org/techniques/alttext*



Ability to navigate with the keyboard

Not everyone can use a mouse. Blind people with many with motor disabilities have to use a keyboard to make their way around a website. Users need to be able to interact fully with your website by navigating using the tab, arrows and return keys only. A "skip navigation" option is also required. Consider using WAI-ARIA for improved accessibility, and properly highlight the links as you use the tab key to make sections.

Helpful article: *www.nngroup.com/articles/keyboard-accessibility*
Helpful article: *http://webaim.org/techniques/skipnav*



Easy to navigate and find information

Finding relevant content via search and easy navigation is a universal need. Alt text, heading structure, page titles, descriptive link text (no 'click here' please) are just some ways to help everyone find what they're searching for. You must also provide multiple ways to navigate such as a search and a site map.

Helpful article: *http://webaim.org/techniques/sitetools/*



Properly formatting tables

Tables are hard for screen readers to decipher. Users need to be able to navigate through a table one cell at a time. In addition to the table itself needing a caption, row and column headers need to be labeled and data correctly associated with the right header.

Helpful article: *http://webaim.org/techniques/tables/data*



Making PDFs accessible

PDF files must be tagged properly to be accessible, and unfortunately many are not. Images and other non-text elements within that PDF also need to be ADA-compliant. Creating anew is one thing; converting old PDFs – called PDF remediation – takes time.

Helpful articles: *http://webaim.org/techniques/acrobat/acrobat*



Making videos accessible

Simply adding a transcript isn't enough. Videos require closed captioning and detailed descriptions (e.g., who's on-screen, where they are, what they're doing, even facial expressions) to be fully accessible and ADA compliant.

Helpful article: *http://webaim.org/techniques/captions*



Making forms accessible

Forms are common tools for gathering info and interacting. From logging in to registration, they can be challenging if not designed to be web-accessible. How it's laid out, use of labels, size of clickable areas and other aspects need to be considered.

Helpful article: *http://webaim.org/techniques/forms*



Alternate versions

Attempts to be fully accessible sometimes fall short, and in those cases, alternate versions of key pages must be created. That is, it is sometimes not feasible (legally, technically) to modify some content. These are the 'exceptions', but still must be accommodated.



Feedback for users

To be fully interactive, your site needs to be able to provide an easy way for users to submit feedback on any website issues. Clarity is key for both any confirmation or error feedback that occurs while engaging the page.



Other related requirements

No flashing

Blinking and flashing are not only bothersome, but can be disorienting and even dangerous for many users. Seizures can even be triggered by flashing, so avoid using any flashing or flickering content.

Timers

Timed connections can create difficulties for the disabled. They may not even know a timer is in effect, it may create stress. In some cases (e.g., purchasing items), a timer is required, but for most school content, avoid using them.

Fly-out menus

Menus that fly out or down when an item is clicked are helpful to dig deeper into the site's content, but they need to be available via keyboard navigation, and not immediately snap back when those using a mouse move from the clickable area.

No pop-ups

Pop-up windows present a range of obstacles for many disabled users, so it's best to avoid using them altogether. If you must, be sure to alert the user that a pop-up is about to be launched.

Web Accessibility Glossary

Assistive technology	Hardware and software for disabled people that enable them to perform tasks they otherwise would not be able to perform (e..g., a screen reader)
WCAG 2.0	Evolving web design guidelines established by the W3C that specify how to accommodate web access for the disabled
504	Section of the Rehabilitation Act of 1973 that protects civil liberties and guarantees certain rights of disabled people
508	An amendment to the Rehabilitation Act that eliminates barriers in information technology for the disabled
ADA	American with Disabilities Act (1990)
Screen reader	Software technology that transforms the on-screen text into an audible voice. Includes tools for navigating/accessing web pages.
Website accessibility	Making your website fully accessible for people of all abilities
W3C	World Wide Web Consortium – the international body that develops standards for using the web

Sixth Order of Business

6B.i.

AIM Engineering & Surveying, Inc.

Corporate Office
2161 Fowler Street
Suite 100
Fort Myers, FL 33901

239-332-4569
800-226-4569
www.aimengr.com

Successfully providing our clients and the community with quality planning, engineering and surveying since 1980.

October 6, 2025

Jamie W. Rivera, PE, CFM
Project Manager
AIM Engineering & Surveying, Inc.
P: 239.265.1769 | O: 239.284.1901 | Email: jrivera@aimengr.com

Dear Jamie W. Rivera,

RE: SUE Proposal - Naples Heritage

SCOPE OF SERVICE:

- Locate all sanitary manholes within the area outlined in blue on the attached Exhibit A and record the pipe size, material, and invert information for each manhole.
- Locate all visible above-grade cleanouts adjacent to the buildings and record the pipe size, material, and invert information for each cleanout.
- All data will be collected using Real-Time Kinematic Global Positioning System (RTK-GPS) equipment. Horizontal data will be referenced to the North American Datum of 1983 (2011 Adjustment), State Plane Coordinate System, Florida East Zone, and vertical data will be referenced to the North American Vertical Datum of 1988 (NAVD88).

Total Cost of SUE Services: $2,239.00

CLOSING

Thank you for the opportunity to provide these Professional Subsurface Utility Engineering (SUE) Services. If there are any questions, please do not hesitate to contact the undersigned.

We look forward to working with you now and in the future.

Sincerely,

Jesse Warner
SUE/Survey Project Manager
AIM Engineering & Surveying, Inc.
Office: 239.284.1913
Cell: 239.910.1657
jwarner@aimengr.com

Exhibit A



6Cia

INFRAMARK
COMMUNITY MANAGEMENT

Memorandum

To: Board of Supervisors

From: District Management

Date: 11/5/24

RE: HB7013 – Special Districts Performance Measures and Standards

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To enhance accountability and transparency, new regulations were established for all special districts, by the Florida Legislature, during its 2024 legislative session. Starting on October 1, 2024, or by the end of the first full fiscal year after its creation (whichever comes later), each special district must establish goals and objectives for each program and activity, as well as develop performance measures and standards to assess the achievement of these goals and objectives. Additionally, by December 1 each year (initial report due on December 1, 2025), each special district is required to publish an annual report on its website, detailing the goals and objectives achieved, the performance measures and standards used, and any goals or objectives that were not achieved.

District Management has identified the following key categories to focus on for Fiscal Year 2025 and develop statutorily compliant goals for each:

- Community Communication and Engagement
- Infrastructure and Facilities Maintenance
- Financial Transparency and Accountability

Additionally, special districts must provide an annual reporting form to share with the public that reflects whether the goals and objectives were met for the year. District Management has streamlined these requirements into a single document that meets both the statutory requirements for goal/objective setting and annual reporting.

The proposed goals/objectives and the annual reporting form are attached as Exhibit A to this memo. District Management recommends that the Board of Supervisors adopt these goals and objectives to maintain compliance with HB7013 and further enhance its commitment to the accountability and transparency of the District.

Exhibit A:

Goals, Objectives, and Annual Reporting Form

Naples Heritage Community Development District ("District")
Performance Measures/Standards & Annual Reporting Form

October 1, 2024 – September 30, 2025

1. Community Communication and Engagement

Goal 1.1: Public Meetings Compliance

Objective: Hold at least two regular Board of Supervisor ("Board") meetings per year to conduct District-related business and discuss community needs.
Measurement: Number of public Board meetings held annually as evidenced by meeting minutes and legal advertisements.
Standard: A minimum of two Board meetings were held during the fiscal year.
Achieved: Yes ☒ No ☐

Goal 1.2: Notice of Meetings Compliance

Objective: Provide public notice of each meeting in accordance with Florida Statutes, using at least two communication methods.
Measurement: Timeliness and method of meeting notices as evidenced by posting to the District's website and publishing in a local newspaper of general circulation.
Standard: 100% of meetings were advertised in accordance with Florida Statutes on at least two mediums (e.g., newspaper and District website).
Achieved: Yes ☒ No ☐

Goal 1.3: Access to Records Compliance

Objective: Ensure that meeting minutes and other public records are readily available and accessible to the public pursuant to applicable law by completing quarterly District website checks.
Measurement: Quarterly website reviews will be completed to ensure public records are up to date as evidenced by District Management's records.
Standard: 100% of quarterly website checks were completed by District Management or third party vendor.
Achieved: Yes ☒ No ☐

2. Infrastructure and Facilities Maintenance

Goal 2.1: Field Management and/or District Management Site Inspections Objective: Field manager and/or district manager will conduct a minimum of one inspection per year.
Measurement: Field manager and/or district manager visits were successfully completed as evidenced by field manager and/or district manager's reports, notes or other record keeping method.
Standard: 100% of site visits were successfully completed.
Achieved: Yes ☒ No ☐

Goal 2.2: District Infrastructure and Facilities Inspections

Objective: District Engineer will conduct an annual inspection of the District's infrastructure and related systems.
Measurement: A minimum of one inspection completed per year as evidenced by district engineer's report related to District's infrastructure and related systems.

Standard: Minimum of one inspection was completed in the fiscal year by the District's engineer.

Achieved: Yes ☐ No ☐

3. Financial Transparency and Accountability

Goal 3.1: Annual Budget Preparation

Objective: Prepare and approve the annual proposed budget by June 15 and final budget by September 15 each year.

Measurement: Proposed budget was approved by the Board by June 15 and final budget was adopted by September 15 as evidenced by meeting minutes and budget documents listed on the District's website and/or within District records.

Standard: 100% of budget approval & adoption were completed by the statutory deadlines and posted to the District's website.

Achieved: Yes ☒ No ☐

Goal 3.2: Financial Reports

Objective: Publish to the District's website (or link as permitted by applicable law) the most recent versions of the following documents: Annual audit, current fiscal year budget with any amendments, and most recent financials within the latest agenda package.

Measurement: Annual audit, previous years' budgets, and financials are accessible to the public as evidenced by corresponding documents on the District's website.

Standard: District's website contains 100% of the following information: Most recent annual audit, most recent adopted/amended fiscal year budget, and most recent agenda package with updated financials.

Achieved: Yes ☒ No ☐

Goal 3.3: Annual Financial Audit

Objective: Conduct an annual independent financial audit per statutory requirements and publish the results to the District's website for public inspection, and transmit to the State of Florida.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing Board approval and annual audit is available on the District's website (or linked) and transmitted to the State of Florida.

Standard: Audit was completed by an independent auditing firm per statutory requirements and results were posted to the District's website and transmitted to the State of Florida.

Achieved: Yes ☒ No ☐

SIGNATURES:

Chair/Vice Chair: _____ Date: _____

Printed Name: _____

Naples Heritage Community Development District

District Manager: _____ Date: _____

Printed Name: _____

Naples Heritage Community Development District

6D.

SOLITUDE LAKE MANAGEMENT

		Account	Naples Heritage CDD - F&A
Work Order	00834597	Contact	Justin Faircloth
Work Order Number	00834597	Address	8150 Heritage Club Way Naples, FL 34112 United States
Created Date	7/10/2025		

Work Details

Specialist Comments to Customer	Naples heritage Naples Cabinet #1 Cabinet was tripped When arrive I reset the gfci Cleaned Adjusted valves All air stations are up and running Cabinet #2 Cleaned Changed Filter Adjusted valves All air stations are up and running Cabinet #3 Clean Changed Filter Adjusted valves All air stations are up and running Cabinet #4 Clean Changed Filter Adjusted valves All air stations are up and running Cabinet#12 Changed Filter Adjusted valves All air stations are up and running Cabinet #11 Adjusted valves Changed Filter All air stations are up and running. Cabinet #15 Clean Changed Filter Adjusted valves Everything is up and running	Prepared By	Christopher Encarnacion

SOLITUDE LAKE MANAGEMENT

		Account	Naples Heritage CDD - F&A
Work Order	00834597	Contact	Justin Faircloth
Work Order Number	00834597	Address	8150 Heritage Club Way Naples, FL 34112 United States
Created Date	7/10/2025		

Cabinet 14
Changed Filter
Adjusted valves
2 defuser are week Recommend 2 new defuser

Cabinet #6
Waiting on Cabinet to come in for install

Cabinet #9
Clean
Changed Filter
Adjusted valves
All air stations are up and running

Clean fountain
Checked panel
Everything is up and running upon departure

Work Order Assets

Asset	Status	Product Work Type
Naples Herit AQUA FTN 1 Site #14(DNU)	Inspected	

Service Parameters

Asset	Product Work Type	Specialist Comments to Customer
Naples Herit AQUA FTN 1 Site #14(DNU)	CHECK POWER CABLE	
Naples Herit AQUA FTN 1 Site #14(DNU)	PANEL COMPONENT CHECK	
Naples Herit AQUA FTN 1 Site #14(DNU)	LIGHTING INSPECTION (IF APPLICABLE)	
Naples Herit AQUA FTN 1 Site #14(DNU)	FOUNTAIN FUNCTIONALITY	
Naples Herit AQUA FTN 1 Site #14(DNU)		

SOLITUDE LAKE MANAGEMENT

		Account	Naples Heritage CDD - F&A
Work Order	00838652	Contact	Justin Faircloth
Work Order Number	00838652	Address	8150 Heritage Club Way Naples, FL 34112 United States
Created Date	7/18/2025		

Work Details

Prepared By: Miguel Alma

Specialist Comments to Customer:

Cabinet #1
Cabinet was tripped When arrive
I reset the gfci
Cleaned
Adjusted valves
All air stations are up and running

Cabinet #2
Cleaned
Changed Filter
Adjusted valves
All air stations are up and running

Cabinet #3
Clean
Changed Filter
Adjusted valves
All air stations are up and running

Cabinet #4
Clean
Changed Filter
Adjusted valves
All air stations are up and running

Cabinet#12
Changed Filter
Adjusted valves
All air stations are up and running

Cabinet #11
Adjusted valves
Changed Filter
All air stations are up and running.

Cabinet #15
Clean
Changed Filter
Adjusted valves
Everything is up and running

Cabinet 14
Changed Filter

SOLITUDE LAKE MANAGEMENT

		Account	Naples Heritage CDD - F&A
Work Order	00838652	Contact	Justin Faircloth
Work Order Number	00838652	Address	8150 Heritage Club Way Naples, FL 34112 United States
Created Date	7/18/2025		

Adjusted valves
2 defuser are week Recommend 2 new defuser

Cabinet #6
Waiting on Cabinet to come in for install

Cabinet #9
Clean
Changed Filter
Adjusted valves
All air stations are up and running

Work Order Assets

Asset	Status	Product Work Type
Naples Herit VTX Aerator 3 Site #2	Inspected	
Naples Herit VTX Aerator 4 Site #4	Inspected	
Naples Herit VTX Aerator 1 Site #16	Inspected	
Naples Herit VTX Aerator 2 Site #17	Inspected	
Naples Herit VTX Aerator 5 Site #1	Inspected	

Service Parameters

Asset	Product Work Type	Specialist Comments to Customer
Naples Herit VTX Aerator 5 Site #1	DIFFUSER OPERATION	
Naples Herit VTX Aerator 5 Site #1	CABINET OPERATION	
Naples Herit VTX Aerator 4 Site #4	DIFFUSER OPERATION	
Naples Herit VTX Aerator 4 Site #4	CABINET OPERATION	
Naples Herit VTX Aerator 3 Site #2	DIFFUSER OPERATION	
Naples Herit VTX Aerator 3 Site #2	CABINET OPERATION	
Naples Herit VTX Aerator 2 Site #17	DIFFUSER OPERATION	
Naples Herit VTX Aerator 2 Site #17	CABINET OPERATION	
Naples Herit VTX Aerator 1 Site #16	DIFFUSER OPERATION	
Naples Herit VTX Aerator 1 Site #16	CABINET OPERATION	
Naples Herit VTX Aerator 5 Site #1		
Naples Herit VTX Aerator 2 Site #17		
Naples Herit VTX Aerator 1 Site #16		
Naples Herit VTX Aerator 4 Site #4		
Naples Herit VTX Aerator 3 Site #2		

SOLITUDE LAKE MANAGEMENT

		Account	Naples Heritage CDD - F&A
Work Order	00856365	Contact	Justin Faircloth
Work Order Number	00856365	Address	7503 Arbor Lake Court Naples, FL 34112 United States
Created Date	7/23/2025		

Work Details

Specialist Comments to Customer	All repair were completed Everything is up and running upon departure	Prepared By	Christopher Encarnacion

Work Order Assets

Asset	Status	Product Work Type
Naples Heritage - Aerator #6 Lake #6	Included	

Service Parameters

Asset	Product Work Type	Specialist Comments to Customer
Naples Heritage - Aerator #6 Lake #6		

SOLITUDE LAKE MANAGEMENT

		Account	Naples Heritage CDD - F&A
Work Order	00856883	Contact	Justin Faircloth
Work Order Number	00856883	Address	7503 Arbor Lake Court Naples, FL 34112 United States
Created Date	7/22/2025		

Work Details

Specialist Comments to Customer	In todays visit we Installed New compressor And completed all repairs All air stations are up and running upon departure	Prepared By	Christopher Encarnacion

Work Order Assets

Asset	Status	Product Work Type
Naples Heritage - Aerator #6 Lake #6	Included	

Service Parameters

Asset	Product Work Type	Specialist Comments to Customer
Naples Heritage - Aerator #6 Lake #6		

Seventh Order of Business

7A

MINUTES OF MEETING
NAPLES HERITAGE
COMMUNITY DEVELOPMENT DISTRICT

The regular meeting of the Board of Supervisors of the Naples Heritage Community Development District was held Tuesday, May 6, 2025 at 9:00 a.m. at the Naples Heritage Golf & Country Club Clubhouse, located at 8150 Heritage Club Way, Naples, Florida 34112.

Present and constituting a quorum were:

Kenneth Gaynor	Chairperson
Gordon Mettam	Vice Chairperson ***(Remotely)***
Gary Lukens	Assistant Secretary
Georgiann Schulte	Assistant Secretary
Philip Smith	Assistant Secretary

Also present were:

Justin Faircloth	District Manager
Greg Urbancic	District Counsel
Chris Gant	Naples Heritage Golf & Country Club
Chad Montgomery	Naples Heritage Golf & Country Club
Tim Richards	Naples Heritage Golf & Country Club
Dale Pekarek	Cypress Point
Jamie Wilson	AIM Engineering & Surveying, Inc.
Russell C.	Safety & Signage for Naples Heritage Golf & Country Club

Following is a summary of the discussions and actions taken.

FIRST ORDER OF BUSINESS **Call to Order and Roll Call**

Mr. Faircloth called the meeting to order, and called the roll. A quorum was established.

> On MOTION by Mr. Lukens, seconded by Mr. Smith, with all in favor, Mr. Mettam was authorized to attend the meeting and vote remotely. (4-0)

SECOND ORDER OF BUSINESS **Approval of Agenda**

The following items were requested:

- Cypress Point Street Parking, as Item 5Aii.
- Valencia Sky Fence as Item 5B, with remaining items to move down on the list.

The Board was in agreement to accept the agenda, as presented above.

THIRD ORDER OF BUSINESS **Public Comment on Agenda Items**

There being no public comments on agenda items, the next order of business followed.

FOURTH ORDER OF BUSINESS **Public Hearing to Consider Adoption of the Fiscal Year 2026 Budget**

A. Opening of Public Hearing for Public Comments

The Hearing was opened.

- There were no comments on the Fiscal Year 2026 Budget.

B. Closing of Public Hearing for Public Comments

The Hearing was closed.

C. Consideration of Resolution 2025-03, Adopting the Fiscal Year 2026 Budget

There being no comments or questions,

> On MOTION by Mr. Smith, seconded by Mr. Lukens, with all in favor, Resolution 2025-03, Relating to the Annual Appropriations of the District and Adopting the Budget for the Fiscal Year Beginning October 1, 2025, and Ending September 30, 2026, and Referencing the Maintenance Benefit and Special Assessments to be Levied by the District for Said Fiscal Year; Providing for an Effective Date, was adopted. (5-0)

D. Consideration of Resolution 2025-04, Levying Assessments for Fiscal Year 2026

There being no comments or questions,

> On MOTION by Ms. Schulte, seconded by Mr. Mettam, with all in favor, Resolution 2025-04, Levying and Imposing Non-Ad Valorem Maintenance Special Assessments, and Certifying an Assessment Roll for Fiscal Year 2025-26; Providing a Severability Clause; Providing for Conflict and Providing an Effective Date, was adopted. (5-0)

FIFTH ORDER OF BUSINESS Business Items

A. Club Updates

i. Colonial Court Fence Installation

- Mr. Gaynor noted the fence installation was completed, and the invoice should be paid.

ii. Cypress Point Street Parking

- Mr. Pekarek discussed the issue of the Fire Department not being able to get through the street due to cars being parked on both sides of the road. Discussion ensued. It was agreed that the Club and the Associations would address this concern in the community.

B. Valencia Sky Fence

> On MOTION by Mr. Mettam, seconded by Ms. Schulte, with all in favor, the District was authorized to reimburse the developer of Valencia Sky for the District's fence repairs they completed through their subcontractor. (5-0)

C. Fiscal Year 2025 Lake Bank Restoration Update

- Mr. Montgomery noted that Pristine Lakes and Wetlands, LLC were planning to start the work next week.
- Mr. Gaynor commented on trees that were removed before the summer storm season.

> On MOTION by Mr. Mettam, seconded by Mr. Smith, with all in favor, payment of Invoice 023530REV from Bushwood Tree Company, LLC in the amount of $4,047.50 was approved. (5-0)

- Mr. Faircloth noted the Club needed to invoice the District for the fence installation along Colonial Court.
- Mr. Faircloth reviewed the Annual Field Management Report that was just completed with the Board and club staff.
- The Board requested Mr. Faircloth call the neighboring community, Firano, regarding invasive exotic trees on their property impacting the District's preserves.

D. Report on Number of Registered Voters (582)

- Mr. Faircloth noted that the number of registered voters was 582, as reported by County staff.

SIXTH ORDER OF BUSINESS Staff Reports

A. District Attorney

i. Collier County Update – Stoneybrook Drive/Tract J4

- Mr. Gaynor noted he followed up with County staff and a response was due later in the week.

B. District Engineer

i. District Engineering Services RFQ Update

- Mr. Faircloth introduced Ms. Jamie Wilson to the Board and noted the neighboring District Engineer for Cedar Hammock CDD, Mr. Sam Marshall, was also retiring and had introduced him to Ms. Wilson. Ms. Wilson was invited to provide comments regarding herself, her experience, and her firm.

> On MOTION by Mr. Lukens, seconded by Mr. Mettam, with all in favor, negotiations shall commence with AIM Engineering & Surveying, Inc. for District Engineering Services, and the Chairperson was authorized to enter into a contract with AIM Engineering & Surveying, Inc., subject to staff review. (5-0)

- Mr. Faircloth noted another RFQ may be required, but he would follow up with Mr. Urbancic.

C. District Manager

i. Follow-Up Items

Mr. Faircloth reviewed action items with the Board.

D. SOLitude Lake Management Service Reports

i. SOLitude Quote 00011960

This item was not addressed.

SEVENTH ORDER OF BUSINESS Business Administration

A. Approval of Minutes of the April 1, 2025 Meeting

There being no additions, corrections or deletions,

> On MOTION by Mr. Smith, seconded by Mr. Lukens, with all in favor, the Minutes of the April 1, 2025 Meeting were approved. (5-0)

B. Acceptance of Financial Report as of March 31, 2025

There being no comments or questions,

> On MOTION by Mr. Smith, seconded by Ms. Schulte, with all in favor, the Financial Report as of March 31, 2025 was accepted. (5-0)

C. Expenses Approved Under Resolution 2021-01

There being no expenses to be approved, the next order of business followed.

EIGHTH ORDER OF BUSINESS Supervisor Comments

A. Supervisor Gaynor

There being no comments, the next item followed.

B. Supervisor Mettam

- Mr. Mettam commented about the finances, budget, and the age of the District's infrastructure, noting he believed the Board was handling everything favorably.

C. Supervisor Schulte

- Ms. Schulte noted she was looking forward to hearing back from the County regarding utility concerns.

D. Supervisor Lukens

E. Supervisor Smith

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

NINTH ORDER OF BUSINESS Audience Comments

- Residents commented on lake bank restoration.

TENTH ORDER OF BUSINESS Adjournment

- Mr. Gaynor thanked everyone for their partnership and the work they do for the community, and wished them a great summer.

There being no further business, the meeting was adjourned at 10:34 a.m.

_____

Kenneth Gaynor
Chairperson

7B.

NAPLES HERITAGE

Community Development District

Financial Report

September 30, 2025

Prepared by

INFRAMARK
INFRASTRUCTURE MANAGEMENT SERVICES

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Check Register ..... Page 6

NAPLES HERITAGE

Community Development District

Financial Statements

(Unaudited)

September 30, 2025

NAPLES HERITAGE
Community Development District

General Fund

Balance Sheet
September 30, 2025

ACCOUNT DESCRIPTION		TOTAL
ASSETS		
Cash - Checking Account	$	58,284
Due From Other Gov'tl Units		35
Investments:		
Money Market Account		48,591
Deposits		560
TOTAL ASSETS	**$**	**107,470**
LIABILITIES		
Accounts Payable	$	9,693
TOTAL LIABILITIES		**9,693**
FUND BALANCES		
Nonspendable:		
Deposits		560
Assigned to:		
Operating Reserves		18,457
Reserves - Fountains		1,400
Reserves - Road and Lakes		46,760
Unassigned:		30,600
TOTAL FUND BALANCES	**$**	**97,777**
TOTAL LIABILITIES & FUND BALANCES	**$**	**107,470**

Statement of Revenues, Expenditures and Changes in Fund Balances

For the Period Ending September 30, 2025

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE ($) FAV(UNFAV)	YTD ACTUAL AS A %OF ADOPTED BUD	SEP-25 BUDGET	SEP-25 ACTUAL
REVENUES							
Interest - Investments	$ 240	$ 240	$ 7,702	$ 7,462	3209.17%	$ 20	$ 374
Interest - Tax Collector	-	-	278	278	0.00%	-	-
Special Assmnts- Tax Collector	199,750	199,750	199,750	-	100.00%	-	-
Special Assmnts- Discounts	(7,990)	(7,990)	(7,256)	734	90.81%	-	-
TOTAL REVENUES	**192,000**	**192,000**	**200,474**	**8,474**	**104.41%**	**20**	**374**
EXPENDITURES							
Administration							
P/R-Board of Supervisors	5,000	5,000	3,800	1,200	76.00%	-	-
FICA Taxes	383	383	291	92	75.98%	-	-
ProfServ-Engineering	2,000	2,000	-	2,000	0.00%	167	-
ProfServ-Field Management	950	950	-	950	0.00%	950	-
ProfServ-Legal Services	3,500	3,500	6,997	(3,497)	199.91%	292	529
ProfServ-Mgmt Consulting	26,221	26,221	26,221	-	100.00%	2,185	2,185
ProfServ-Property Appraiser	2,996	2,996	994	2,002	33.18%	-	-
ProfServ-Web Site Maintenance	758	758	758	-	100.00%	63	63
Auditing Services	3,200	3,200	3,200	-	100.00%	-	-
Postage and Freight	750	750	1,438	(688)	191.73%	63	-
Insurance - General Liability	9,688	9,688	9,557	131	98.65%	-	-
Printing and Binding	720	720	217	503	30.14%	60	-
Legal Advertising	2,400	2,400	3,424	(1,024)	142.67%	200	-
Misc-Assessment Collection Cost	3,995	3,995	3,852	143	96.42%	-	-
Misc-Contingency	1,353	1,353	220	1,133	16.26%	113	-
Misc-Web Hosting	1,823	1,823	1,164	659	63.85%	152	388
Office Expense	250	250	300	(50)	120.00%	21	-
Annual District Filing Fee	175	175	175	-	100.00%	-	-
Total Administration	66,162	66,162	62,608	3,554	94.63%	4,266	3,165
Field							
Contracts-Fountain	737	737	737	-	100.00%	61	-
Contracts-Aerator Maintenance	3,550	3,550	2,248	1,302	63.32%	296	-
Electricity - Aerator	10,000	10,000	7,819	2,181	78.19%	833	641
R&M-Fence	480	480	8,305	(7,825)	1730.21%	40	-
R&M-Lake	55,000	55,000	34,100	20,900	62.00%	4,583	-
Misc-Contingency	16,886	16,886	37,486	(20,600)	221.99%	1,407	8,600
Capital Outlay	11,645	11,645	11,645	-	100.00%	970	-
Total Field	98,298	98,298	102,340	(4,042)	104.11%	8,190	9,241
Reserves							
Reserve - Fountain	200	200	-	200	0.00%	-	-
Reserve - Roads and Lakes	27,340	27,340	34,100	(6,760)	124.73%	-	-
Total Reserves	27,540	27,540	34,100	(6,560)	123.82%	-	-
TOTAL EXPENDITURES & RESERVES	**192,000**	**192,000**	**199,048**	**(7,048)**	**103.67%**	**12,456**	**12,406**

Statement of Revenues, Expenditures and Changes in Fund Balances

For the Period Ending September 30, 2025

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE BUDGET	YEAR TO DATE ACTUAL	VARIANCE ($) FAV(UNFAV)	YTD ACTUAL AS A %OF ADOPTED BUD	SEP-25 BUDGET	SEP-25 ACTUAL
Excess (deficiency) of revenues Over (under) expenditures	-	-	1,426	1,426	0.00%	(12,436)	(12,032)
Net change in fund balance	$ -	$ -	$ 1,426	$ 1,426	0.00%	$ (12,436)	$ (12,032)
FUND BALANCE, BEGINNING (OCT 1, 20	**96,351**	**96,351**	**96,351**				
FUND BALANCE, ENDING	**$ 96,351**	**$ 96,351**	**$ 97,777**				

NAPLES HERITAGE

Community Development District

Supporting Schedules

September 30, 2025

NAPLES HERITAGE
Community Development District

Non-Ad Valorem Special Assessments - Collier County Tax Collector
Monthly Collection Distributions
For the Fiscal Year Ending September 30, 2025

Date Received	Net Amount Received	Discount / (Penalties) Amount	Collection Costs	Gross Amount Received
Assessments Levied				$ 199,750
Allocation %				100%
10/31/24	$ 900	$ 51	$ 18	$ 969
11/08/24	1,411	60	29	1,500
11/14/24	21,638	920	442	23,000
11/21/24	29,635	1,260	605	31,500
12/05/24	82,085	3,490	1,675	87,250
12/09/24	4,704	200	96	5,000
12/12/24	17,201	698	351	18,250
12/24/24	5,230	168	107	5,505
01/09/25	5,889	186	120	6,195
02/07/25	7,486	177	153	7,816
03/06/25	4,608	48	94	4,750
04/07/25	4,915	-	100	5,015
05/08/25	505	-	10	515
06/09/25	1,009	-	21	1,030
06/23/25	1,514	-	31	1,545.00
TOTAL	**$ 188,730**	**$ 7,258**	**$ 3,852**	**$ 199,750**

% COLLECTED 100.0%

TOTAL OUTSTANDING	**$ -**

Cash and Investment Balances
September 30, 2025

ACCOUNT NAME	BANK NAME	YIELD	MATURITY	BALANCE
GENERAL FUND				
Checking Account - Operating	Valley National	4.33%	N/A	58,284
Money Market Account	BankUnited	4.07.%	N/A	48,591
			Total	**$ 106,875**

NAPLES HERITAGE COMMUNITY DEVELOPMENT DISTRICT

Payment Register by Fund

For the Period from 09/01/25 to 09/30/25

(Sorted by Check / ACH No.)

Fund No.	Check / ACH No.	Date	Payee	Invoice No.	Payment Description	Invoice / GL Description	G/L Account #	Amount Paid
GENERAL FUND - 001								
001	100058	09/04/25	SOLITUDE LAKE MANAGEMENT LLC	PSI187694	7/23/25 SOLitude - Lake 6 aeration repair	Misc-Contingency	549900-53901	$1,673.25
001	100059	09/04/25	INFRAMARK LLC	154324	7/16/25 Inframark - Mailed Notice to Owners for FY2026 budget	Postage and Freight	541006-51301	$1,007.07
001	100059	09/04/25	INFRAMARK LLC	154847	7/24/25 Inframark - July 2025	Printing and Binding	547001-51301	$216.50
001	100060	09/08/25	INFRAMARK LLC	155270	8/1/25 Inframark - August 2025	ProfServ-Mgmt Consulting	531027-51201	$2,185.08
001	100060	09/08/25	INFRAMARK LLC	155270	8/1/25 Inframark - August 2025	ProfServ-Web Site Maintenance	531094-51301	$63.17
001	100061	09/25/25	INFRAMARK LLC	158127	9/5/25 Inframark - September 2025	ProfServ-Web Site Maintenance	531094-51301	$63.17
001	100061	09/25/25	INFRAMARK LLC	158127	9/5/25 Inframark - September 2025	ProfServ-Mgmt Consulting	531027-51201	$2,185.08
001	100062	09/25/25	COLEMAN, YOVANOVICH & KOESTER, P.A.	130	9/12/25 - CYK - services through 9/12/25	ProfServ-Legal Services	531023-51301	$529.00
001	100062	09/25/25	COLEMAN, YOVANOVICH & KOESTER, P.A.	129	8/25/25 CYK - Services through 8/25/25	ProfServ-Legal Services	531023-51401	$39.50
001	300079	09/09/25	FPL-ACH	082925-ACH	7/30-8/29/25	SVC PRD 07/30-8/29/25	543051-53901	$610.74
001	300080	09/19/25	FPL-ACH	82925-75177	7/30-8/29/25	SVC PRD 7/30-8/29/25	543051-53901	$163.81
							Fund Total	**$8,736.37**
							Total Checks Paid	**$8,736.37**

7C

RESOLUTION 2026-01

A RESOLUTION AMENDING NAPLES HERITAGE COMMUNITY DEVELOPMENT DISTRICT GENERAL FUND BUDGET FOR FISCAL YEAR 2025

WHEREAS, the Board of Supervisors, hereinafter referred to as the "Board", of Naples Heritage Community Development District, hereinafter referred to as "District", adopted a General Fund Budget for Fiscal Year 2025, and

WHEREAS, the Board desires to reallocate funds budgeted to reappropriate Revenues and Expenses approved during the Fiscal Year.

NOW THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF NAPLES HERITAGE COMMMUNITY DEVELOPMENT DISTRICT THE FOLLOWING:

1. The General Fund Budget is hereby amended in accordance with Exhibit "A" attached.

2. This resolution shall become effective this 4th day of November 2025 and be reflected in the monthly and Fiscal Year End 9/30/2025 Financial Statements and Audit Report of the District.

Naples Heritage
Community Development District

By: _____
Chairman

Attest:

By:_____
Secretary

Proposed Budget Amendment
For the Period Ending September 30, 2025

EXHIBIT A

ACCOUNT DESCRIPTION	CURRENT BUDGET	PROPOSED AMENDMENT	FINAL BUDGET	YEAR TO DATE ACTUAL	VARIANCE ($) FAV(UNFAV)
REVENUES					
Interest - Investments	$ 240	$ -	$ 240	$ 7,703	$ 7,463
Interest - Tax Collector	-	-	-	278	278
Special Assmnts- Tax Collector	199,750	-	199,750	199,750	-
Special Assmnts- Discounts	(7,990)	-	(7,990)	(7,256)	734
TOTAL REVENUES	**192,000**	**-**	**192,000**	**200,475**	**8,475**
EXPENDITURES					
Administration					
P/R-Board of Supervisors	5,000	-	5,000	3,800	1,200
FICA Taxes	383	-	383	291	92
ProfServ-Engineering	2,000	-	2,000	-	2,000
ProfServ-Field Management	950	-	950	-	950
ProfServ-Legal Services	3,500	-	3,500	6,997	(3,497)
ProfServ-Mgmt Consulting	26,221	-	26,221	26,221	-
ProfServ-Property Appraiser	2,996	-	2,996	994	2,002
ProfServ-Web Site Maintenance	758	-	758	758	-
Auditing Services	3,200	-	3,200	3,200	-
Postage and Freight	750	-	750	1,438	(688)
Insurance - General Liability	9,688	-	9,688	9,557	131
Printing and Binding	720	-	720	217	503
Legal Advertising	2,400	-	2,400	3,424	(1,024)
Misc-Assessment Collection Cost	3,995	-	3,995	3,852	143
Misc-Contingency	1,353	-	1,353	220	1,133
Misc-Web Hosting	1,823	-	1,823	1,164	659
Office Expense	250	-	250	300	(50)
Annual District Filing Fee	175	-	175	175	-
Total Administration	66,162	-	66,162	62,608	3,554
Field					
Contracts-Fountain	737	-	737	737	-
Contracts-Aerator Maintenance	3,550	-	3,550	2,248	1,302
Electricity - Aerator	10,000	-	10,000	7,819	2,181
R&M-Fence	480	7,900	8,380	8,305	75
R&M-Lake	55,000	-	55,000	34,100	20,900
Misc-Contingency	16,886	21,000	37,886	37,486	400
Capital Outlay	11,645	-	11,645	11,645	-
Total Field	98,298	28,900	127,198	102,340	24,858
Reserves					
Reserve - Fountain	200	-	200	-	200
Reserve - Roads and Lakes	27,340	-	27,340	34,100	(6,760)

Proposed Budget Amendment
For the Period Ending September 30, 2025

EXHIBIT A

ACCOUNT DESCRIPTION	CURRENT BUDGET	PROPOSED AMENDMENT	FINAL BUDGET	YEAR TO DATE ACTUAL	VARIANCE ($) FAV(UNFAV)
Total Reserves	27,540	-	27,540	34,100	(6,560)
TOTAL EXPENDITURES & RESERVES	**192,000**	**28,900**	**220,900**	**199,048**	**21,852**
Excess (deficiency) of revenues Over (under) expenditures	-	(28,900)	(28,900)	1,427	30,327
Net change in fund balance	-	(28,900)	(28,900)	1,427	30,327
FUND BALANCE, BEGINNING (OCT 1, 2024)	**96,351**	**-**	**96,351**	**96,351**	**-**
FUND BALANCE, ENDING	**$ 96,351**	**$ (28,900)**	**$ 67,451**	**$ 97,778**	**$ 30,327**

7D.

Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

1001 Yamato Road ▪ Suite 301
Boca Raton, Florida 33431
(561) 994-9299 ▪ (800) 299-4728
Fax (561) 994-5823
www.graucpa.com

August 8, 2025

To Board of Supervisors
Naples Heritage Community Development District
2005 Pan Am Circle, Suite 300
Tampa, FL 33607

We are pleased to confirm our understanding of the services we are to provide Naples Heritage Community Development District, Collier County, Florida ("the District") for the fiscal years ended September 30, 2025. We will audit the financial statements of the governmental activities and each major fund, including the related notes to the financial statements, which collectively comprise the basic financial statements of Naples Heritage Community Development District as of and for the fiscal year ended September 30, 2025. In addition, we will examine the District's compliance with the requirements of Section 218.415 Florida Statutes. This letter serves to renew our agreement and establish the terms and fee for the 2025 audit.

Accounting principles generally accepted in the United States of America provide for certain required supplementary information (RSI), such as management's discussion and analysis (MD&A), to supplement the District's basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to the District's RSI in accordance with auditing standards generally accepted in the United States of America. These limited procedures will consist of inquiries of management regarding the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We will not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

The following RSI is required by generally accepted accounting principles and will be subjected to certain limited procedures, but will not be audited:

1) Management's Discussion and Analysis

2) Budgetary comparison schedule

The following other information accompanying the financial statements will not be subjected to the auditing procedures applied in our audit of the financial statements, and our auditor's report will not provide an opinion or any assurance on that information:

1) Compliance with FL Statute 218.39 (3) (c)

Audit Objectives

The objective of our audit is the expression of opinions as to whether your financial statements are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles and to report on the fairness of the supplementary information referred to in the second paragraph when considered in relation to the financial statements as a whole. Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and will include tests of the accounting records of the District and other procedures we consider necessary to enable us to express such opinions. We will issue a written report upon completion of our audit of the District's financial statements. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion or add emphasis-of-matter or other-matter paragraphs. If our opinion on the financial statements is other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed an opinion, we may decline to express an opinion or issue a report, or may withdraw from this engagement.

We will also provide a report (that does not include an opinion) on internal control related to the financial statements and compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements as required by *Government Auditing Standards*. The report on internal control and on compliance and other matters will include a paragraph that states (1) that the purpose of the report is solely to describe the scope of testing of internal control and compliance, and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control on compliance, and (2) that the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's internal control and compliance. The paragraph will also state that the report is not suitable for any other purpose. If during our audit we become aware that the District is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit in accordance with U.S. generally accepted auditing standards and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

Examination Objective

The objective of our examination is the expression of an opinion as to whether the District is in compliance with Florida Statute 218.415 in accordance with Rule 10.556(10) of the Auditor General of the State of Florida. Our examination will be conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants and will include tests of your records and other procedures we consider necessary to enable us to express such an opinion. We will issue a written report upon completion of our examination of the District's compliance. The report will include a statement that the report is intended solely for the information and use of management, those charged with governance, and the Florida Auditor General, and is not intended to be and should not be used by anyone other than these specified parties. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion or add emphasis-of-matter or other-matter paragraphs. If our opinion on the District's compliance is other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the examination or are unable to form or have not formed an opinion, we may decline to express an opinion or issue a report, or may withdraw from this engagement.

Other Services

We will assist in preparing the financial statements and related notes of the District in conformity with U.S. generally accepted accounting principles based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. The other services are limited to the financial statement services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

Management Responsibilities

Management is responsible for compliance with Florida Statute 218.415 and will provide us with the information required for the examination. The accuracy and completeness of such information is also management's responsibility. You agree to assume all management responsibilities relating to the financial statements and related notes and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter our assistance with preparation of the financial statements and related notes and that you have reviewed and approved the financial statements and related notes prior to their issuance and have accepted responsibility for them. In addition, you will be required to make certain representations regarding compliance with Florida Statute 218.415 in the management representation letter. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, who possesses suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

Management is responsible for designing, implementing and maintaining effective internal controls, including evaluating and monitoring ongoing activities, to help ensure that appropriate goals and objectives are met; following laws and regulations; and ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles, for the preparation and fair presentation of the financial statements and all accompanying information in conformity with U.S. generally accepted accounting principles, and for compliance with applicable laws and regulations and the provisions of contracts and grant agreements.

Management is also responsible for making all financial records and related information available to us and for the accuracy and completeness of that information. You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, (2) additional information that we may request for the purpose of the audit, and (3) unrestricted access to persons within the government from whom we determine it necessary to obtain audit evidence.

Your responsibilities include adjusting the financial statements to correct material misstatements and for confirming to us in the written representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the government complies with applicable laws, regulations, contracts, agreements, and grants and for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts or grant agreements, or abuse that we report.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits or other studies related to the objectives discussed in the Audit Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions, for the report, and for the timing and format for providing that information.

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in these sites or to consider the consistency of other information in the electronic site with the original document.

Audit Procedures—General

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. We will plan and perform the audit to obtain reasonable rather than absolute assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the government or to acts by management or employees acting on behalf of the government. Because the determination of abuse is subjective, *Government Auditing Standards* do not expect auditors to provide reasonable assurance of detecting abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us, even though the audit is properly planned and performed in accordance with U.S. generally accepted auditing standards and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. Our responsibility as auditors is limited to the period covered by our audit and does not extend to later periods for which we are not engaged as auditors.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, and may include tests of the physical existence of inventories, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will request written representations from your attorneys as part of the engagement, and they may bill you for responding to this inquiry. At the conclusion of our audit, we will require certain written representations from you about your responsibilities for the financial statements; compliance with laws, regulations, contracts, and grant agreements; and other responsibilities required by generally accepted auditing standards.

Audit Procedures—Internal Control

Our audit will include obtaining an understanding of the government and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards and *Government Auditing Standards.*

Audit Procedures—Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the District's compliance with the provisions of applicable laws, regulations, contracts, agreements, and grants. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

Engagement Administration, Fees, and Other

We understand that your employees will prepare all confirmations we request and will locate any documents selected by us for testing.

The audit documentation for this engagement is the property of Grau & Associates and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to a cognizant or oversight agency or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Grau & Associates personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies. Notwithstanding the foregoing, the parties acknowledge that various documents reviewed or produced during the conduct of the audit may be public records under Florida law. The District agrees to notify Grau & Associates of any public record request it receives that involves audit documentation.

Our fee for these services will not exceed $3,300 for the September 30, 2025 audit, unless there is a change in activity by the District which results in additional audit work or if additional Bonds are issued.

Grau & Associates and its subcontractors warrant compliance with all federal immigration laws and regulations that relate to their employees. Grau agrees and acknowledges that the District is a public employer subject to the E-Verify requirements as set forth in Section 448.095, Florida Statutes, and that the provisions of Section 448.095, Florida Statutes apply to this Agreement. If the

District has a good faith belief that the Grau has knowingly hired, recruited or referred an alien who is not authorized to work by the immigration laws or the Attorney General of the United States for employment under this Agreement, the District shall terminate this Agreement. If the District has a good faith belief that a subcontractor performing work under this Agreement knowingly hired, recruited or referred an alien who is not duly authorized to work by the immigration laws or the Attorney General of the United States for employment under this Agreement, the District shall promptly notify Grau and order Grau to immediately terminate the contract with the subcontractor. Grau shall be liable for any additional costs incurred by the District as a result of the termination of a contract based on Grau's failure to comply with E-Verify requirements evidenced herein.

We will complete the audit within prescribed statutory deadlines, with the understanding that your employees will provide information needed to perform the audit on a timely basis. We acknowledge that the District must submit its annual Audit to the Auditor General no later than nine (9) months after the end of the audited fiscal year.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date. If we are aware that a federal awarding agency or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. Invoices will be submitted in sufficient detail to demonstrate compliance with the terms of this agreement. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate.

This agreement may be renewed each year thereafter subject to the mutual agreement by both parties to all terms and fees. The fee for each annual renewal will be agreed upon separately.

The District has the option to terminate this agreement with or without cause by providing thirty (30) days written notice of termination to Grau & Associates. Upon any termination of this agreement, Grau & Associates shall be entitled to payment of all work and/or services rendered up until the effective termination of this agreement, subject to whatever claims or off-sets the District may have against Grau & Associates.

We will provide you with a copy of our most recent external peer review report and any letter of comment, and any subsequent peer review reports and letters of comment received during the period of the contract. Our 2022 peer review report accompanies this letter.

We appreciate the opportunity to be of service to Naples Heritage Community Development District and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,

Grau & Associates



Antonio J. Grau

RESPONSE:

This letter correctly sets forth the understanding of Naples Heritage Community Development District.

By: _____

Title: _____

Date: _____

FICPA Peer Review Program
Administered in Florida
by The Florida Institute of CPAs

AICPA Peer Review Program
Administered in Florida
by the Florida Institute of CPAs

March 17, 2023

Antonio Grau
Grau & Associates
951 Yamato Rd Ste 280
Boca Raton, FL 33431-1809

Dear Antonio Grau:

It is my pleasure to notify you that on March 16, 2023, the Florida Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is December 31, 2025. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,

FICPA Peer Review Committee

Peer Review Team
FICPA Peer Review Committee

850.224.2727, x5957

cc: Daniel Hevia, Racquel McIntosh

Firm Number: 900004390114 Review Number: 594791

7E.

Brown & Brown

PUBLIC SECTOR

Insurance Proposal

October 1, 2025 to October 1, 2026

NAPLES HERITAGE COMMUNITY DEVELOPMENT DISTRICT



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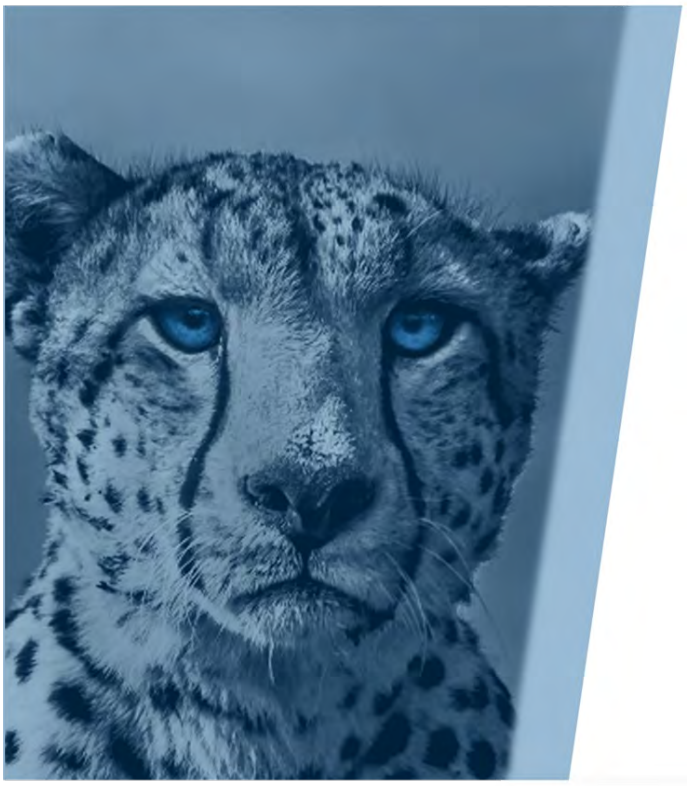
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Our Story

The Brown & Brown, Public Sector team is a highly-specialized unit of insurance advisors 100% trained to deliver industry-leading services to public entities in the State of Florida. Since 1992, we have continuously refined that specialization and enhanced our services, while becoming the largest public entity brokerage in Florida. Our team provides Property & Casualty and Employee Benefits services to governments from Key West to the Panhandle and represents more than 200 clients.



We have built our reputation by empowering our governmental clients to outperform their industry peers, lower their cost of risk, and enhance their insurance programs - all while staying within their annual budgetary constraints. Our team is committed to serve those who serve the public – and provide superior service to our clients, their staff, and their employees.

- Dedicated service team working exclusively for Florida local governments in all capacities surrounding risk and human resources
- Access to highly experienced public entity resources including Claims Team, Panel Counsel, Loss Control, Disaster Planning and Recovery, and Risk Management Specialists.
- Only retail office in Florida 100% committed to Florida's public entities
- Brown & Brown, Public Sector currently represents over 200 of Florida's governmental entities
    - 22 Counties
    - 70 Cities
    - 20 Public Airports
    - 7 Public School Districts
    - State of Florida

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

An Introduction to Your Service Team

Account Executives

Matt Montgomery Executive Vice President	(386) 239-7245	Matt.Montgomery@bbrown.com
Tiffany Hill, GBDS Vice President / Client Services Leader	(386) 281-6846	Tiffany.Hill@bbrown.com
Paul Dawson, ARM-P Senior Vice President / Public Risk Advisor	(386) 239-4045	Paul.Dawson@bbrown.com
Michelle Martin, CIC Senior Vice President / Public Risk Advisor	(386) 239-4047	Michelle.Martin@bbrown.com
Michelle Perry Vice President / Business Development	(386) 366-6378	Michelle.Perry@bbrown.com
Kyle Stoekel, ARM-P, CIC, CRM Public Risk Advisor	(386) 944-5805	Kyle.Stoekel@bbrown.com
Bill Wilson Public Risk Advisor	(386) 333-6058	Bill.Wilson@bbrown.com
Molly Grande, CPCU, ARM, AIDA Public Risk Advisor	(386) 333-6084	Molly.Grande@bbrown.com
Devyn Donley Account Executive	(386) 239-4070	Devyn.Donley@bbrown.com
Robin Russell, ARM-P, CISR, CSRM Vice President / Account Executive	(386) 239-4044	Robin.Russell@bbrown.com
Victoria "Tori" Reedy Executive Coordinator	(386) 239-4043	Tori.Reedy@bbrown.com

Service Representatives

Emily Bailey Public Risk Specialist	(386) 333-6085	Emily.Bailey@bbrown.com
Melody Blake, ACSR Senior Public Risk Specialist	(386) 239-4050	Melody.Blake@bbrown.com
Taylor Brodeur Public Risk Specialist	(386) 361-5225	Taylor.Brodeur@bbrown.com
Jessica Conway Public Risk & Claims Specialist	(386) 333-6001	Jessica.Conway@bbrown.com
Megan Feinberg Public Risk Specialist Assistant	(386) 281-6836	Megan.Feinberg@bbrown.com
Patricia "Trish" Jenkins, CPSR Senior Public Risk Specialist	(386) 239-4042	Trish.Jenkins@bbrown.com
Mallory Moretti Public Risk & Claims Specialist	(386) 800-1164	Mallory.Moretti@bbrown.com

Certificate Requests: 179.certificates@bbrown.com
Claim Reporting: 179.claims@bbrown.com

Our Service Team philosophy focuses on accountability at all levels of account management. Our goal is not simply to meet your service needs, but to exceed them. All the employees at Brown & Brown are dedicated to achieving this goal and distinguishing ourselves from the competition.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Preferred Governmental Insurance Trust (*Preferred*) Overview

Several hundred members and millions in premiums prove that the *Preferred* Governmental Insurance Trust® fulfills what Florida needs: an insurance program exclusively customized and dedicated to the public sector. *Preferred* stays on the forefront of specialized insurance for property, casualty and workers' compensation because it is non-profit and self-governed with a membership comprised solely of Florida public entities.

Preferred's history dates back to 1999. Its robust membership and financial strength, including consistent growth of surplus, stem from its conservative platform of managed risk. *Preferred* is just that: ***preferred*** for unmatched public entity experience, innovation, stability and personalized service.

***Preferred*'s Member Types**		
Municipalities	Counties	Special Districts
Public Schools	Charter Schools	Sheriff Departments
Housing Authorities	Aviation Authorities	Transit, Port & Utility Authorities

***Preferred*'s Comprehensive Coverages**		
Property	Workers' Compensation	General Liability
Automobile Liability	Automobile Physical Damage	Law Enforcement Liability
Public Officials Liability	Employment Practices Liability	Educators' Legal Liability

The Power of Groups and People

What does a specialized insurance trust do for you? In the case of *Preferred*, it gives you the purchasing power of a very large trust with billions of covered property values—far more financial negotiating power than a single public entity can muster. As a *Preferred* member, you are part of a formidable Florida insurance trust.

The trust also transfers risks from any one public entity to the larger group. This provides all members of the trust better rating structures with less volatility. *Preferred*'s sole focus on government ensures that members' unique needs are met.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Underwriting and Administration

Behind *Preferred*'s underwriting platform are decades of success built on integrity and market relationships. Our team of underwriters' vast insurance expertise enhances the actuarial and scientific data used to underwrite individual risks within the trust. Services delivered are both broad and precise. Reliability is assured. The administrator for *Preferred* is Public Risk Underwriters of Florida, Inc.® (PRU), Florida's premier public entity specialist of its kind. Preferred's claims administrator is PGCS Claim Services. With more than 25 years in claims experience, PGCS is Florida's foremost governmental third-party administration company.

Public Risk Underwriters of Florida
Insurance Solutions for Public Entities

Preferred® PGIT GOVERNMENTAL INSURANCE TRUST

PGCS℠ Claim Services

Underwriting Highlights

- **Diverse risk financing options:** guaranteed cost, deductible, self-insured retention, all lines aggregate
- **Competitive premium discounts** based on favorable experience and sound safety practices
- **Flexibility of coverage design**, including mono-line or package basis
- **Dynamic financial analysis** conducted periodically to validate the trust's superior financial standing

Administration

- **General counsel, defense counsel and litigation services** by specialists in governmental law
- **Membership relations** for networking and professional development
- **Legislative Pulse newsletter** from Tallahassee-based law firm
- **Professional marketing** that guarantees local agent support, governmental knowledge and an ever-growing group of members
- **Preferred News**—a quarterly publication covering the spectrum of government insurance issues
- **State filing, accounting and independent CPA audited financials** as needed

Preferred's Expert Boards Know Your Business

Preferred is governed and guided by people working daily in all segments of Florida's public sector – from municipalities to counties to schools to special taxing districts.

The Board of Trustees is comprised of elected public officials who work wisely and diligently to set policy, keeping Preferred as the premier public entity insurer of its kind.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Preferred Claims Administration

Preferred Governmental Claim Solutions, Inc. ® (PGCS) is the premier governmental third-party claims administrator in the state of Florida and administers the claims for Preferred Governmental Insurance Trust (*Preferred*). Since its founding in 1956, PGCS has provided claims administration services exclusively to over 450 governmental entities including schools, cities, towns, counties, community development districts, and fire districts. Therefore, PGCS's adjusters are extremely qualified to handle governmental tort liability and public sector workers' compensation claims. They are experts at investigating and handling police and firefighters presumption claims. PGCS is sensitive to the politics involved in the handling of public entity claims.

PGCS's claims administration program consists of workers' compensation, general liability, bodily injury, personal injury, property, auto liability, auto physical damage, employment practices liability, school leaders/educators liability and public officials liability. Their claims staff has over 630 years of combined insurance experience and each has been with PGCS an average of 8 years. Claims are handled under strict supervision in accordance with the PGCS workers' compensation and liability claim handling procedure manuals and the PGCS claim best practices manual. A random sampling of each adjuster's claim files are audited on a monthly basis by a Quality Assurance Manager to ensure compliance.

PGCS provides their clients with a dedicated Subrogation Unit to pursue reimbursements from at-fault third parties. Their current recovery rate is fifty-nine (59) percent of the claim costs expended. PGCS also has a dedicated excess reporting and recovery unit for communication to and securing reimbursement from the excess and/or reinsurance carriers. In addition, PGCS provides a state-approved Special Investigation Unit (SIU) to prevent and pursue fraudulent claims. PGCS offers rewards up to $10,000.00 for the arrest and conviction of persons committing workers' compensation fraud. This service is provided via a twenty-four hour seven day a week hotline.

PGCS utilizes the RiskMaster system for claims processing. This system captures a wide variety of data and allows the adjuster to enter an unlimited number of claim notes, process reserve changes, and issue claim payments. Customized reports can be obtained from PGCS's on-line system containing a multitude of data parameters that a client may choose to analyze. The system can be accessed by clients via their website at www.pgcs-tpa.com.

Communication with PGCS's clients is the cornerstone of their claims administration program. Professional adjusters, nurses, management, quarterly in-depth claim review meetings, 24/7 claim reporting, utilization of attorneys specializing in public entity defense, litigation management, and return to work programs are just a sample of how PGCS has set the standard for the industry.

PGCS is committed to partnering with their clients to provide professional and aggressive claim management programs. While they are recognized as the leader in the industry, PGCS is always striving to improve the quality of their programs and expand the services that they offer.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Preferred Safety and Risk Management Services

The success of any public sector community is tied to its ability to protect and preserve its human physical assets. This basic premise serves as the cornerstone of an effective Safety Management program and underscores the importance of Safety and Risk Control to the community. *Preferred*'s Safety and Risk Management Department is very aware of the valuable contribution a comprehensive safety and risk control program makes to the bottom-line of any organization.

At *Preferred*, Safety consultations originate with one basic thought—to recommend specific measures to minimize or eliminate the exposures that cause accidents. This does not mean that the workplace become no-risk utopias, but we expect our consultants to recommend measures to control and minimize all types of accidents, injuries and illnesses to our *Preferred* members' operations and premises.

Preferred is dedicated to meeting the challenge of the complex issues facing public sector organizations Disarming these issues and converting them into solutions which work to the advantage of our goal. *Preferred*'s approach to risk control incorporates the following elements:

- **Exposure Identification** – Assist management in determining areas where a chance of loss might exist through cause trend analysis, work site evaluations, and facility inspections.

- **Exposure Measurement and Loss Analysis** – Loss analysis and a review of the consequences of the exposures will be considered to develop alternative methods of control.

- **Determination and Selection of Appropriate Risk Control Methods** – Based on measurement and analysis, specific recommendations and/or custom designed risk control plan will be formulated. OSHA, as well as other Agency Standards will be applied and/or used as a "Best Practice" measure when designing and formulating safety and risk control plans.

- **Training and Safety Management Consulting** – After considering client needs specific services and/or training will be formulated and initiated to fit the client's need. Key Personnel or specialty consulting services with the knowledge and skills needed to meet those identified needs will be provided.

- **Additional Consulting Services Available** – Preferred's Safety & Risk Management has other services available that may benefit our clients. These services include security evaluations and review of existing safety and risk programs.

Preferred's Safety and Risk Management Department evaluates the unique needs to each client, ultimately designing a program that is capable of being integrated into the overall safety and risk control efforts of each client. *Preferred*'s dedication to the problem-solving approach is the foundation of their Safety and Risk Management Service.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

General Liability

Term: October 1, 2025 to October 1, 2026

Company: Preferred Governmental Insurance Trust (*Preferred*)

Form: Occurrence

Coverage	Limit	Deductible
General Liability		
Bodily Injury and Property Damage, per Occurrence	$1,000,000	$0 Per Occurrence
Personal Injury and Advertising Injury, per Person/Occurrence	Included	
Products/Completed Operations, Aggregate	Included	
Fire Damage, per Occurrence	Included	
Medical Payments	$2,500	
Employee Benefits Liability, per Occurrence	$1,000,000	
Sublimits		
Vicarious Law Enforcement Liability, per Occurrence	$1,000,000	Same as General Liability
Principle of Eminent Domain Including Inverse Condemnation, "Bert J. Harris, Jr., Private Property Rights Protection Act" per Occurrence / Annual Aggregate.	$100,000	
Sewer Backup and Water Damage: Non-Negligent Claims Negligent Claims.	 $10,000/$200,000 $200,000/$200,000	
Herbicide and Pesticide, per Occurrence	$1,000,000	

Additional Coverages Included:

1. EMT/Paramedic Professional Services
2. Premises Operations
3. "Insured" Contracts
4. Host Liquor Liability
5. Broad Form Property Damage Subject to $2,500 Personal Property of Others Sublimit
6. Watercraft Liability (under 52 feet). See policy form for limitations
7. Limited Worldwide Coverage
8. Failure to Supply Water
9. Communicable Disease (Correctional Facilities and Health Care Facilities - $300,000 Limit)

Notes of Importance:

1. Premium is not audited.
2. Defense Costs are paid in addition to policy limits.
3. In the event an occurrence, accident or offense continues beyond the policy period, the applicable deductible would apply separately to each policy period in which the occurrence, accident or offense was committed or was alleged to have been committed.
4. Limits of Liability are subject to Florida Statute 768.28.
5. Deductible does not apply to claims expense.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

General Liability

Exclusions, include but not limited to:

- Expected or intended injury
- Contractual Liability
- Liquor Liability
- Workers' Compensation and similar laws
- Employer's Liability
- Pollution
- Aircraft, Auto or Watercraft
- Mobile Equipment
- War
- Damage to Your Property, Product or Work
- Damage to Impaired Property or Property Not Physically Injured
- Recall of Products, Work or Impaired Property
- Racketeering
- Law Enforcement, except for vicarious liability arising out of an act or omission by a law enforcement agency that is not owned, operated or controlled by the "Covered party" if there is a contract with an outside agency to provide law enforcement for your entity.
- Asbestos, Mold, Fungi, or Bacteria
- Liability arising out of or caused or contributed to by any ownership, maintenance, operation, use, loading, unloading or control of or responsibility for any airfield, airport, aircraft, runway, hangar, building or other property or facility designed for, used, connected, associated or affiliated with or in any way related to aviation or aviation activities; this exclusion does not apply to premises exposure for those common areas open to the public including but not limited to parking areas, sidewalks, and terminal buildings.
- Failure or inability to supply or any interruption of any adequate quantity of power, steam, pressure, or fuel
- Subsidence, erosion or earth movement.
- Hospital / Clinic Medical Malpractice or Health Care Facilities
- Professional Health Care Services, but not including emergency medical services for first aid performed by emergency medical technicians, paramedics or Medical Director while in the course and scope of their duties.
- ERISA
- Actual or alleged illegal discrimination
- Injunctive, declaratory or equitable relief
- Actual or alleged deterioration, bursting breaking, leaking, inadequacy, design of, control of, maintenance of, or any other alleged responsibility for any structure device, or water course, natural or man-made, including, but not limited to: dams, reservoirs, levees, banks, embankments, gates, canals, ditches, gutters, sewers, aqueducts, channels, culvert, retaining walls, drains, tanks, watershed, or drains, a purpose of which is the containing, carrying, impeding, channeling, diverting, or draining of water or other liquid. Does not apply only as to the bursting or failure of man-made sewer, storm water, grey water or potable water supply pipes owned and maintained by Covered Party.
- Sexual abuse after initial discovery
- Perflouroalkyl and Polyflouroalkyl group of manufactured chemicals including, but not limited to the PFAS sub-groups: perfluorooctane sulfonate (PFOS), perfluorooctanoic acid (PFOA), and Perfluorohexane sulfonate acids (PFHxS).

Public Officials Liability/Employment Practices Liability

Term: October 1, 2025 to October 1, 2026

Company: Preferred Governmental Insurance Trust (*Preferred*)

Form: **POL/EPLI:** Claims Made

Coverage	Limit	Deductible
Public Officials Liability Retroactive Date: Full Prior Acts		
Per Claim	$1,000,000	$0 Per Claim
Employment Practices Liability Retroactive Date: Full Prior Acts		
Per Claim	$1,000,000	$0 Per Claim
Sublimits		
Employee Pre-Termination Legal Consultation Services Per Employee Aggregate	 $2,500 $5,000	
Non-Monetary Claims Defense Costs, Aggregate	$100,000	

Notes of Importance:

1. Defense Costs are paid in addition to policy limits.
2. Deductible does not apply to claims expense.
3. Broadened definition of “Who is an Insured.”
4. Limits of Liability are subject to Florida Statute 768.28.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Public Officials Liability/Employment Practices Liability

Exclusions, include but not limited to:

- Criminal Acts
- Non-Monetary relief except as provided in the Supplementary Payments
- Bodily Injury, Personal Injury, Property Damage, Advertising Injury
- Damages arising out of Inverse Condemnation, Eminent Domain, Temporary or Permanent taking, Adverse Possession, Dedication by adverse Use, Condemnation Proceedings, or claims brought under Florida Statute 70.001 the "Bert J. Harris Jr., Private Property Rights Protection Act" or any similar claim by whatever named called.
- War, Invasion, Acts of foreign enemies, hostiles or warlike operations, strike, lock-out, riot, civil war, rebellion, revolution, insurrection or civil commotion
- Failure to effect and maintain insurance
- Fiduciary Liability
- Pollution
- Workers' Compensation, Employers Liability and similar laws
- Nuclear
- ERISA of 1974, any similar state or local laws, and any rules and regulations promulgated thereunder and amendments thereto.
- Infringement of copyright, trademark, plagiarism, piracy or misappropriation of any ideas or other intellectual property
- Contractual Liability
- Health Care Professional or Health Care Facilities
- Prior and Pending claims
- Workers' Adjustment and Retraining Notification Act, OSHA, RICO, or ADA
- Law Enforcement Activities
- Insured vs. Insured
- Bonds, Taxes or Construction contracts
- Collective Bargaining Agreements
- Capital Improvement to make property more accessible or accommodating to disabled persons
- Punitive Damages
- Return or improper assessment of taxes, assessments, penalties, fines, fees
- Activities of any attorney-at-law, medical personnel, architect, engineer or accountant, in the scope of their professional duties, except for claims made against them as Public Officials or Employees
- Media Wrongful Act
- Access or Disclosure of Confidential or Personal Information and Data-related Liability
- Perflouroalkyl and Polyflouroalkyl group of manufactured chemicals including, but not limited to the PFAS sub-groups: perfluorooctane sulfonate (PFOS), perfluorooctanoic acid (PFOA), and Perfluorohexane sulfonate acids (PFHxS).

Public Officials Liability/Employment Practices Liability

Claims Made Policy:

When a policy is on a claims-made basis, coverage triggers based on the actual filing date or receipt of the claim, in addition to the date of loss or injury. It handles any insured loss or claim filed during the policy period, regardless of when the actual loss or injury occurred, subject to the retroactive date on the declarations. Claims-made coverage applies only to covered losses that occur after the retroactive date.

Extended Reporting Periods:

Preferred provides the following Extended Reporting Periods options in the event coverage is cancelled or non-renewed:

Automatic Extended Reporting Period – continued coverage granted for a period of 60 days following the effective date of termination or nonrenewal, but only for Claims first made during the 60 days and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

Optional Extended Reporting Period – The Public Entity shall have the right, upon payment of up to 200% of the expiring premium, to purchase an Optional Extended Reporting Period, for the period of 12 months following the effective date of the cancellation or nonrenewal, but only for Claims first made during the Optional Extended Reporting Period and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

Cyber Liability

Term: October 1, 2025 to October 1, 2026

Company: Preferred Governmental Insurance Trust (*Preferred*)

Form: Claims Made – Duty to Defend

Cyber Liability Retroactive Date: 10/1/2018		
Coverage	**Limit**	**Deductible**
Policy Limit – Annual Aggregate	**$2,000,000**	**Per Below**
Third Party Liability Coverage		
Privacy & Security Liability, each claim	$2,000,000	$25,000
Media Content Services Liability, each claim	$2,000,000	$25,000
PCI DSS, sublimit	$1,000,000	$25,000
First Party Liability Coverage		
Cyber Extortion & Ransomware, each claim	$500,000	$25,000
Data Breach & Crisis Management, each claim	$2,000,000	$25,000
Data Recovery, each claim	$2,000,000	$25,000
Business Interruption / Extra Expense, each claim	$2,000,000	$25,000/12 Hr.
Cyber Crime, refer to form for sublimits – Annual Aggregate Social Engineering Financial Fraud* Funds Transfer Fraud Invoice Manipulation	**$350,000** $350,000 $350,000 $350,000	$25,000 $25,000 $25,000 $25,000
Utility Fraud, refer to form for sublimits – Annual Aggregate Crypto Jacking Telecommunications Fraud	**$350,000** $350,000 $350,000	$25,000 $25,000 $25,000
System Failure – BI/EE, sublimit	$2,000,000	$25,000/12 Hr.
Dependent Business Interruption – System Failure, BI/EE, sublimit	$2,000,000	$25,000/12 Hr..
Bricking Coverage, sublimit	$1,000,000	$25,000
Consequential Reputation Loss Period of Restoration	$500,000 6 Months	12 Hours

*Social Engineering Financial Fraud – Coverage shall only apply if you verify the instruction to transfer money or securities by following a pre-arranged callback or other established procedural method to authenticate the validity or the request prior to acting upon any transfer instructions.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Cyber Liability

Notes of Importance:

1. Defense Costs are included in the policy limits.
2. Deductible does apply to claims expense.

Exclusions, include but not limited to:

- Deliberate Acts / Personal Profit
- Prior Acts
- Bodily Injury / Property Damage
- Employment Practices
- Ownership
- Covered Party vs. Covered Party
- ERISA/Securities
- Pollution
- Contractual except when assumed under contract
- Guarantees
- Advertising
- Business Practice
- Patent
- Privacy
- Governmental Action
- Software Responsibility
- Act of God
- Recover of Profits, Royalties and Fees
- RICO
- Trade Secrets
- War
- Infrastructure Failure electrical, mechanical, Internet, telecommunication, cable or satellite failure, fluctuation or outage not under the operational control of the Insured, however caused, including any electrical power interruption, short circuit, surge, brownout or blackout, however this exclusion shall not apply to a telecommunications fraud event.
- Governmental Orders any court order or damaged requiring the Covered Party to provide law enforcement, any administrative, regulatory or judicial body or any other governmental authority access to personally identifiable information, protected health information, or confidential business information.
- Over-Redemption price discounts, prizes, awards, coupons, or any other valuable consideration given in excess of the contracted or expected amount.
- Perflouroalkyl and Polyflouroalkyl group of manufactured chemicals including, but not limited to the PFAS sub-groups: perfluorooctane sulfonate (PFOS), perfluorooctanoic acid (PFOA), and Perfluorohexane sulfonate acids (PFHxS).

Cyber Liability

Claims Made Policy:

When a policy is on a claims-made basis, coverage triggers based on the actual filing date or receipt of the claim, in addition to the date of loss or injury. It handles any insured loss or claim filed during the policy period, regardless of when the actual loss or injury occurred, subject to the retroactive date on the declarations. Claims-made coverage applies only to covered losses that occur after the retroactive date.

Extended Reporting Periods:

Preferred provides the following Extended Reporting Periods options in the event coverage is cancelled or non-renewed:

Automatic Extended Reporting Period – continued coverage granted for a period of 60 days following the effective date of termination or nonrenewal, but only for Claims first made during the 60 days and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

Optional Extended Reporting Period – The Covered Party shall have the right to purchase an Optional Extended Reporting Period for up to 6 years following the effective date of the cancellation or nonrenewal, as shown below:

- Option 1 – 100% for 1 Year
- Option 2 – 150% for 2 Years
- Option 3 – 175% for 3 Years
- Option 4 – 250% for 6 Years

but only for Claims first made during the Optional Extended Reporting Period and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Naples Heritage Community Development District

Brown & Brown

Automobile Liability

Term: October 1, 2025 to October 1, 2026

Company: Preferred Governmental Insurance Trust (*Preferred*)

Coverage	Limit	Symbol	Deductible
Automobile Liability (Based on 0 Vehicles)			
Primary Bodily Injury and Property Damage Liability – Combined Limit	$1,000,000	8, 9	$0 Each Accident
Personal Injury Protection	Statutory	5	$0 Per Person
Medical Payments	N/A	N/A	N/A
Uninsured Motorist	Rejected	N/A	N/A

Coverage and Notes of Importance:

1. Defense Costs are paid in addition to policy limits.
2. Hired and non-owned liability is included.
3. Premium is based on number of vehicles and subject to adjustment if schedule is changed.
4. Limited Replacement Cost provided for owned and scheduled private passenger vehicle, light truck or sport utility vehicle that is involved in a covered total loss if the vehicle has less than 18,000 miles and is within the first 12 months of being scheduled at the time of the total loss. This coverage does not apply to police vehicles or any other vehicle types already listed.
5. Physical Damage coverage paid at Actual Cash Value or 110% of the value reported on the schedule, whichever is less**.** Please see policy for complete details.
6. Limits of Liability are subject to Florida Statute 768.28.

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Automobile Liability

Description of Covered Auto Designation Symbols:

SYMBOL		DESCRIPTION
1	=	ANY "AUTO"
2	=	ALL OWNED "AUTOS" ONLY. Only those "autos" you own and or lease (and for Liability Coverage any "trailers" you don't own while attached to power units you own). This also includes all those "autos" you acquire ownership of after the coverage agreement begins.
3	=	OWNED PRIVATE PASSENGER "AUTOS" ONLY. Only the private passenger "autos" you own. This includes those private passenger "autos" you acquire ownership of after the coverage agreement begins.
4	=	OWNED "AUTOS" OTHER THAN PRIVATE PASSENGER "AUTOS" ONLY. Only those "autos" you own that are not of the private passenger type (and for Liability Coverage any "trailers" you don't own while attached to power units you own). This includes those "autos" not of the private passenger type you acquire ownership of after the coverage agreement begins.
5	=	OWNED "AUTOS" SUBJECT TO NO-FAULT. Only those "autos" you own and or lease that are required to have No-Fault benefits in the state where they are licensed or principally garaged. This includes those "autos" you acquire ownership of after the coverage agreement begins provided they are required to have No-Fault benefits in the state where they are licensed or principally garaged.
6	=	OWNED "AUTOS" SUBJECT TO A COMPULSORY UNINSURED MOTORIST LAW. Only those "autos" you own and or lease that because of the law in the state where they are licensed or principally garaged are required to have and cannot reject Uninsured Motorists Coverage. This includes those "autos" you acquire ownership of after the coverage agreement begins provided they are subject to the same state uninsured motorists requirement.
7	=	SPECIFICALLY DESCRIBED "AUTOS". Only those "autos" described in ITEM THREE of the Declarations for which a premium charge is shown (and for Liability Coverage any "trailers" you don't own while attached to any power unit described in ITEM THREE).
8	=	HIRED "AUTOS" ONLY. Only those "autos" you hire rent or borrow. This does not include any "auto" you lease, hire, rent, or borrow from any of your employees or partners or members of their households.
9	=	NONOWNED "AUTOS" ONLY. Only those "autos" you do not own, hire, rent or borrow that are used in connection with your business. This includes "autos" owned by your employees or partners or members of their households but only while used in your business.

Naples Heritage Community Development District

Brown & Brown

Premium Recapitulation

	Annual Premium	Check Option Accept	Reject
***Preferred* Package**			
General Liability	$5,350.00	☒	☐
Public Officials / Employment Practices Liability	$2,427.00	☒	☐
Cyber Liability	$1,812.00	☒	☐
Automobile Liability	$600.00	☒	☐
Package Payment Plan:	Annual		

All lines of coverage must be accepted in order to bind coverage with *Preferred*.

I authorize Brown & Brown to request the underwriters to bind coverage on the items indicated above and acknowledge receipt of the Compensation and Financial Condition Disclosure(s) provided in this proposal.

_____
(Signature)

Justin Faircloth, District Manager/Secretary
_____
(Name & Title)

8/21/25
_____
(Date)

SIGN HERE

This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.

Notes of Importance:

1. Quotes provided in the proposal are valid until 10/1/2025. After this date terms and conditions are subject to change by the underwriters.

2. *Preferred* is not subject to the Florida Insurance Guaranty Act, in the event it becomes unable to meet its claims payment obligations. However, insured is named on excess of loss policies.

3. Some of the Carriers of the *Preferred* excess of loss policies are issued pursuant to the FL Surplus Lines laws. Entities insured by surplus lines carriers do not have the protection of the FL Insurance Guaranty Act to the extent of any right of recovery for the obligation of an insolvent, unlicensed insurer.

4. Quote is subject to review and acceptance by *Preferred* Board of Trustees.

5. Premiums are subject to change if all lines of coverage quoted are not bound. **Premiums are subject to 25% minimum premium upon binding.**

6. Not all coverages requested may be provided in this quotation.

7. Flood quotes from NFIP may be available. Please advise your agent if you have property located in zones A or V and would like to have separate NFIP quotes.

8. The Trust requires all Members to maintain valid and current certificates of workers' compensation insurance for all work performed by persons other than its employees.

9. **The total premium is due within 30 days of inception. Premium financing can be arranged if needed.**

10. Quote is not bound until written orders to bind are received from the insured and the Trust subsequently accepts the risk.

11. Should signed application reveal differing details/data than original application received, the entire quote/binder is subject to revision and possible retraction.

12. Higher limits of liability may be available. Please consult with your agent.

13. This proposal is based upon exposures to loss made known to the Brown & Brown. Any changes in exposures (i.e. new operations, new acquisitions of property or change in liability exposure) need to be promptly reported to us in order that proper coverage may be put into place.

14. **This proposal is intended to give a brief overview. Please refer to coverage agreements for complete information regarding definition of terms, deductibles, sub-limits, restrictions and exclusions that may apply. In the event of any differences, the policy will prevail.**

Retail Compensation Disclosure

In addition to the commissions or fees received by us for assistance with the placement, servicing, claims handling, or renewal of your insurance coverages, other parties, such as excess and surplus lines brokers, wholesale brokers, reinsurance intermediaries, underwriting managers and similar parties, some of which may be owned in whole or in part by Brown & Brown, Inc., may also receive compensation for their role in providing insurance products or services to you pursuant to their separate contracts with insurance or reinsurance carriers. That compensation is derived from your premium payments. Additionally, it is possible that we, or our corporate parents or affiliates, may receive contingent payments or allowances from insurers based on factors which are not client-specific, such as the performance and/or size of an overall book of business produced with an insurer. We generally do not know if such a contingent payment will be made by a particular insurer, or the amount of any such contingent payments, until the underwriting year is closed. That compensation is partially derived from your premium dollars, after being combined (or "pooled") with the premium dollars of other insureds that have purchased similar types of coverage. We may also receive invitations to programs sponsored and paid for by insurance carriers to inform brokers regarding their products and services, including possible participation in company-sponsored events such as trips, seminars, and advisory council meetings, based upon the total volume of business placed with the carrier you select. We may, on occasion, receive loans or credit from insurance companies. Additionally, in the ordinary course of our business, we may receive and retain interest on premiums you pay from the date we receive them until the date of premiums are remitted to the insurance company or intermediary. In the event that we assist with placement and other details of arranging for the financing of your insurance premium, we may also receive a fee from the premium finance company.

If an intermediary is utilized in the placement of coverage, the intermediary may or may not be owned in whole or part by Brown & Brown, Inc. or its subsidiaries. Brown & Brown entities operate independently and are not required to utilize other companies owned by Brown & Brown, Inc., but routinely do so. In addition to providing access to the insurance company, the Wholesale Insurance Broker/Managing General Agent may provide additional services including, but not limited to: underwriting; loss control; risk placement; coverage review; claims coordination with insurance company; and policy issuance. Compensation paid for those services is derived from your premium payment, which may on average be 15% of the premium you pay for coverage, and may include additional fees charged by the intermediary.

Questions and Information Requests. Should you have any questions, or require additional information, please contact this office at (386) 252-6176 or, if you prefer, submit your question or request online at http://www.bbinsurance.com/customerinquiry/.

PREFERRED Compensation Disclosure

We appreciate the opportunity to assist with your insurance needs. Information concerning compensation paid to other entities for this placement and related services appears below. Please do not hesitate to contact us if any additional information is required.

Our office is owned by Brown & Brown, Inc. Brown & Brown entities operate independently and are not required to utilize other companies owned by Brown & Brown, Inc., but routinely do so.

For the 2024 – 2025 policy year, your insurance was placed with Preferred Governmental Insurance Trust (*Preferred*). *Preferred* is an insurance trust formed by Florida public entities through an Interlocal Agreement for the purpose of providing its members with an array of insurance coverages and services. *Preferred* has contracted with entities owned by Brown & Brown, Inc. to perform various services. As explained below, those Brown & Brown entities are compensated for their services.

Preferred has contracted with Public Risk Underwriters (PRU), a company owned by Brown & Brown, Inc., to administer *Preferred*'s operations. The administrative services provided by PRU to *Preferred* include:

- Underwriting
- Coverage review
- Marketing
- Policy Review
- Accounting
- Issuance of *Preferred* Coverage Agreements
- *Preferred* Member Liaison
- Risk Assessment and Control

Pursuant to its contract with *Preferred*, Public Risk Underwriters of Florida, Inc. (PRU) receives an administration fee, based on the size and complexity of the account, of up to 10% of the *Preferred* premiums billed and collected.

Preferred has also contracted with Preferred Governmental Claims Solutions (PGCS), a company owned by Brown & Brown, Inc., for purposes of administering the claims of *Preferred* members. The services provided by PGCS to *Preferred* may include:

- Claims Liaison with Insurance Company
- Claims Liaison with *Preferred* Members
- Claims Adjustment

Pursuant to its contract with *Preferred*, PGCS receives a claims administration fee for those accounts which PGCS services of up to 5% of the non-property portion of the premiums you pay to *Preferred*.

Preferred also utilizes wholesale insurance brokers, some of which (such as Peachtree Special Risk Brokers and Apex Insurance Services) are owned by Brown & Brown, Inc., for the placement of *Preferred*'s insurance policies. The wholesale insurance broker may provide the following services:

- Risk Placement
- Coverage review
- Claims Liaison with Insurance Company
- Policy Review
- Current Market Intelligence

The wholesale insurance broker's compensation is largely dictated by the insurance company. It typically ranges between 10% and 17% of the premiums you pay to *Preferred* for your coverage.

Naples Heritage Community Development District

Brown & Brown

Notice of Carrier Financial Status

Risk Management Associates, Inc., and its parent company, Brown & Brown, Inc. (collectively "Brown & Brown") do not certify, warrant or guarantee the financial soundness or stability of any insurance carrier or alternative risk transfer or pooling entity. We endeavored to place your coverage with an insurance carrier with an AM Best Company financial rating of "A-" or better.* While Brown & Brown cannot certify, warrant or guarantee the financial soundness or stability of any insurance carrier or alternative risk transfer or pooling entity or otherwise predict whether the financial condition of any such entity might improve or deteriorate, we are hereby providing you with notice and disclosure of financial condition so that you can make an informed decision regarding the placement of coverage. Accordingly, with receipt of this notice you acknowledge the following with regard to the placement and any subsequent renewal of the coverage indicated below:

- Brown & Brown may have other options for your insurance placement, including quotations with insurance carriers holding an "A-" or better rating from AM Best Company. Alternative quotes may be available with an A- or better rated carrier upon your request.
- Coverage is being renewed **Preferred Governmental Insurance Trust** ("***Preferred***"), which is as a Florida local government self-insurance fund established pursuant to Section 624.4622, Florida Statutes, as such ***Preferred*** is not rated by the AM Best Company.
- ***Preferred*** is not subject to the protections afforded by any state guaranty fund or association.
- The financial condition of insurance companies and other coverage providers including local government self-insurance funds like ***Preferred*** may change rapidly and that such changes are beyond the control of Brown & Brown.
- You should review the financial and membership information from ***Preferred*** and agree to abide by the conditions of membership established by ***Preferred***.
- You should consider the information provided, including the ***Preferred*** coverage quote and coverage placement and review it with your accountants, legal counsel and advisors.

Named Insured:	Naples Heritage Community Development District
Line of Coverage(s):	General Liability and Employee Benefits Liability, Public Officials and Employment Practices Liability, Cyber Liability, Automobile Liability
Policy Number(s):	PK FL1 0114007 25-19
Policy Period(s):	10/1/2025 – 10/1/2026
Date of Notice:	7/31/2025

*** AM Best Rating Guide: Rating for Stability: A++ to F = Highest to lowest rating**
Financial Size Category: XV to I - Largest to smallest rating

Guide to Bests Ratings		
Best Category	**Rating**	**Description**
Secure	A++	Superior
Secure	A+	Superior
Secure	A	Excellent
Secure	A-	Excellent
Secure	B++	Very Good
Secure	B+	Very Good
Vulnerable	B	Fair
Vulnerable	B-	Fair
Vulnerable	C++	Marginal
Vulnerable	C+	Marginal
Vulnerable	C	Weak
Vulnerable	C-	Weak
Vulnerable	D	Poor
Vulnerable	E	Under Regulatory Supervision
Vulnerable	F	In Liquidation
Vulnerable	S	Rating Suspended
Not Rated	NR-1	Insufficient Data
Not Rated	NR-2	Insufficient Size and/or operating experience
Not Rated	NR-3	Rating Procedure Inapplicable
Not Rated	NR-4	Company Request
Not Rated	NR-5	Not Formally Followed
Rating Modifier	u	Under Review
Rating Modifier	q	Qualified
Affiliation Code	g	Group
Affiliation Code	p	Pooled
Affiliation Code	r	Reinsured

Guide to Best's Financial Size Categories		
Reflects size of insurance company based on their capital, surplus and conditional reserve funds in U.S. dollars.	**I**	Less than $1,000,000
	II	$1,000,000 - $2,000,000
	III	$2,000,000 - $5,000,000
	IV	$5,000,000 - $10,000,000
	V	$10,000,000 - $25,000,000
	VI	$25,000,000 - $50,000,000
	VII	$50,000,000 - $100,000,000
	VIII	$100,000,000 - $250,000,000
	IX	$250,000,000 - $500,000,000
	X	$500,000,000 - $750,000,000
	XI	$750,000,000 - $1,000,000,000
	XII	$1,000,000,000 - $1,250,000,000
	XIII	$1,250,000,000 - $1,500,000,000
	XIV	$1,500,000,000 - $2,000,000,000
	XV	Greater than $2,000,000,000

Brown & Brown always strives to place your coverage with highly secure insurance companies. We cannot, however, guarantee the financial stability of any carrier.

Preferred® PGIT GOVERNMENTAL INSURANCE TRUST

Named Covered Party: Naples Heritage Community Development District
Term: 10/01/2025 to 10/01/2026
Coverage Provided by: Preferred Governmental Insurance Trust
Quote Number: PK FL1 0114007 25-19 01

YOU ARE ELECTING NOT TO PURCHASE CERTAIN VALUABLE COVERAGE WHICH PROTECTS YOU AND YOUR FAMILY OR YOU ARE PURCHASING UNINSURED MOTORISTS LIMITS LESS THAN YOUR BODILY INJURY LIABILITY LIMITS WHEN YOU SIGN THIS FORM. PLEASE READ CAREFULLY.

Uninsured Motorist coverage provides for payment of certain benefits for damages caused by owners or operators of uninsured motor vehicles because of bodily injury or death resulting there from. Such benefits may include payments for certain medical expenses, lost wages, and pain and suffering, subject to limitations and conditions contained in the Coverage Agreement. For the purpose of this coverage, an uninsured motor vehicle may include a motor vehicle as to which the bodily injury limits are less than your damages.

Florida law requires that automobile liability coverage agreements include Uninsured Motorist coverage at limits equal to the Bodily Injury limits in your coverage agreement unless you select a lower limit offered by the Trust or reject Uninsured Motorist entirely. Please indicate whether you desire to entirely reject Uninsured Motorist coverage, or, whether you desire this coverage at limits lower than the Bodily Injury Liability limits of your Coverage Agreement:

[X] a. I hereby reject Uninsured Motorist coverage.

[ ] b. I hereby select the following Uninsured Motorist limits which are lower than my Bodily Injury Liability Limits:
each person (enter limit if applicable):
each accident.

[ ] c. I hereby select Uninsured Motorist coverage limits equal to my Bodily Injury Liability limits. (If you select this option disregard the bold face statement above.)

ELECTION OF NON-STACKED COVERAGE
(Do not complete if you have rejected Uninsured Motorist)

You have the option to purchase, at a reduced rate, non-stacked (limited) type of Uninsured Motorists coverage. Under this form if injury occurs in a vehicle owned or leased by you or any family member who resides with you, this Coverage Agreement will apply only to the extent of coverage (if any) which applies to that vehicle in this Coverage Agreement. If an injury occurs while occupying someone else's vehicle, or you are struck as a pedestrian, you are entitled to select the highest limits of Uninsured Motorist coverage available on any one vehicle for which you are a Named Covered Party, covered family member, or covered resident of the Named Covered Party's household. This Coverage Agreement will not apply if you select the coverage available under any other Coverage Agreement issued to you or the Coverage Agreement of any other family member who resides with you.

If you do not elect to purchase the non-stacked form, your Coverage Agreement limit(s) for each motor vehicle are added together (stacked) for all covered injuries. Thus, your Coverage Agreement limits would automatically change during the Coverage Agreement term if you increase or decrease the number of autos covered under the Coverage Agreement.

[ ] I hereby elect the non-stacked form of Uninsured Motorist coverage.

I understand and agree that selection of any of the above options applies to my liability Coverage Agreement and future renewals or replacements of such Coverage Agreement which are issued at the same Bodily Injury Liability limits. If I decide to select another option at some future time, I must let the Trust or my agent know in writing.

SIGN HERE

Signature _____ **Title** District Manager/Secretary
Name Justin Faircloth **Date** 8/21/25

The brief description of coverage contained in this document is being provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

Named Covered Party: Naples Heritage Community Development District
Term: 10/01/2025 to 10/01/2026
Coverage Provided by: Preferred Governmental Insurance Trust
Quote Number: PK FL1 0114007 25-19 01

Signature Page

I hereby confirm that the limits/coverages as shown here, corresponding with the Coverage Agreement, are correct:

N/A	**Property**	**TIV: Not Included Building and Contents combined**
N/A	**Inland Marine**	**Blanket Unscheduled IM: Not Included** **Scheduled Inland Marine: Not Included** **Total All Inland Marine: Not Included**
N/A	**Property TRIA (Terrorism Risk Insurance Act) coverage**	
N/A	**Crime**	
X	**General Liability**	**Ratable Payroll: Not Included**
N/A	**Law Enforcement Liability**	**Officers: Not Included**
X	**Professional Liability**	**Employees: Not Included**
X	**Automobile**	**0 Units - Auto Liability** **0 Units - Comprehensive** **0 Units – Collision**
N/A	**Stop Loss Aggregate:** **Applies to:**	**Not Included**
N/A	**Excess Workers' Compensation**	**Payroll: Not Included**
N/A	**I confirm that I have received a copy of Preferred's Current Interlocal Agreement (last amended October 1, 2004) and Amendment A (effective October 1, 2013).**	
N/A	**I confirm having read and agreed to the terms as laid out in the attached Preferred Participation Agreement (which also requires a signature).**	

A signed copy of the following is also required where applicable: First Page of Preferred Application; Professional Liability Application; Uninsured Motorist Rejection/Election Form; SIR Signature Page.

SIGN HERE

Signature _____ **Title** District Manager/Secretary
Name Justin Faircloth **Date** 8/21/25

Coverage is provided by Preferred Governmental Insurance Trust

The brief description of coverage contained in this document is being provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

7F.i.

Estimate

Arrowhead Tree Service LLC
(504)3763075
jason@arrowheadtree.com
8891 Brighton ln Suite 105 Bonita Springs, FL 34135

BILL TO
Naples Heritage Golf Country Club
2397329149
8150 Heritage Club Way Naples, FL 34112

Estimate # 194
Date Sep 26, 2025

Item	Quantity	Price	Amount
2 Pine Tree Removals (Flush Cut Stumps)	2	$700.00	$1,400.00
Arrowhead Tree will Climb both pine trees to piece down safely.			

Subtotal	$1,400.00
Grand Total	**$1,400.00**

Sep 26, 2025

7F.ii.

PRISTINE
Lakes and Wetlands

SPECIAL SERVICE AGREEMENT

This Agreement is made between **Pristine Lakes and Wetlands LLC** and:

May 15th 2025

Naples Heritage CDD
C/0 Inframark
210 N University Drive Suite 702
Coral Springs, Fl 330171

Both Naples Heritage CDD **(CUSTOMER)** and **Pristine Lakes and Wetlands LLC (PLW)** agree to these terms and conditions for this special service contract.

Description of Services: Two options for treating all invasive trees and shrubs along the berm at Naples Heritage:

Option 1: Mechanical Treatment

- Scope: Treat all invasive trees and shrubs using machinery.
- **Total Cost: $12,000**
- Estimated Duration: 6 days

Option 2: Manual Treatment

ACCEPT OPTION 2

- Scope: Treat all invasive trees and shrubs by hand.
- Total Cost: $6,800
- Estimated Duration: 4–5 days

TERMS AND CONDITIONS:

1-Ownership of property is implied by the CUSTOMER with acceptance of this agreement. If the CUSTOMER does not expressly own the areas where the above-stated services will be provided. CUSTOMER represents that express permission of the OWNER is given and that authorization to commence the services mentioned above is allowed.
In the event of a dispute of ownership, the CUSTOMER agrees to hold PLW harmless for the consequences of such services.

2. Invoices submitted for work completed shall be paid within 30 days of receipt or a finance charge of 1.00% per month or an annual percentage rate of 12.000 % will be computed on all past due balances.

3. Any incidental activity not explicitly mentioned in this proposal is excluded from the scope of work.

4. This proposal shall be valid for 30 days.

5-PLW shall not be responsible for acts beyond its reasonable control, including adverse soil and / or water conditions, adverse weather conditions, unavailable materials, Acts of God, war, acts of vandalism, theft, or third-party actions. CUSTOMER further states that neither party shall be responsible in damages or penalties for any failure or delay in performance of any of its obligations caused by above named incidences.

6. If PLW is required to enroll in any third-party compliance programs, invoicing or payment plans that assess fees to perform work for CUSTOMER, any charges related will be invoiced back to CUSTOMER as invoiced to PLW

7. PLW will maintain insurance coverage, which includes but is not limited to; General Liability Property Damage, Automobile Liability, and Workman's Compensation at its own expense.

8. Pristine Lakes and Wetland utilizes the federal E-Verify program in contract with public employers as required by Florida State law and acknowledge all the provisions of Florida Statue 448.095 are incorporated herein by reference and hereby certifies it will comply with the same.

9. No alterations or modifications, oral or written, of the terms contained above shall be valid unless made in writing, and wholly accepted by authorized representatives of both PLW and the CUSTOMER.

10. The CUSTOMER shall allow PLW access to enter private or public areas to perform work.

11. Irrigation of planted areas is the responsibility of the CUSTOMER If irrigation does not cover the planted area, plant survival cannot be guaranteed. (Unless planting is completed in the May-June months).

12. PLW will replace any sod that gets damaged during the project.

Planting Agreement

All plants provided and installed under the terms of this agreement are guaranteed to be of good quality and free of existing diseases or defects at the time of installation.

PLW guarantees (80%) survivorship at the end of 360 days and will replace any plant materials we have installed. Our guarantee does not include the loss of plant material due to "acts of god" such as floods, fire, hurricanes, or other catastrophic events, nor does it include losses due to theft, lack of irrigation, vandalism, chemical treatment or negligence by others, or other factors outside the control of our organization.

Customer Responsibilities:

1- CUSTOMER will be responsible for the cost of any necessary permits that may be required prior to commencement of work.
2- Provide all available as built or other plants related to the areas to be restored, used for staging, or otherwise impacted by the project work.

3- Mark all sprinklers' heads and other items that are buried and not readily visible and obvious upon original visual inspection.
4- It is CUSTOMER'S responsibility to irrigate the new sod /planted area once installed.

OWNER AUTHORIZATION: I Warrant and represent that I 'am authorized to enter this agreement for professional services and I hereby authorize the performance of the above services and I agree to pay the charges upon the completion of the job or project referred above. I have also read, understand, and agree with all the terms and conditions in this agreement.

Authorized Signature: _____ Date: 5/19/25

Typed Name and Tittle: KENNETH R. GAYNOR CDD CHAIRMAN

Any questions regarding this agreement please contact info@pristinelakes.net or call (239)580-8711.

7Fiii

PRISTINE
Lakes and Wetlands

SPECIAL SERVICE AGREEMENT

This Agreement is made between **Pristine Lakes and Wetlands LLC** and:

May 15th 2025

Naples Heritage CDD
C/O Inframark
210 N University Drive Suite 702
Coral Springs, Fl 330171

Both Naples Heritage CDD **(CUSTOMER)** and **Pristine Lakes and Wetlands LLC (PLW)** agree to these terms and conditions for this special service contract.

Scope of Work: Storm Drain Repair Quote

Description of Work:

- Excavate the area around the storm drain as needed to ensure proper grading and access.
- Install a layer of erosion control mesh to stabilize the soil and prevent future washouts.
- Place and secure rip rap (large angular rock) over the mesh to reinforce the area, reduce erosion, and improve drainage flow.
- Compact and contour the material to ensure long-term durability and proper water movement.

Total Cost: $1,800

This repair is designed to prevent soil erosion, maintain structural integrity around the drain, and improve stormwater management in the area.

TERMS AND CONDITIONS:

1-Ownership of property is implied by the CUSTOMER with acceptance of this agreement. If the CUSTOMER does not expressly own the areas where the above-stated services will be provided. CUSTOMER represents that express permission of the OWNER is given and that authorization to commence the services mentioned above is allowed.
In the event of a dispute of ownership, the CUSTOMER agrees to hold PLW harmless for the consequences of such services.

2. Invoices submitted for work completed shall be paid within 30 days of receipt or a finance charge of 1.00% per month or an annual percentage rate of 12.000 % will be computed on all past due balances.

3. Any incidental activity not explicitly mentioned in this proposal is excluded from the scope of work.

4. This proposal shall be valid for 30 days.

5-PLW shall not be responsible for acts beyond its reasonable control, including adverse soil and / or water conditions, adverse weather conditions, unavailable materials, Acts of God, war, acts of vandalism, theft, or third-party actions. CUSTOMER further states that neither party shall be responsible in damages or penalties for any failure or delay in performance of any of its obligations caused by above named incidences.

6. If PLW is required to enroll in any third-party compliance programs, invoicing or payment plans that assess fees to perform work for CUSTOMER, any charges related will be invoiced back to CUSTOMER as invoiced to PLW

7. PLW will maintain insurance coverage, which includes but is not limited to; General Liability Property Damage, Automobile Liability, and Workman's Compensation at its own expense.

8. Pristine Lakes and Wetland utilizes the federal E-Verify program in contract with public employers as required by Florida State law and acknowledge all the provisions of Florida Statue 448.095 are incorporated herein by reference and hereby certifies it will comply with the same.

9. No alterations or modifications, oral or written, of the terms contained above shall be valid unless made in writing, and wholly accepted by authorized representatives of both PLW and the CUSTOMER.

10.The CUSTOMER shall allow PLW access to enter private or public areas to perform work.

11.Irrigation of planted areas is the responsibility of the CUSTOMER If irrigation does not cover the planted area, plant survival cannot be guaranteed. (Unless planting is completed in the May-June months).

12.PLW will replace any sod that gets damaged during the project.

Planting Agreement

All plants provided and installed under the terms of this agreement are guaranteed to be of good quality and free of existing diseases or defects at the time of installation.

PLW guarantees (80%) survivorship at the end of 360 days and will replace any plant materials we have installed. Our guarantee does not include the loss of plant material due to "acts of god" such as floods, fire, hurricanes, or other catastrophic events, nor does it include losses due to theft, lack of irrigation, vandalism, chemical treatment or negligence by others, or other factors outside the control of our organization.

Customer Responsibilities:

1- CUSTOMER will be responsible for the cost of any necessary permits that may be required prior to commencement of work.
2- Provide all available as built or other plants related to the areas to be restored, used for staging, or otherwise impacted by the project work.
3- Mark all sprinklers' heads and other items that are buried and not readily visible and obvious upon original visual inspection.
4- It is CUSTOMER'S responsibility to irrigate the new sod /planted area once installed.

OWNER AUTHORIZATION: I Warrant and represent that I 'am authorized to enter this agreement for professional services and I hereby authorize the performance of the above services and I agree to pay the charges upon the completion of the job or project referred above. I have also read, understand, and agree with all the terms and conditions in this agreement.

Authorized Signature: Kenneth R Gaynor Date: 5/19/25

Typed Name and Tittle: Kenneth R Gaynor CDD Chairman

Any questions regarding this agreement please contact info@pristinelakes.net or call (239)580-8711.